

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

Application of Pacific Gas and Electric Company  
for Approval of Energy Savings Assistance and  
California Alternate Rates for Energy Programs and  
Budgets for 2021-2026 Program Years. (U39M)

And Related Matters.

Application 19-11-003  
(Filed November 4, 2019)

Application 19-11-004  
Application 19-11-005  
Application 19-11-006  
Application 19-11-007

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

Rebecca D. Hansson

*Attorney for:*

**SAN DIEGO GAS & ELECTRIC COMPANY**

8330 Century Park Court, CP32D

San Diego, CA 92123-1530

Telephone: (858) 654-8278

Facsimile: (619) 699-5027

Email: rhansson@sdge.com

September 21, 2021

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

Application of Pacific Gas and Electric Company  
for Approval of Energy Savings Assistance and  
California Alternate Rates for Energy Programs and  
Budgets for 2021-2026 Program Years. (U39M)

And Related Matters.

Application 19-11-003  
(Filed November 4, 2019)

Application 19-11-004  
Application 19-11-005  
Application 19-11-006  
Application 19-11-007

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

Pursuant to California Public Utilities Commission Rules of Practice and Procedures, Rule 1.12 and the extension request granted by Executive Director Rachel Peterson, San Diego Gas & Electric Company (SDG&E) hereby submits the Amended Monthly Report on SDG&E's Low Income Assistance Programs for July 2021 (Amended Report).<sup>1</sup> The purpose of this report is to consolidate activity for the California Alternate Rates for Energy (CARE) Program and Energy Savings Assistance (ESA) Program and provide the California Public Utilities Commission's Energy Division with information to assist in analyzing the low-income programs.

SDG&E provides this Amended Report to:

- Update tables within Section 1.2.2 of the ESA narrative,
- Report on CARE activities within Section 2, and
- Include CARE reporting tables 1 through 8.

---

<sup>1</sup> Pursuant to Rule 16.6 of the Commission's Rules of Practice and Procedure, on May 12, 2021, SDG&E submitted a request to Rachel Peterson, Executive Director for the California Public Utilities Commission, for an extension of time until July 21, 2021, to provide CARE Program data due to unforeseen issues in relation to the cut over to SDG&E's recently implemented Customer Information System (CIS), also known as Envision. The extension was granted on May 21, 2021. Subsequently, on July 9, 2021, SDG&E submitted a second extension request for an additional two months, with a requested filing date of September 21, 2021. The extension was granted on July 28, 2021. Accordingly, CARE Program data for the months of April through August will be filed on September 21, 2021.

This report presents year-to-date ESA Program and CARE Program results and expenditures through July 31, 2021, for San Diego Gas & Electric Company.<sup>2</sup> The ESA-related revisions within the Amended Report and accompanying reporting table revisions are shown in redline. However, since the entirety of the CARE narrative in Section 2 of this report was omitted in the original report, that section will not be redlined for ease of review. Similarly, the CARE Tables 1 through 8, accompanying this Amended Monthly Report, are not redlined, but include a note at the top indicating that they are newly filed.

Respectfully Submitted,

*/s/ Rebecca D. Hansson*

\_\_\_\_\_  
*Rebecca D. Hansson*

*Attorney for:*

**SAN DIEGO GAS & ELECTRIC COMPANY**

8330 Century Park Court, CP32D

San Diego, CA 92123-1530

Telephone: (858) 654-8278

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

September 21, 2021

---

<sup>2</sup> Pursuant to Decision (D.) 21-06-015, SDG&E will file monthly FERA reports, combined with this report, after Energy Division approval of a reporting template that includes the specifics of FERA reporting criteria. *See* D.21-06-015 at 435.



**AMENDED**

**San Diego Gas & Electric Company**

**Energy Savings Assistance (ESA) Program**

**And**

**California Alternate Rates for Energy (CARE)**

**Program**

## TABLE OF CONTENTS

<b>1.</b>	<b>ESA PROGRAM EXECUTIVE SUMMARY.....</b>	<b>1</b>
1.1.	<i>ESA Program Overview.....</i>	<i>1</i>
1.2.	<i>ESA Program Customer Outreach and Enrollment Update.....</i>	<i>4</i>
1.3.	<i>Leveraging Success Evaluation, Including CSD .....</i>	<i>13</i>
1.4.	<i>Workforce Education &amp; Training (WE&amp;T) .....</i>	<i>15</i>
1.5.	<i>Miscellaneous .....</i>	<i>16</i>
<b>2.</b>	<b>CARE EXECUTIVE SUMMARY (NEW).....</b>	<b>17</b>
2.1.	<i>CARE Program Summary.....</i>	<i>17</i>
2.2.	<i>Outreach .....</i>	<i>18</i>
2.3.	<i>CARE Recertification Complaints .....</i>	<i>21</i>
<b>3.</b>	<b>CHANGES REPORTING.....</b>	<b>22</b>
<b>4.</b>	<b>AMENDED APPENDIX A – ESA AND CARE PROGRAM TABLES.....</b>	<b>23</b>

## AMENDED ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

### 1. ESA PROGRAM EXECUTIVE SUMMARY

#### 1.1. ESA Program Overview

In Guidance Decision (D.) 19-06-022, the California Public Utilities Commission (CPUC or Commission) authorized CARE and ESA Program bridge funding up to 2020 program year (PY) levels for the first six months of 2021 and up to a year if the Commission had not approved applications for PY 2021 by November 16, 2020.<sup>1</sup> Subsequently, the Commission issued D.20-08-033 to modify certain bridge funding requirements. In compliance with D.20-08-033, SDG&E filed Advice Letter 3612-E/2905-G (ESA Bridge Funding AL) with a proposed ESA Program bridge funding budget and retreatment goal for the January 1, 2021, through June 30, 2021 bridge period.<sup>2</sup> In addition, D.19-06-022 automatically authorizes CARE Program activity for January through June 2021 without the need for prior advice letter approval. On June 3, 2021, the Commission voted and unanimously approved, with modifications, the *Decision on Large Investor-Owned Utilities' and Marin Clean Energy's California Alternate Rates for Energy (CARE), Energy Savings Assistance (ESA), and Family Electric Rates for Energy (FERA) Program Applications for Program Years 2021-2026*, which authorized budgets and goals effective July 2021.<sup>3</sup> The authorized program budgets and homes treated goals in this monthly report reflect the six-month period, July through December of program year 2021, as authorized by the Commission in D.21-06-015.<sup>4</sup>

---

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

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

<sup>3</sup> D.21-06-015 at 472, Ordering Paragraph (OP) 3, and at 490, OP 82.

<sup>4</sup> *Id.*

## COVID-19 Program Impacts

On October 30, 2020, SDG&E notified its ESA contractors and Energy Division that the Post-Pandemic Return to Service (PPRS) credit-earning period would begin on December 1, 2020, and end on May 31, 2021.<sup>5</sup> SDG&E is pleased to report that all five ESA contractors who accepted advance payments have earned the full PPRS eligible amounts. Additionally, all but one contractor has repaid the excess amount of the advance payment used for items not eligible for PPRS credits; that contractor continues to make payments and is expected to repay the ineligible amount prior to December 31, 2021.

SDG&E Outreach and Assessment (O&A) contractors continued to provide in-home enrollments and treatments, plus offered virtual enrollments to customers preferring to delay in-home treatment. Contractors are primarily enrolling in person, with less than 1% of enrollments occurring via telephone enrollment efforts. All ESA Program contractors are fully operational, however SDG&E's primary Outreach and Assessment contractor indicated that six employees were quarantined in July due to COVID, impacting program enrollments.

---

<sup>5</sup> See Resolution E-5074 at 10, which states "The IOUs should provide a 30 day advance notice to contractors of when the six-month PPRS credit-earning period begins." The IOUs consist of Pacific Gas and Electric Company, SDG&E, Southern California Gas Company, and Southern California Edison Company.

**1.1.1. Provide a summary of the ESA Program elements as approved in Decision (D.) 21-06-015.**

<b>ESA Program Summary July through December 2021</b>			
	<b>2021 Authorized / Planning Assumptions<sup>6,7</sup></b>	<b>Actual to Date</b>	<b>%</b>
Budget <sup>8</sup>	\$ 11,768,190	\$ 1,329,366	11%
Homes Treated <sup>9</sup>	5,973	2,322	39%
kWh Saved	N/A	181,475	N/A
kW Demand Reduced	N/A	25	N/A
Therms Saved	N/A	463	N/A
GHG Emissions Reduced (Tons)	N/A	103	N/A

The above table includes a budget related to the ESA MF CAM initiative but does not include the associated treatment or savings targets. This approach is consistent across the investor-owned utilities (IOUs). To ensure transparency and maintain comparability across IOUs, SDG&E is including the below table with information specific to ESA MF CAM budget, treatments, and savings targets.

---

<sup>6</sup> ESA budget and homes treated reflect those authorized in D.21-06-015 at 472 OP 3, and at 490, OP 82. The Decision did not establish savings and demand targets for 2021 and therefore are reflected as “N/A”.

<sup>7</sup> The kWh Saved, kW Demand Reduced, and Therms Saved categories do not include the authorized and actual savings or demand reduction for ESA CAM.

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

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



<b>Energy Savings Assistance Program Summary: Additional ESA Budget Reporting for July through December 2021</b>			
	<b>2021 Authorized / Planning Assumptions<sup>10</sup></b>	<b>Actual to Date</b>	<b>%</b>
MF CAM Budget	\$ 950,000	\$ 76,867	8%
MF CAM Properties Treated	22	1	5%
kWh Saved	N/A	38,848	N/A
kW Demand Reduced	N/A	9	N/A
Therms Saved	N/A	0	N/A

## **1.2. ESA Program Customer Outreach and Enrollment Update**

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

Below is a summary of ESA Program specific efforts conducted this month. Joint CARE and ESA Programs marketing, education and outreach efforts are provided in section 1.2.2 below.

