



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

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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 22, 2019)

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

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

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December 21, 2021

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This is the eleventh monthly report for program year (PY) 2021. The purpose of this report is to consolidate activity for the California Alternate Rates for Energy (CARE) Program and Energy