#### ESA Program Contractor Outreach

SDG&E's largest O&A contractor continued increased targeting efforts toward single-family homes to improve energy savings. Previously, ESA Program installations were heavily focused on enrolling a larger number of eligible customers, which meant that contractors were targeting multifamily units due to ease of enrollment. However, treatment of multifamily units often results in fewer measures installed when compared to those of single-family properties, primarily due to property owner authorization requirements (POA) for the installation of certain measures. During this month, 366 ESA enrollments were received through canvassing efforts,

---

<sup>10</sup> The budget and MF CAM Properties Treated reflect SDG&E's proposed ESA CAM budget of \$950,000 and treatment of 22 properties for July through December 2021 per Advice Letter 3820-E/3004-G, submitted August 2, 2021 and pending Energy Division disposition. Decision 21-06-015 did not establish savings and demand targets for 2021, nor did it require such proposals, therefore the "Authorized" column reflects these as "N/A".

which is a 37% decrease over the prior month activity, which is likely due to the change in the effort to target greater energy savings as opposed to a greater number of overall enrollments combined with the COVID employee quarantine challenges identified in Section 1.1. Overall, ESA Program Marketing, Education, and Outreach (ME&O) efforts were successful in creating 1,903 leads and 640 enrollments.

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In July 2021, SDG&E's ESA Program MF CAM implementer continued targeted marketing to potential ESA MF CAM properties, including re-syndication projects in SDG&E's service territory. One property was treated this month for a total of 17 properties in 2021. In addition, five properties are currently receiving measure installations, and there are a total of four properties pending energy assessments/audits.

Language Line

Language Line® is utilized to make sure customers with limited English proficiency (LEP) have a channel in which to communicate with ESA Program contractors in the language of their preference. As detailed in the table below, three customers were served by the Language Line this month.

<b>Language</b>	<b>Calls</b>
Arabic	1
Korean	1
Vietnamese	1
<b>TOTAL</b>	<b>3</b>

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

ME&O activities summarized below represent joint efforts on behalf of the CARE and ESA Programs. SDG&E utilizes an integrated ME&O strategy by connecting with customers using general awareness marketing, direct marketing, and community outreach and engagement. The intent of the 2021 campaign is to make a connection with customers in order to drive conservation and provide monthly savings on their energy bill. The campaign will run in English, Spanish, and Asian languages and may include television, streaming radio, outdoor, print, digital (including paid search), email, direct mail, and bill inserts, as well as a robust outreach program. SDG&E will continue to monitor the status of the COVID-19 pandemic and adjust ME&O efforts accordingly.

#### **General Awareness Marketing**

General awareness marketing allows SDG&E to connect with its customers through mass media efforts reaching both mass audiences and hard-to-reach populations, including customers in rural areas, seniors, customers with special needs, and multilingual/multicultural customers. The tactics leveraged this month are summarized in the following sections:

##### Online Advertising

SDG&E continued a digital advertising campaign. Paid Search continued to run and garnered 576,445 impressions with a Click-Through-Rate (CTR) of 11%. Display ads for July received 1,955,077 impressions with a CTR of 0.12%. Native online advertising had 446,177 impressions with a CTR of 0.3%.

## Social Media

Using e-newsletters, website posts, and social media channels, the Energy Solutions Partner Network shared over 128 customer assistance messages to an audience of more than 281,000 followers. SDG&E's social media profile also posts messaging to an audience of more than 40,000 followers. These messages are then able to be redistributed to other networks on social media.



## Direct Marketing

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

### Email

SDG&E sent an email to promote the ESA Program to potential customers, which was sent to 281,885 customers with a 29% Open Rate and 1.7% CTR.

### Direct Mail

SDG&E sent out 1,540 direct mail pieces to promote the ESA Program to potential customers.

### Live CARE Call Campaign

SDG&E's third-party contractor, The Harris Group (THG), called targeted customers to enroll in the CARE Program.<sup>11</sup> The campaign provides SDG&E with a way to directly connect with customers in low-income and hard-to-reach areas. THG provides education about the CARE and ESA Programs and assists customers in completing program application forms.

Outbound call activities generated the following numbers this month:

<b>The Harris Group<sup>12</sup></b>	
ESA Leads	410 $\theta$
CARE Enrollments	832 N/A
CARE Recertifications	0 N/A

---

<sup>11</sup> THG is a Diverse Business Enterprise (DBE) vendor and a woman-owned business.

<sup>12</sup> Pursuant to Rule 16.6, on May 12, 2021, SDG&E submitted a request for extension of time to comply for certain CARE data in the April 2021 and May 2021 Low Income Monthly Reports (A.14-11-007 et al) due to SDG&E's recent Customer Information System (Envision) upgrade on April 5, 2021. The request for extension was approved on May 21, 2021. Subsequently, on July 9, 2021, SDG&E submitted a second extension request for an additional two months, with a requested filing date of September 21, 2021. The extension was granted on July 28, 2021.

## Community Outreach & Engagement

### Energy Solutions Partner Network

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

<b>Energy Solutions Partner Network<sup>13</sup></b>	
ESA Leads	0
CARE Enrollments	4 N/A
CARE Recertifications	0 N/A

---

<sup>13</sup> Pursuant to Rule 16.6, on May 12, 2021, SDG&E submitted a request for extension of time to comply for certain CARE data in the April 2021 and May 2021 Low Income Monthly Reports (A.14-11-007 et al) due to SDG&E's recent Customer Information System (Envision) upgrade on April 5, 2021. The request for extension was approved on May 21, 2021. Subsequently, on July 9, 2021, SDG&E submitted a second extension request for an additional two months, with a requested filing date of September 21, 2021. The extension was granted on July 28, 2021.

### Partner Spotlight

SDG&E's Customer Outreach and Engagement team participated in 19 virtual events, presentations, trainings, and workshops that featured information and enrollment in energy solutions programs, services, and tools. Many of these activities were hosted by SDG&E's partner network and included drive-through events, such as food drives, where information was shared in a safe manner while following COVID-19 social distancing guidelines. Outreach activities were focused on engaging customers with programs and solutions such as CARE and ESA and reached over 4,900 people.

#### *CREER Comunidad Y Familia*

On July 6, SDG&E Outreach attended the weekly food resource fair in San Juan Capistrano hosted by CREER Comunidad Y Familia (CREER). CREER aims to provide children and youth academic success leading to higher education and an artistic base as alternatives to the negative influences that surround them. At the drive through resource fair, SDG&E promoted customer assistance programs along with the Arrearage Management Payment Plan (AMP)<sup>14</sup> and helped enroll customers in the CARE program.

---

<sup>14</sup> See Resolution E-5114, establishing the AMP.



*Boys & Girls Club of South Orange County*

On July 12, the SDG&E Outreach team presented on customer assistance programs and services to staff at the South Orange County Boys & Girls Club, who promote SDG&E programs to their members. In addition, SDG&E was able to provide information regarding Public Safety Power Shutoffs.

Multicultural Outreach

To continue efforts to reduce potential barriers and increase education and program enrollments for customers in the rural, multicultural/multilingual, and access and functional needs segments, SDG&E pairs multicultural contractors with employees that are fluent in various languages to help staff events and presentations. These contractors are fluent in the following languages: Spanish, Chinese, Aramaic/Arabic, and other languages as requested. During this reporting month, SDG&E participated in the following multicultural community outreach events:



Date	Event Name	Partner/Host	Location
7/23/2021	Wildfire Safety Fair	La Jolla Band of Luiseno Indians	Luiseno Band of Indians Tribal Hall, Pauma Valley CA.
7/31/2021	Day Of Play	Olivewood Gardens Learning Center	2525 North Ave., National City CA. 91950
7/31/2021	Inaugural Filipino American Friendship Festival	API Initiative	The Port Pavillion on Broadway Pier1000 N Harbor Drive, San Diego, 92101

**Other Customer Engagement Efforts**

In addition to SDG&E’s ME&O efforts described above in section 1.2.2, SDG&E has several other customer engagement efforts to educate, enroll, and provide direct service to its low-income customers. These efforts include direct service from SDG&E’s Customer Contact Center (CCC) and Payment Offices, as well as the distribution of materials through other SDG&E customer-facing groups/programs and field services teams. Updated information, as it relates to ongoing customer engagement and the impacts of the COVID-19 pandemic, will continue to be provided in subsequent monthly reports.

**SDG&E Customer Contact Center (CCC), Branch Offices, and Payment Offices**

SDG&E’s CCC, Branch Offices, and Payment Offices promote and offer the CARE and ESA Programs to potentially eligible customers. SDG&E also promotes these customer assistance solutions at its Authorized Payment Locations (APLs). Additionally, the Outreach team assists at Branch Office locations on a seasonal basis to help enroll customers. On March 20, 2020, SDG&E closed the branch offices to the public due to the COVID-19 pandemic. Branch offices are still accepting CARE applications at the building dropbox but have yet to reopen in 2021. Customers were urged to contact SDG&E’s CCC or go online to resolve utility issues.

In D.16-06-054, SDG&E received Commission authorization for its CCC Energy Service Specialists to enroll customers directly into the CARE Program over the telephone. During this reporting month, SDG&E’s CCC and Branch Office generated the following applications and leads over the telephone:

	CCC	Branch Office
ESA Leads	21	2
CARE Enrollments <sup>15</sup>	5 N/A	12 N/A
CARE Recertifications	0 N/A	0 N/A

### 1.3. Leveraging Success Evaluation, Including CSD

#### Single-Family Affordable Solar Housing (SASH) Program and Disadvantaged Communities Single-Family Affordable Solar Housing (DAC-SASH)

Pursuant to D.16-11-022, SDG&E was required to provide GRID Alternatives (GRID) with monthly reports of CARE High Energy Usage customers who have participated in the ESA Program for purposes of leveraging that information for potential home solar installation as part of the SASH program.<sup>16</sup> However, because the SASH program has exhausted program funding, GRID notified SDG&E that the monthly reports were no longer necessary. Accordingly, SDG&E is hereby providing the Commission with notice that it no longer intends to provide GRID with these monthly reports.

However, D.20-12-003 established the DAC-SASH program and new leveraging efforts, including annual data sharing of customer information, which includes ESA and CARE Program

---

<sup>15</sup> Pursuant to Rule 16.6, on May 12, 2021, SDG&E submitted a request for extension of time to comply for certain CARE data in the April 2021 and May 2021 Low Income Monthly Reports (A.14-11-007 et al) due to SDG&E’s recent Customer Information System (Envision) upgrade on April 5, 2021. The request for extension was approved on May 21, 2021. Subsequently, on July 9, 2021, SDG&E submitted a second extension request for an additional two months, with a requested filing date of September 21, 2021. The extension was granted on July 28, 2021.

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

information.<sup>17</sup> Additionally, GRID continues to provide SDG&E with leads received from the DAC-SASH program. Through July, SDG&E has received 20 leads from GRID, however, the leads have not resulted in any enrollments.

#### SDCWA Leveraging Effort

As part of SDG&E's leveraging agreement with San Diego County Water Authority (SDCWA), SDCWA reimburses SDG&E for water measures installed as part of the ESA Program in homes where customers have an active SDCWA account. During this reporting month, SDG&E did not submit any invoices to SDCWA for water savings measures.

#### LifeLine Data Share Effort

Ordering Paragraph (OP) 90 of D.16-11-022, as modified by D.17-12-009, directed the IOUs to regularly share CARE customer data with the California LifeLine Program to generate leads between the LifeLine, CARE, and ESA programs. The OP also directed the IOUs to file a mid-cycle advice letter to establish data sharing requirements including, and not limited to, relevant customer information and data share dates. Accordingly, SDG&E filed Advice Letter 3250-E/2688-G to establish a biannual data sharing plan to occur in January and July of each year. On July 24, 2021 SDG&E received a request to discontinue this data sharing effort because the LifeLine pilot that this data sharing effort was intended to support concluded on June 30, 2021. SDG&E does not intend to conduct any further data sharing with LifeLine.

---

<sup>17</sup> D.20-12-003, Appendix A outlines the requirements for utility data sharing efforts for the DAC-SASH Program.

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

SDG&E continues to partner closely with local Low-Income Home Energy Assistance Program (LIHEAP) agencies to improve leveraging opportunities between CSD's LIHEAP and the ESA Program. Both San Diego LIHEAP contractors, MAAC and Campesinos Unidos, continued enrollment efforts. SDG&E understands that LIHEAP agencies have also received additional payment assistance funding, which is expected to increase the leveraging opportunities between the two programs. During this reporting month, LIHEAP organizations generated 229 leads and enrolled 69 customers for the ESA Program.

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

**1.4.1. Please summarize efforts to improve and expand ESA Program workforce education and training. Describe steps taken to hire and train low-income workers and how such efforts differ from prior program years.**

SDG&E did not conduct any in-person training in conjunction with Workforce Education & Training (WE&T) efforts this month. WE&T online courses are available for contractors via SDG&E's website and email distributions, of which contractors are informed.

SDG&E continues to make progress in the development of an online training platform for ESA Program contractor education which will provide consistent outreach and assessment training. SDG&E is currently reviewing the contractor training modules and is on target to have the platform available for initial contractor training by the third quarter of 2021.

## **1.5. Miscellaneous**

### **1.5.1. ESA Program Studies**

#### 2022 Low Income Needs Assessment (LINA) Study

Southern California Edison Company (SCE) is managing the contract for the next statewide LINA study. The selected consultant for the 2022 LINA is Evergreen Economics. The project commenced in January 2021 and will be completed by December 2022. The study team is currently focused on data collection efforts involving customer surveys and in-depth interviews with key program stakeholders.

#### ESA CAM Process Evaluation

PG&E is leading a statewide process evaluation of the ESA CAM initiative. Nexant was selected as the consultant and a project initiation meeting was held with the study team on July 29, 2021.

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

SDG&E is not currently conducting any pilots.

## 2. CARE EXECUTIVE SUMMARY (NEW)<sup>18</sup>

### 2.1. CARE Program Summary

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

CARE Budget Categories	Authorized Budget <sup>19</sup>	Actual Expenses to Date	% of Budget Spent
Outreach	\$ 3,214,243	\$ 1,198,984	37%
Proc., Certification and Verification	\$ 564,994	\$ 475,129	84%
Post Enrollment Verification <sup>20</sup>	\$ 438,896	\$ (31,787)	-7%
Information Tech./Programming	\$ 1,120,000	\$ 237,406	21%
Pilots-CHANGES	\$ 265,000	\$ 126,354	48%
Studies	\$ 28,125	\$ 0	0%
Regulatory Compliance	\$ 300,000	\$184,165	61%
General Administration	\$ 625,000	\$293,518	47%
CPUC Energy Division Staff	\$ 65,911	\$ 47,430	72%
Cooling Centers <sup>21</sup>	\$ 0	\$ 0	0%
<b>Total Expenses</b>	<b>\$ 6,622,169</b>	<b>\$ 2,531,198</b>	<b>38%</b>
Subsidies and Benefits <sup>22</sup>	\$ 145,472,843	\$ 93,519,598	64%
<b>Total Program Costs and Discounts</b>	<b>\$ 152,095,012</b>	<b>\$ 96,050,796</b>	<b>63%</b>

<sup>18</sup> This entire section is newly added to this report on September 21, 2021, pursuant to the extension granted by Executive Director, Rachel Peterson, on July 9, 2021.

<sup>19</sup> CARE budget reflects what was authorized in D.21-06-015 at 472, OP 2.

<sup>20</sup> Negative amount due to reclassification of labor costs within CARE Program from Post-Enrollment Verification category to Processing, Certification, and Verification.

<sup>21</sup> The funding for SDG&E's Cool Zones is no longer under the CARE Program. See D.17-12-009 at Ordering Paragraph 114.

<sup>22</sup> Reflects Subsidies and Benefits as authorized in Advice Letter 3620-E, effective January 1, 2021, and Advice Letter 2923-G, effective January 1, 2021.

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

<b>CARE Penetration</b>		
<b>Participants Enrolled</b>	<b>Eligible Participants<sup>23</sup></b>	<b>Penetration Rate</b>
342,851	293,584	117%

**2.2. Outreach**

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

In July 2021, marketing and outreach efforts may have contributed to 5,745 completed CARE applications and 3,518 new enrollments/recertifications for the program. Below is a summary of CARE specific outreach efforts.

**Direct Marketing**

Direct Mail

SDG&E continued the bill comparison campaign by mailing a comparison letter to 556 potential CARE customers. The letter compares a customer's average bill total for the last 12-months to what it would have been had they been enrolled in CARE receiving 30% or more off their energy bill. Customers are encouraged to call SDG&E's toll-free enrollment number or to apply through SDG&E's online application.

---

<sup>23</sup> On February 12, 2021, Pacific Gas and Electric Company (PG&E), on behalf of the IOUs, filed the Annual Estimates of CARE Eligible Customers and Related Information. This number reflects estimates of SDG&E's CARE Eligible Participants for 2021, as reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates.

## Email

During this reporting month, SDG&E continued with its Bill Comparison Nurture Campaign. The Nurture Campaign sends a series of automated, pre-written messages over a specified period to move customers closer to conversion. Contacts receive messages based on behavioral triggers and may receive up to three messages (including reminders) over a 30-day period, depending on engagement level. SDG&E sent out 319,922 emails, which generated a 33% open rate and a 3.3% CTR over the course of the month.

## **Community Outreach & Engagement**

Community outreach and engagement efforts allow SDG&E to educate, connect and directly engage with customers in communities where they work and live. Outreach and engagement activities included events, presentations, workshops, trainings, partnerships with CBOs, and customized efforts.

## CARE Partners (Capitation Agencies)

SDG&E partners with 18 social service agencies such as the Women's Infant & Children Organization (WIC) program, refugee assimilation organizations, and others to help enroll its hardest-to-reach customers (collectively, Capitation Agencies). These organizations serve high-risk, low-income individuals and families with enrollment in state and federally funded assistance programs, including Cal Fresh, LIHEAP, Covered California, and California Lifeline. The partnering organizations are in diverse low-income communities serving multicultural/multilingual, seniors, veterans, special needs, and LEP audiences and provide multilingual staffing. During the month of July, the following numbers were generated by the Capitation Agencies:



<b>Capitation Agencies</b>	
ESA Leads	73
CARE Enrollments	108
CARE Recertifications <sup>24</sup>	0

### Cool Zones

The San Diego County Cool Zone program is generally active between May through October of each year. Due to the COVID-19 pandemic, a limited number of locations opened as early as June 14 with a total of 16 open by the end of July.

### Women’s Infant & Children Organizations

In July, WIC offices were closed to in-person interactions because of COVID-19. The WIC offices, however, continue to field questions from their clientele via telephone. The WIC offices do not currently plan to re-open until the fall of 2021.

### County Health and Human Service Agency Collaboration

SDG&E collaborates with the County of San Diego Health and Human Services Agency (HHSA) to connect customers to programs like CARE. All field HHSA offices include a source coded CARE application in their new client intake packets. In July 2021, the following applications were received:

---

<sup>24</sup> Effective July 1, 2021, SDG&E resumed CARE post-enrollment verification, recertification, and high-usage post-enrollment verification requests consistent with the COVID-19 Emergency Customer Protection Transition Plan approved in Advice Letter 3729-E/2967-G (Transition Plan).

<b>HHSA</b>	<b>July</b>	<b>YTD</b>
ESA Leads	0	0
CARE Enrollments	54	413
CARE Recertifications <sup>25</sup>	0	198

### **2.3. CARE Recertification Complaints**

#### **2.3.1. Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE recertification efforts, with the nature of the complaints and resolution.**

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

---

<sup>25</sup> Effective July 1, 2021, SDG&E resumed CARE post-enrollment verification, recertification, and high-usage post-enrollment verification requests consistent with the COVID-19 Emergency Customer Protection Transition Plan approved in Advice Letter 3729-E/2967-G (Transition Plan).

### **3. CHANGES REPORTING**

In compliance with requirements outlined in D.12-12-011,<sup>26</sup> SDG&E has updated CARE Table 10 information for the month of June 2021. As of June 1, 2020, CARE Table 11 reports have moved from monthly to quarterly for the 2020-2021 CHANGES Program contract year, which does not align with a traditional calendar year and starts in June of each year and ends in May. Accordingly, CARE Table 10 activity for July 2021 and CARE Table 11 activity for Q1 (June-August 2021) will be sent by CHANGES and reported in a subsequent report.<sup>27</sup>

---

<sup>26</sup> D.12-12-011 at 40-41 (Ordering Paragraph 9).

<sup>27</sup> SDG&E provides data from the previous month due to reporting delays from CHANGES which prevents SDG&E from reporting current month activity.

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

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

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

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

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

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

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

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

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

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

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

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

**ESA Program** – Table 7 - Second Refrigerator, In-Home Education, MyEnergy/MyAccount Platform

**ESA Program** – Table 8 – Contractor Advanced Funding and Repayment

**CARE Program** - Table 1 - CARE Overall Program Expenses

**CARE Program** - Table 2 - CARE Enrollment, Recertification, Attrition, and Penetration

**CARE Program** - Table 3a - CARE Post-Enrollment Verification Results (Model)

**CARE Program - Table 3b - CARE Post-Enrollment Verification Results (High Usage)**

**CARE Program - Table 4 - Self Certification and Re-Certification**

**CARE Program - Table 5 - Enrollment by County**

**CARE Program - Table 6 - Recertification Results**

**CARE Program - Table 7 - Capitation Contractors**

**CARE Program - Table 8 - Participants as of Month End**

**CARE Program - Table 9 - Expenditures for the CHANGES Pilot**

**CARE Program - Table 10 - CHANGES One-On-One Customer Assistance Sessions**

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

**Energy Savings Assistance Program Table 1 - Expenses  
SDG&E  
July 2021**

Appliances ESA Program:	Authorized Budget [1] [2]			Current Month Expenses [4]			July - December Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
<b>Energy Efficiency</b>	\$ 4,101,510	\$ 3,493,879	\$ 7,595,389									
Appliances			\$ -	\$ 15,608	\$ 3,512	\$ 19,119	\$ 15,608	\$ 3,512	\$ 19,119			
Domestic Hot Water			\$ -	\$ 3,550	\$ 114,795	\$ 118,345	\$ 3,550	\$ 114,795	\$ 118,345			
Enclosure			\$ -	\$ 56,390	\$ 74,750	\$ 131,141	\$ 56,390	\$ 74,750	\$ 131,141			
HVAC			\$ -	\$ 10	\$ 206,653	\$ 206,664	\$ 10	\$ 206,653	\$ 206,664			
Maintenance			\$ -	\$ -	\$ 3,143	\$ 3,143	\$ -	\$ 3,143	\$ 3,143			
Lighting			\$ -	\$ 207,936	\$ -	\$ 207,936	\$ 207,936	\$ -	\$ 207,936			
Miscellaneous			\$ -	\$ 39,654	\$ -	\$ 39,654	\$ 39,654	\$ -	\$ 39,654			
Customer Enrollment			\$ -	\$ 142,203	\$ 142,203	\$ 284,406	\$ 142,203	\$ 142,203	\$ 284,406			
In Home Education			\$ -	\$ 20,682	\$ 20,682	\$ 41,363	\$ 20,682	\$ 20,682	\$ 41,363			
Contractor Advanced Funds [3]			\$ -	\$ (1,557)	\$ (1,557)	\$ (3,115)	\$ (1,557)	\$ (1,557)	\$ (3,115)			
Pilot			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
<b>Energy Efficiency TOTAL [4]</b>	<b>\$ 4,101,510</b>	<b>\$ 3,493,879</b>	<b>\$ 7,595,389</b>	<b>\$ 484,477</b>	<b>\$ 564,180</b>	<b>\$ 1,048,657</b>	<b>\$ 484,477</b>	<b>\$ 564,180</b>	<b>\$ 1,048,657</b>	12%	16%	14%
Training Center	\$ 59,087	\$ 59,087	\$ 118,173	\$ 1,980	\$ 1,980	\$ 3,960	\$ 1,980	\$ 1,980	\$ 3,960	3%	3%	3%
Workforce Education and Training	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Inspections	\$ 39,993	\$ 39,993	\$ 79,985	\$ 6,904	\$ 6,904	\$ 13,808	\$ 6,904	\$ 6,904	\$ 13,808	17%	17%	17%
Marketing and Outreach	\$ 261,564	\$ 261,564	\$ 523,128	\$ 18,017	\$ 18,017	\$ 36,034	\$ 18,017	\$ 18,017	\$ 36,034	7%	7%	7%
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Studies	\$ 105,625	\$ 105,625	\$ 211,250	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance	\$ 69,459	\$ 69,459	\$ 138,918	\$ 10,007	\$ 10,007	\$ 20,013	\$ 10,007	\$ 10,007	\$ 20,013	14%	14%	14%
General Administration	\$ 978,927	\$ 978,927	\$ 1,957,854	\$ 60,362	\$ 60,362	\$ 120,723	\$ 60,362	\$ 60,362	\$ 120,723	6%	6%	6%
CPUC Energy Division	\$ 12,892	\$ 12,892	\$ 25,783	\$ 2,479	\$ 2,479	\$ 4,958	\$ 2,479	\$ 2,479	\$ 4,958	19%	19%	19%
SPOC	\$ 39,300	\$ 39,300	\$ 78,599	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Reallocation (ME&O budget reduced from \$1.2M)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
<b>TOTAL PROGRAM COSTS</b>	<b>\$ 5,668,355</b>	<b>\$ 5,060,724</b>	<b>\$ 10,729,079</b>	<b>\$ 584,225</b>	<b>\$ 663,929</b>	<b>\$ 1,248,154</b>	<b>\$ 584,225</b>	<b>\$ 663,929</b>	<b>\$ 1,248,154</b>	<b>10%</b>	<b>13%</b>	<b>12%</b>
<b>Funded Outside of ESA Program Budget</b>												
Indirect Costs				\$ 40,148	\$ 40,561	\$ 80,709	\$ 40,148	\$ 40,561	\$ 80,709			
NGAT Costs		\$ 144,000	\$ 144,000		\$ 3,006	\$ 3,006		\$ 3,006	\$ 3,006		2%	2%

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

[2] Authorized budget for July-December 2021 reflected in D.21-06.015, Attachment 1 Table 11.

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

[4] Current Month Expenses for Energy Efficiency Total includes July accruals and/or re-accruals of \$341,423 in the following reporting categories: Appliances \$0; Domestic Hot Water \$13,204; Enclosure \$79; HVAC \$21,709; Maintenance \$11,406; Lighting \$89,489; Miscellaneous \$26,894; Customer Enrollment \$148,038; In Home Energy Education \$30,604.

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

**Energy Savings Assistance Program Table 1A - Expenses Funded From 2009-2016 "Unspent ESA Program Funds"**  
**SDG&E**  
**July 2021**

ESA Program [1]:	Authorized Budget			Current Month Expenses			July - December Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
<b>Energy Efficiency</b>												
Multi-Family Common Area Measures [2]	\$ 414,790	\$ 535,210	\$ 950,000	\$ 38,433	\$ 38,433	\$ 76,867	\$ 38,433	\$ 38,433	\$ 76,867	9%	7%	8%
In-Home Education	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Leveraging - CSD [3]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Pilot [4]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Studies [5]	\$ 44,556	\$ 44,556	\$ 89,111	\$ 2,173	\$ 2,173	\$ 4,346	\$ 2,173	\$ 2,173	\$ 4,346	5%	5%	5%
Regulatory Compliance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
General Administration	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
<b>TOTAL PROGRAM BUDGET/EXPENSES</b>	<b>\$ 459,345</b>	<b>\$ 579,766</b>	<b>\$ 1,039,111</b>	<b>\$ 40,606</b>	<b>\$ 40,606</b>	<b>\$ 81,212</b>	<b>\$ 40,606</b>	<b>\$ 40,606</b>	<b>\$ 81,212</b>	<b>9%</b>	<b>7%</b>	<b>8%</b>

[1] Add additional categories if relevant to your utility

[2] The unspent funds remaining at the end of June 30, 2021 is approximately \$5M. SDG&E's Advice Letter 3820-E/3004-G, filed August 2, 2021, reflects the MF CAM projections through July-December 2021 in the amount of \$950,000.

[3] Funding authorized for Programmable Communicating Thermostat (PCT) Pilot.

[4] Refers to budget supporting CSD's LIWP program.

[5] Funding authorized for Rapid Feedback Research and Analysis.

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





**Energy Savings Assistance Program Table 2A  
SDG&E  
July 2021**

Measures	Units	ESA Program - CSD Leveraging					
		Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh[3] (Annual)	kW[3] (Annual)	Therms[3] (Annual)	Expenses (\$)	% of Expenditure
<b>Appliances</b>							
High Efficiency Clothes Washer	Each	-	-	-	-	\$ -	0.0%
Refrigerators	Each	-	-	-	-	\$ -	0.0%
Microwaves [4]	Each	-	-	-	-	\$ -	0.0%
<b>Domestic Hot Water</b>							
Water Heater Blanket	Home	-	-	-	-	\$ -	0.0%
Low Flow Shower Head	Home	-	-	-	-	\$ -	0.0%
Water Heater Pipe Insulation	Home	-	-	-	-	\$ -	0.0%
Faucet Aerator	Home	-	-	-	-	\$ -	0.0%
Water Heater Repair/Replacement	Each	-	-	-	-	\$ -	0.0%
Thermostatic Shower Valve	Each	-	-	-	-	\$ -	0.0%
Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%
Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%
Tub Diverter/ Tub Spout	Each	-	-	-	-	\$ -	0.0%
Thermostat-controlled Shower Valve	Each	-	-	-	-	\$ -	0.0%
<b>Enclosure</b>							
Air Sealing / Envelope [1]	Home	-	-	-	-	\$ -	0.0%
Caulking	Home	-	-	-	-	\$ -	0.0%
Attic Insulation	Home	-	-	-	-	\$ -	0.0%
<b>HVAC</b>							
FAU Standing Pilot Conversion	Each	-	-	-	-	\$ -	0.0%
Furnace Repair/Replacement	Each	-	-	-	-	\$ -	0.0%
Room A/C Replacement	Each	-	-	-	-	\$ -	0.0%
Central A/C replacement	Each	-	-	-	-	\$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	\$ -	0.0%
Duct Testing and Sealing	Home	-	-	-	-	\$ -	0.0%
Energy Efficient Fan Control	Home	-	-	-	-	\$ -	0.0%
Prescriptive Duct Sealing	Home	-	-	-	-	\$ -	0.0%
High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -	0.0%
A/C Time Delay	Home	-	-	-	-	\$ -	0.0%
<b>Maintenance</b>							
Furnace Clean and Tune	Home	-	-	-	-	\$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%
<b>Lighting</b>							
Interior Hard wired LED fixtures	Each	-	-	-	-	\$ -	0.0%
Exterior Hard wired LED fixtures	Each	-	-	-	-	\$ -	0.0%
Torchiere LED	Each	-	-	-	-	\$ -	0.0%
Occupancy Sensor	Each	-	-	-	-	\$ -	0.0%
LED Night Lights	Each	-	-	-	-	\$ -	0.0%
LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	\$ -	0.0%
LED Reflector Bulb	Each	-	-	-	-	\$ -	0.0%
LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	\$ -	0.0%
LED A-Lamps	Each	-	-	-	-	\$ -	0.0%
<b>Miscellaneous</b>							
Pool Pumps	Each	-	-	-	-	\$ -	0.0%
Smart Power Strips - Tier 1	Each	-	-	-	-	\$ -	0.0%
Smart Power Strips - Tier 2	Each	-	-	-	-	\$ -	0.0%
<b>Pilots</b>							
<b>Customer Enrollment</b>							
Outreach & Assessment	Home	-	-	-	-	\$ -	0.0%
In-Home Education	Home	-	-	-	-	\$ -	0.0%
<b>Total Savings/Expenditures</b>							
						\$ -	0.0%
<b>Total Households Weatherized [2]</b>							
<b>CSD MF Tenant Units Treated</b>			<b>Total</b>				

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect [1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

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

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

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

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

Energy Savings Assistance Common Area Measures Program Table 2B

SDG&E  
July 2021

Table 2B ESA Program - Multifamily Common Area Measures <sup>5</sup>								
ESA CAM Measures[1]	Units (of Measure such as "each")	Year-To-Date Completed & Expensed Installation						% of Expenditure
		Quantity Installed	Number of Units for Cap-kBTU <sub>h</sub> and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	
<b>Appliances</b>								
<b>Domestic Hot Water</b>								
Central Boiler**	Cap-kBTU <sub>h</sub>							
Faucet Aerator	Each	3		68	0	-	\$ 23	
Pipe Insulation	Home							
<b>Envelope</b>								
<b>HVAC</b>								
AC Tune-up**	Cap-Tons							
Furnace Replacement**	Cap-kBTU <sub>h</sub>	9		-	-	-	\$ 463	
HEAT Pump Split System**	Cap-Tons							
HEAT Pump Split System	Each							
Programmable Thermostat	Each							
<b>Lighting</b>								
Exterior LED Lighting	Fixture	10		1,110	-	-	\$ 3,844	
Exterior LED Lighting - Pool	Lamp							
Interior LED Exit Sign	Fixture							
Interior LED Fixture	Fixture	156		27,594	6	-	\$ 18,446	
Interior LED Lighting	KiloLumen							
Interior LED Screw-in	Lamp							
Interior TLED Type A Lamps	Lamp	206		7,744	2	-	\$ 2,678	
Interior TLED Type C Lamps	Lamp	62		2,331	1	-	\$ 1,727	
<b>Miscellaneous</b>								
Tier-2 Smart Power Strip	Each							
Variable Speed Pool Pump	Each							
<b>Ancillary Services</b>								
Audit <sup>4</sup>		12					\$ 15,850	
<b>Total</b>		446	-	38,848	9	-	\$ 27,181	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated <sup>2</sup>	1
Subtotal of Master-metered Multifamily Properties Treated	1
Total Number of Multifamily Tenant Units w/in Properties Treated <sup>3</sup>	71
Total Number of buildings w/in Properties Treated	15

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.  
 [2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.  
 [3] All savings are calculated based on the following sources:  
 Savings estimates are sourced from the PY2015 to 2017 ESA Impact Evaluation; Energy Division instructed the IOUs to use these results for 2019 and 2020 savings estimates.  
 [4] Per D.16-11-022 at p.210, the CPUC imposes a cap of 10% on ESA CAM Initiative funds for administrative activities and a ceiling of 20% for direct implementation non-incentive costs.  
 [5] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.  
 \* Note: Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are income eligible based on CPUC income  
 Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.  
 Note: Implementation of the MF CAM Initiative AL 3196-E-A\_2654-G-A was approved effective 5/30/2018.  
 \*\* Note: This represents the unit of measure such as Cap Tons and Cap kBTU<sub>h</sub>. It is not a count of each measure installed or each home the measure was installed in.

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

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

Standard Notes (do not delete)

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

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

2. Only complete if measure is canceled or discontinued

3. Defined as CEC California Building Climate Zones

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

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

<b>Table 3A-1, ESA Program</b>	
Annual kWh Savings	181,475
Annual Therm Savings	463
Lifecycle kWh Savings	1,414,877
Lifecycle Therm Savings	-34,845
Current kWh Rate	\$0.19
Current Therm Rate	\$1.12
Average 1st Year Bill Savings / Treated households	\$14.31
Average Lifecycle Bill Savings / Treated Household	\$93.70

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

<b>Table 3A-3, Summary - ESA Program/CSD Leveraging</b>	
Annual kWh Savings	181,475
Annual Therm Savings	463
Lifecycle kWh Savings	1,414,877
Lifecycle Therm Savings	(34,845)
Current kWh Rate	\$ 0.19
Current Therm Rate	\$ 1.12
Average 1st Year Bill Savings / Treated Households	\$ 14.31
Average Lifecycle Bill Savings / Treated Households	\$ 93.70

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

<b>Table 3B, ESA Program - Multifamily Common Area</b>	
Annual kWh Savings	38,848
Annual Therm Savings	0
Lifecycle kWh Savings	364,306
Lifecycle Therm Savings	0
Current kWh Rate	\$0.19
Current Therm Rate	\$1.12
Average 1st Year Bill Savings / Treated Property	\$7,234.26
Average Lifecycle Bill Savings / Treated Property	\$67,841.74

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

<b>Table 4A-1, ESA Program</b>						
	<b>Eligible Households</b>			<b>Households Treated YTD</b>		
<b>County</b>	<b>Rural [1]</b>	<b>Urban</b>	<b>Total</b>	<b>Rural</b>	<b>Urban</b>	<b>Total</b>
Orange	0	19	19	0	14	14
San Diego	226	4,221	4,447	72	2,236	2,308
<b>Total</b>	<b>226</b>	<b>4,240</b>	<b>4,466</b>	<b>72</b>	<b>2,250</b>	<b>2,322</b>

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

<b>Table 4C, ESA Program - Multifamily Common Area</b>						
	<b>*</b>			<b>Properties Treated YTD</b>		
<b>-</b>				<b>-</b>	<b>-</b>	<b>Total</b>
Orange	-	-	-	-	-	-
San Diego	-	-	-	-	1	1
<b>Total</b>					<b>1</b>	<b>1</b>

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

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

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

**Energy Savings Assistance Program Table 4A-2, Homes Unwilling / Unable to Participate  
SDG&E  
July 2021**

<b>ESA Program</b>		<b>Reason Provided</b>					
<b>County</b>	<b>Customer Unwilling/Declined Program Measures</b>	<b>Customer Unavailable - Scheduling Conflicts</b>	<b>Hazardous Environment (unsafe/unclean)</b>	<b>Landlord Refused to Authorize Participation</b>	<b>Household Exceeds Allowable Limits</b>	<b>Unable to Provide Required Documentation</b>	<b>Other Infeasible/ Ineligible</b>
Orange	15	1	0	0	0	0	6
San Diego	177	358	1	0	73	28	35
<b>Total</b>	<b>192</b>	<b>359</b>	<b>1</b>	<b>0</b>	<b>73</b>	<b>28</b>	<b>41</b>

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

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

<b>Table 5A, ESA Program</b>																		
Month	Gas & Electric				Gas Only			Electric Only			Total							
	# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			(Household Count)		(Annual)			
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW	# of First-Touch	# of Re-treatment	Therm	kWh	kW	
January					-	-	-	-					-			-	-	-
February					-	-	-	-					-			-	-	-
March					-	-	-	-					-			-	-	-
April					-	-	-	-					-			-	-	-
May					-	-	-	-					-			-	-	-
June					-	-	-	-					-			-	-	-
July	2,180	463	166,723	23	-	-	-	-	142	-	14,752	2	2,322	654	1,668	463	181,475	25
August					-	-	-	-					-			-	-	-
September					-	-	-	-					-			-	-	-
October					-	-	-	-					-			-	-	-
November					-	-	-	-					-			-	-	-
December					-	-	-	-					-			-	-	-
<b>YTD</b>	<b>2,180</b>	<b>463</b>	<b>166,723</b>	<b>23</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>142</b>	<b>-</b>	<b>14,752</b>	<b>2</b>	<b>2,322</b>	<b>654</b>	<b>1,668</b>	<b>463</b>	<b>181,475</b>	<b>25</b>

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

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

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

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

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

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

<b>Table 5C, ESA Program - Multifamily Common Area</b>																		
Month	Gas & Electric				Gas Only			Electric Only			Total							
	# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			(Annual)					
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW	Therm	kWh	kW			
January					-	-	-	-					-			-	-	-
February					-	-	-	-					-			-	-	-
March					-	-	-	-					-			-	-	-
April[1]					-	-	-	-					-			-	-	-
May					-	-	-	-					-			-	-	-
June					-	-	-	-					-			-	-	-
July	-	-	-	-	-	-	-	-	1	-	38,848	9	1	-	38,848	9		9
August					-	-	-	-					-			-	-	-
September					-	-	-	-					-			-	-	-
October					-	-	-	-					-			-	-	-
November					-	-	-	-					-			-	-	-
December					-	-	-	-					-			-	-	-
<b>YTD</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1</b>	<b>-</b>	<b>38,848</b>	<b>9</b>	<b>1</b>	<b>-</b>	<b>38,848</b>	<b>9</b>		<b>9</b>

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

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

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

**Energy Savings Assistance Program Table 6 - Expenditures for Pilots and Studies**  
**SDG&E**  
**July 2021**

	Authorized 2021 Funding [1]			Current Month Expenses			July - Decmeber Expenses			% of Budget Expensed		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
<b>Pilots</b>												
Programmable Communicating Thermostat (PCT)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
<b>Total Pilots</b>	\$ -	\$ -	\$ -			\$ -			\$ -	0%	0%	0%
<b>Studies</b>												
Low Income Needs Assessment Study	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Load Impact Evaluation Study	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Equity Criteria and Non Energy Benefits Evaluation (NEB's)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Unallocated Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
2017 Potential and Goals Study	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Rapid Feedback Research and Analysis	\$ 44,556	\$ 44,556	\$ 89,111	\$ 2,173	\$ 2,173	\$ 4,346	\$ 2,173	\$ 2,173	\$ 4,346	5%	5%	5%
<b>Total Studies</b>	\$ 44,556	\$ 44,556	\$ 89,111	\$ 2,173	\$ 2,173	\$ 4,346	\$ 2,173	\$ 2,173	\$ 4,346	5%	5%	5%

[1] Reflects unspent funds remaining at June 30, 2021. [Table 1A]

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



**Energy Savings Assistance Program Table 7 (Second Refrigerators, In-Home Education, MyEnergy/My Account Platform)**

**SDG&E  
July 2021**

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

<b>7B - Households Receiving In- Home Energy Education Only</b>		
<b>Measures</b>	<b>Units</b>	<b>Households that Only Received Energy Education</b>
In-Home Education	Home	75

<b>7C - Households for My Energy/My Account Platform - YTD</b>		
<b>Opt-Out</b>	<b>Already Enrolled</b>	<b>Opt-In</b>
462	358	43

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

		B-C			E x F				(B)-(cumulative H + cumulative I)
	Total Advance Eligible for PPRS Credit [1]	Total Advance Not Eligible for PPRS Credit	Percentage for PPRS Credit Calculation [2]	Total Contractor Invoices each month[3,8]	Total PPRS Credit Earned each month[4]	PPRS Credits Applied each month [5]	Non PPRS Payments Applied each month[6]	Total Advances Outstanding	
Jan-20	\$0			\$ -	\$ -	\$ -	\$ -	\$ -	
Feb-20	\$0			\$ -	\$ -	\$ -	\$ -	\$ -	
Mar-20	\$0			\$ -	\$ -	\$ -	\$ -	\$ -	
Apr-20	\$ 552,731			\$ -	\$ -	\$ -	\$ -	\$ 552,731	
May-20	\$ 411,190			\$ -	\$ -	\$ -	\$ 87,672	\$ 876,249	
Jun-20	\$ 205,120			\$ -	\$ -	\$ -	\$ 53,278	\$ 1,028,091	
Jul-20	\$ -			\$ -	\$ -	\$ -	\$ 33,550	\$ 994,541	
Aug-20	\$ -			\$ -	\$ -	\$ -	\$ 86,720	\$ 907,821	
Sep-20	\$ -			\$ -	\$ -	\$ -	\$ -	\$ 907,821	
Oct-20	\$ -			\$ -	\$ -	\$ -	\$ -	\$ 907,821	
Nov-20	\$ -			\$ -	\$ -	\$ -	\$ -	\$ 907,821	
Dec-20	\$ -			\$ 116,756	\$ 44,731	\$ -	\$ -	\$ 907,821	
Jan-21	\$ -			\$ 268,150	\$ 107,260	\$ -	\$ 20,001	\$ 887,820	
Feb-21	\$ -			\$ 657,155	\$ 204,811	\$ -	\$ 345,244	\$ 542,577	
Mar-21	\$ -			\$ 420,113	\$ 110,655	\$ 48,888	\$ 7,647.01	\$ 486,042	
Apr-21	\$ -			\$ 97,454	\$ 38,982	\$ 10,331	\$ 2,668.48	\$ 473,043	
May-21	\$ -			\$ 159,178	\$ 38,339	\$ -	\$ 1,000.00	\$ 472,043	
Jun-21	\$ -			\$ -	\$ -	\$ 205,120	\$ -	\$ 266,922	
Jul-21	\$ -			\$ -	\$ -	\$ -	\$ -	\$ 266,922	
Aug-21	\$ -			\$ -	\$ -	\$ -	\$ -	\$ 266,922	
Sep-21	\$ -			\$ -	\$ -	\$ -	\$ -	\$ 266,922	
Oct-21	\$ -			\$ -	\$ -	\$ -	\$ -	\$ 266,922	
Nov-21	\$ -			\$ -	\$ -	\$ -	\$ -	\$ 266,922	
Dec-21	\$ -	\$528,535	\$640,506	40%	\$ -	\$ -	\$ -	\$ 266,922	
<b>Total</b>	<b>\$1,169,041</b>	<b>\$528,535</b>	<b>\$640,506</b>	<b>40%</b>	<b>\$ 1,718,806</b>	<b>\$ 544,778</b>	<b>\$ -</b>	<b>\$ 637,780</b>	<b>\$ 531,261</b>

**IOUs - Do not delete footnotes 1-6 below.**

- [1] Contractor labor and labor-related costs. Post-Pandemic Return to Service (PPRS) credit eligible.
- [2] 40% for PPRS credit calculation from Joint Tier 2 Advice Letter 5654-G filed on June 29, 2020.
- [3] For work performed during PPRS credit-earning period for contractors receiving advances. SDG&E PPRS earning period began December 1, 2020.
- [4] Based on total monthly contractor invoices, up to maximum allowable for each contractor. Results may be less than 40% of invoiced due to contractors reaching maximum credit earned.
- [5] Credits may be applied at a later date than earned depending on the contractor repayment schedule. This value should not exceed column G.
- [6] Includes repayments processed for which PPRS credits were not applied, including contractor payments returned unused due to agreement termination or duplicate payments received from other funding sources.
- [7] Advance funding provided to contractors in month occurred.
- [8] Excludes invoices for contractors previously earning full PPRS Credit Eligible amount.

Note: This table created pursuant to section 1.2.3 in Commission Resolution E-5074. This report covers the period from the issuance of advances until the last day of the month reported. Any required corrections/adjustments are reported herein and supersede results reported in prior months.

**CARE Table 1 - CARE Program Expenses  
SDG&E  
July 2021**

CARE Program:	Authorized Budget [1]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Outreach	\$ 2,828,534	\$ 385,709	\$ 3,214,243	\$ 111,241	\$ 15,169	\$ 126,411	\$ 1,055,106	\$ 143,878	\$ 1,198,984	37%	37%	37%
Processing / Certification Re-certification	\$ 497,195	\$ 67,799	\$ 564,994	\$ 62,955	\$ 8,585	\$ 71,540	\$ 418,114	\$ 57,016	\$ 475,129	84%	84%	84%
Post Enrollment Verification [2]	\$ 386,228	\$ 52,668	\$ 438,896	\$ 2,101	\$ 286	\$ 2,387	\$ (27,973)	\$ (3,814)	\$ (31,787)	-7%	-7%	-7%
IT Programming	\$ 985,600	\$ 134,400	\$ 1,120,000	\$ 1,570	\$ 214	\$ 1,784	\$ 208,917	\$ 28,489	\$ 237,406	21%	21%	21%
Cooling Centers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Pilots/CHANGES Program [3]	\$ 233,200	\$ 31,800	\$ 265,000	\$ 1,743	\$ 238	\$ 1,981	\$ 111,191	\$ 15,162	\$ 126,354	48%	48%	48%
Studies [4]	\$ 24,750	\$ 3,375	\$ 28,125	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance	\$ 264,000	\$ 36,000	\$ 300,000	\$ 22,378	\$ 3,051	\$ 25,429	\$ 162,066	\$ 22,100	\$ 184,165	61%	61%	61%
General Administration	\$ 550,000	\$ 75,000	\$ 625,000	\$ 32,151	\$ 4,384	\$ 36,536	\$ 258,296	\$ 35,222	\$ 293,518	47%	47%	47%
CPUC Energy Division [5]	\$ 58,002	\$ 7,909	\$ 65,911	\$ 10,180	\$ 1,388	\$ 11,568	\$ 41,738	\$ 5,692	\$ 47,430	72%	72%	72%
<b>SUBTOTAL MANAGEMENT COSTS</b>	<b>\$ 5,827,509</b>	<b>\$ 794,660</b>	<b>\$ 6,622,169</b>	<b>\$ 244,320</b>	<b>\$ 33,316</b>	<b>\$ 277,636</b>	<b>\$ 2,227,455</b>	<b>\$ 303,744</b>	<b>\$ 2,531,198</b>	<b>38%</b>	<b>38%</b>	<b>38%</b>
CARE Rate Discount [6] [7]	\$ 121,527,000	\$ 23,945,843	\$ 145,472,843	\$ 14,425,079	\$ 1,120,588	\$ 15,545,667	\$ 80,626,301	\$ 12,893,297	\$ 93,519,598	66%	54%	64%
<b>TOTAL PROGRAM COSTS &amp; CUSTOMER DISCOUNTS</b>	<b>\$ 127,354,509</b>	<b>\$ 24,740,503</b>	<b>\$ 152,095,012</b>	<b>\$ 14,669,399</b>	<b>\$ 1,153,904</b>	<b>\$ 15,823,303</b>	<b>\$ 82,853,756</b>	<b>\$ 13,197,040</b>	<b>\$ 96,050,796</b>	<b>65%</b>	<b>53%</b>	<b>63%</b>
Other CARE Rate Benefits												
- DWR Bond Charge Exemption				\$ 724,790		\$ 724,790	\$ 5,073,530		\$ 5,073,530			
- CARE Surcharge Exemption				\$ 910,705	\$ 285,792	\$ 1,196,496	\$ 6,374,933	\$ 2,000,542	\$ 8,375,475			
- California Solar Initiative Exemption				\$ -		\$ -	\$ -		\$ -			
- kWh Surcharge Exemption				\$ 27,214		\$ 27,214	\$ 190,496		\$ 190,496			
- Vehicle Grid Integration Exemption				\$ 81,721		\$ 81,721	\$ 572,046		\$ 572,046			
Total Other CARE Rate Benefits [8] [9]				<b>\$ 1,744,429</b>	<b>\$ 285,792</b>	<b>\$ 2,030,221</b>	<b>\$ 12,211,005</b>	<b>\$ 2,000,542</b>	<b>\$ 14,211,547</b>			
Indirect Costs				\$ 58,966	\$ 8,041	\$ 67,007	\$ 408,420	\$ 55,694	\$ 464,114			

[1] Budget authorized by the Commission in Decision 21-06-015.

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

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

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

[5] Includes increased expenses for Energy Division Staff.

[6] Budget amounts reflected are for CARE Discount totals reflected in Advice Letters 3620-E and 2923-G, effective January 1<sup>st</sup>, 2021.

[7] YTD CARE Discount includes adjustments for the months of January - May, resulting in a total decrease of \$1,737.

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

[9] The July Electric and Gas CARE Rate Benefits are reflected as YTD averages as the actual data was not available at the time of filing. The YTD averages will be updated as soon as the actual data is available.

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

**CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration  
SDG&E  
July 2021**

	New Enrollment										Recertification				Attrition (Drop Offs)				Enrollment		Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)		
	Automatic Enrollment				Self-Certification (Income or Categorical)						Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response <sup>4</sup>	Failed PEV <sup>5</sup>	Failed Recertification <sup>5</sup>	Other	Total Attrition (P+Q+R+S)				Gross (K+O)	Net Adjusted (K-T)
	Inter-Utility <sup>1</sup>	Intra-Utility <sup>2</sup>	Leveraging <sup>3</sup>	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																
January	28	51	0	79	3,939	670	418	115	5,142	5,221	0	588	0	588	0	0	0	3,821	3,821	5,809	1,400	340,213	293,584	116%	
February	11	43	0	54	4,043	720	488	91	5,342	5,396	0	1,234	0	1,236	0	0	0	1,400	1,400	6,632	3,996	342,899	293,584	117%	
March	8	32	0	40	2,156	411	132	49	2,748	2,788	27	1,496	2	1,525	0	0	0	3,364	3,364	4,313	-576	342,412	293,584	117%	
April	0	36	0	36	4,396	565	233	97	5,291	5,327	0	1,375	9	1,384	0	0	1	7,571	7,572	6,711	-2,245	340,167	293,584	116%	
May	0	33	0	33	4,759	484	476	106	5,825	5,858	0	2,989	5	2,994	0	0	0	3,494	3,494	8,852	2,364	342,531	293,584	117%	
June	0	51	0	51	4,525	442	441	104	5,512	5,563	2	2,632	371	3,005	0	0	0	4,283	4,283	8,568	1,280	343,811	293,584	117%	
July	0	46	0	46	4,099	535	312	108	5,054	5,100	199	2,442	775	3,416	0	2	9	6,049	6,060	8,516	-960	342,851	293,584	117%	
August																							293,584	0%	
September																								293,584	0%
October																								293,584	0%
November																								293,584	0%
December																								293,584	0%
<b>YTD Total</b>	<b>47</b>	<b>292</b>	<b>0</b>	<b>339</b>	<b>27,917</b>	<b>3,827</b>	<b>2,500</b>	<b>670</b>	<b>34,914</b>	<b>35,253</b>	<b>228</b>	<b>12,756</b>	<b>1,162</b>	<b>14,148</b>	<b>0</b>	<b>2</b>	<b>10</b>	<b>29,982</b>	<b>29,994</b>	<b>49,401</b>	<b>5,259</b>	<b>342,851</b>	<b>293,584</b>	<b>117%</b>	

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

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

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

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

<sup>5</sup> Pursuant to Resolution M-4849, SDG&E has resumed Recertification and PEV requests as of July 1, 2021.

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

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

**SDG&E  
July 2021**

Month	Total CARE Households Enrolled	Households Requested to Verify <sup>1,5</sup>	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) <sup>2</sup>	Total Households De-enrolled <sup>3</sup>	% De-enrolled through Post Enrollment Verification <sup>4</sup>	% of Total CARE Households De-enrolled
January	340,213	0	0.0%	0	0	0	0.0%	0.0%
February	342,899	0	0.0%	0	0	0	0.0%	0.0%
March	342,412	0	0.0%	0	0	0	0.0%	0.0%
April	340,167	0	0.0%	0	0	0	0.0%	0.0%
May	342,531	0	0.0%	0	0	0	0.0%	0.0%
June	343,811	0	0.0%	0	0	0	0.0%	0.0%
July	342,851	1,494	0.4%	0	4	4	0.3%	0.0%
August			0.0%				0.0%	0.0%
September			0.0%				0.0%	0.0%
October			0.0%				0.0%	0.0%
November			0.0%				0.0%	0.0%
December			0.0%				0.0%	0.0%
<b>YTD Total</b>	<b>342,851</b>	<b>1,494</b>	<b>0.4%</b>	<b>0</b>	<b>4</b>	<b>4</b>	<b>0.3%</b>	<b>0.0%</b>

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

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

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

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

<sup>5</sup> Pursuant to Resolution M-4849, SDG&E has resumed Recertification and PEV requests as of July 1, 2021.

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

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

**SDG&E  
July 2021**

Month	Total CARE Households Enrolled	Households Requested to Verify <sup>1, 5, 6</sup>	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response) <sup>2</sup>	CARE Households De-enrolled (Verified as Ineligible) <sup>2</sup>	Total Households De-enrolled <sup>2,3</sup>	% De-enrolled through Post Enrollment Verification <sup>4</sup>	% of Total CARE Households De-enrolled
January	340,213	0	0.0%	0	0	0	0.0%	0.0%
February	342,899	0	0.0%	0	0	0	0.0%	0.0%
March	342,412	46	0.0%	0	0	0	0.0%	0.0%
April	340,167	6	0.0%	0	0	0	0.0%	0.0%
May	342,531	13	0.0%	0	0	0	0.0%	0.0%
June	343,811	0	0.0%	0	0	0	0.0%	0.0%
July	342,851	5,700	1.7%	0	26	26	0.5%	0.0%
August			0.0%				0.0%	0.0%
September			0.0%				0.0%	0.0%
October			0.0%				0.0%	0.0%
November			0.0%				0.0%	0.0%
December			0.0%				0.0%	0.0%
<b>YTD Total</b>	<b>342,851</b>	<b>5,765</b>	<b>1.7%</b>	<b>0</b>	<b>26</b>	<b>26</b>	<b>0.5%</b>	<b>0.0%</b>

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

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

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

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

<sup>5</sup> Due to COVID-19 Customer Protections effective March 4, 2020 through June 30, 2021, high usage verification requests were discontinued.

<sup>6</sup> Pursuant to Resolution M-4849, SDG&E has resumed Recertification and PEV requests as of July 1, 2021.

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

**CARE Table 4 - CARE Self-Certification and Self-Recertification Applications<sup>1</sup>**  
**SDG&E**  
**July 2021**

	<b>Provided<sup>2</sup></b>	<b>Received</b>	<b>Approved</b>	<b>Denied</b>	<b>Pending/Never Completed</b>	<b>Duplicates</b>
Total (Y-T-D)	1,959	70,502	37,458	4,994	12,114	15,936
Percentage		100%	53%	7%	17%	23%

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

<sup>2</sup> Includes CARE\FERA Applications and Expanded CARE Applications

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

**CARE Table 5 - Enrollment by County  
SDG&E  
July 2021**

County	Estimated Eligible Households <sup>1</sup>			Total Households Enrolled <sup>2</sup>			Penetration Rate		
	Urban	Rural	Total	Urban	Rural <sup>3</sup>	Total	Urban	Rural	Total
Orange	18,944	0	18,944	14,896	0	14,896	79%	0%	79%
San Diego	267,760	6,880	274,640	320,412	7,543	327,955	120%	110%	119%
<b>Total</b>	<b>286,704</b>	<b>6,880</b>	<b>293,584</b>	<b>335,308</b>	<b>7,543</b>	<b>342,851</b>	<b>117%</b>	<b>110%</b>	<b>117%</b>

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

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

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

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

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

Month	Total CARE Households	Households Requested to Recertify <sup>1,5,6</sup>	% of Households Total (C/B)	Households Recertified <sup>2</sup>	Households De-enrolled <sup>3</sup>	Recertification Rate % <sup>4</sup> (E/C)	% of Total Households De-enrolled (F/B)
January	340,213	0	0.0%	0	0	0.0%	0.0%
February	342,899	7	0.0%	0	0	0.0%	0.0%
March	342,412	172	0.1%	8	0	4.7%	0.0%
April	340,167	0	0.0%	0	0	0.0%	0.0%
May	342,531	0	0.0%	0	0	0.0%	0.0%
June	343,811	0	0.0%	0	0	0.0%	0.0%
July	342,851	5,158	1.5%	818	56	1.1%	0.0%
August			0.0%			0.0%	0.0%
September			0.0%			0.0%	0.0%
October			0.0%			0.0%	0.0%
November			0.0%			0.0%	0.0%
December			0.0%			0.0%	0.0%
<b>YTD</b>	<b>342,851</b>	<b>5,337</b>	<b>1.6%</b>	<b>826</b>	<b>56</b>	<b>15.5%</b>	<b>0.0%</b>

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

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

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

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

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

<sup>6</sup> Pursuant to Resolution M-4849, SDG&E has resumed Recertification and PEV requests as of July 1, 2021.

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



**CARE Table 7 - Capitation Contractors<sup>1</sup>**  
**SDG&E**  
**July 2021**

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
211 SAN DIEGO		X			103	591
ALPHA MINI MART	X				-	1
AMERICAN RED CROSS WIC OFFICES		X	X		1	2
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	2
COMMUNITY HOUSING WORKS		X				
COMMUNITY RESOURCE CENTER		X			-	1
HEARTS AND HANDS WORKING TOGETHER		X			-	-
HOME START		X			-	-
HORN OF AFRICA		X			-	-
INTERFAITH COMMUNITY SERVICES		X			-	1
LA MAESTRA FAMILY CLINIC		X			-	1
MAAC PROJECT		X		X	2	6
NEIGHBORHOOD HEALTH CARE	X				-	1
NORTH COUNTY HEALTH SERVICES		X			1	2
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			1	10
SAN YSIDRO HEALTH CENTERS		X			-	1
SCRIPPS HEALTH WIC		X			-	-
VISTA COMMUNITY CLINIC		X			-	-
<b>Total Enrollments</b>					<b>108</b>	<b>619</b>

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

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

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

Month	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households <sup>1</sup>	Penetration	% Change	Total Residential Accounts <sup>2</sup>
January	214,291	0	125,922	340,213	293,584	116%	0.2%	1,356,449
February	216,042	0	126,857	342,899	293,584	117%	0.2%	1,358,455
March	215,946	0	126,466	342,412	293,584	117%	0.2%	1,360,611
April	198,340	0	141,827	340,167	293,584	116%	0.2%	1,359,302
May	199,771	0	142,760	342,531	293,584	117%	0.2%	1,363,082
June	200,687	0	143,124	343,811	293,584	117%	0.2%	1,368,408
July	200,428	0	142,423	342,851	293,584	117%	0.2%	1,372,319
August					293,584	0%	0.0%	
September					293,584	0%	0.0%	
October					293,584	0%	0.0%	
November					293,584	0%	0.0%	
December					293,584	0%	0.0%	
<b>YTD</b>	<b>200,428</b>	<b>0</b>	<b>142,423</b>	<b>342,851</b>	<b>293,584</b>	<b>117%</b>	<b>0.0%</b>	<b>1,372,319</b>

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

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

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

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

2021	Authorized 2021 Budget <sup>2</sup>	Current Month Expenses	Expenses Since Jan. 1, 2021	% of 2021 Budget Expended
	Total	Total	Total	Total
CHANGES Program	\$ 265,000	\$ 1,981	\$ 126,354	48%
<b>Total</b>	<b>\$ 265,000</b>	<b>\$ 1,981</b>	<b>\$ 126,354</b>	<b>48%</b>

<sup>1</sup> Decision 15-12-047 transitioned CHANGES pilot to CHANGES program and funding for the effort is captured herein.

<sup>2</sup> Budget authorized by the Commission in Decision 19-06-022.

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

<b>CARE Table 10 CHANGES One-On-One Customer Assistance Sessions San Diego Gas &amp; Electric</b>	
<b>Reporting Period June 2021[1]</b>	
<b>No. of attendees at education sessions</b>	<b>100</b>
<b>Disputes</b>	
Add Level Pay Plan	0
Arrearage Management Plan (AMP)	0
Assisted with CARE Re-Certification/Audit	0
Changed 3rd party Company/Gas Aggregation	0
Changed 3rd Party Electricity Aggregation	0
Enroll in Energy Assistance Programs	4
High Energy CARE User	0
Medical Baseline Application	0
Payment Extension	0
Payment Plan	0
Request Bill Adjustment	4
Request Customer Service Visit	0
Request Meter Service or Testing	0
Schedule Energy Audit	0
Solar	0
Stop Disconnection	0
Time of Use	0
Wildfire Related Issue	0
<b>Total disputes [3]</b>	<b>8</b>

<b>Needs Assistance</b>	
Add/Remove Level Pay Plan	0
Arrearage Management Plan (AMP)	7
Assisted with CARE Re-Certification/Audit	0
Assisted with Changes to Account	0
Assisted High Energy User with CARE Doc Submission	0
Assisted with Reconnection	0
Billing Language Changed	0
CARE Enrollment	0
COVID-19 Emergency Utility Assistance	6
Consumer Education Only	0
Electricity Aggregation	0
Energy Alerts	0
Energy Efficiency Tool	0
Enrolled in Demand Response Programs	0
ESAP	0
HEAP/LiHEAP	0
Medical Baseline	0
Neighbor to Neighbor	8
Payment Extension	2
Payment Plan	2
Rate Plan Selection Assistance	0
REACH	0
Reported Safety Problem	0
Reported Scam	0
Set Up 3rd Party Notification	0
Set Up New Account	1
Wildfire Related Issue	0
<b>Total Needs Assistance [2]</b>	<b>26</b>

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

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

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

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

[3] Per CHANGES Vendor: The total number of services may exceed the total number of cases because some cases will include more than one service provided.

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

## CARE Table 11 CHANGES Group Customer Assistance Sessions

### SDG&E

2021 [1,2]

Date <sup>3</sup>	Session Language	Description of Service Provided (e.g. utility bill assistance, utility bill dispute resolution, and other energy related issues)	Session Logistics			
			# of Sessions	Length (Hours) <sup>4</sup>	Number of Attendees	Description of Information / Literature Provided
N/A		Avoiding Disconnection	0	N/A	0	CHANGES Ed Handout
N/A		CARE/FERA and Other Assistance Programs	0	N/A	0	CHANGES Ed Handout
N/A		Electronic and Natural Gas Safety	0	N/A	0	CHANGES Ed Handout
N/A		Energy Conservation	0	N/A	0	CHANGES Ed Handout
N/A		Gas Aggregation	0	N/A	0	CHANGES Ed Handout
N/A		High Energy Use	0	N/A	0	CHANGES Ed Handout
N/A		Level Pay Plan	0	N/A	0	CHANGES Ed Handout
N/A		Understanding Your Bill	0	N/A	0	CHANGES Ed Handout
Current Month			0		0	
Year-to-Date			120		1202	

[1] This table was provided by CHANGES contractor, Self Help for the Elderly, via CSID. This table was edited and reformatted from its original version in order to have a more consistent appearance and format with existing SDG&E tables.

[2] As of June 1st, 2020, CHANGES one-on-one data reports have moved from monthly to quarterly for the 2020-2021 program contract year. The data for Q1 June 1, 2021 through August 31, 2021 will be reported once received.

[3] Date of the workshops not available.

[4] Contractor states all sessions last at least 30 minutes.

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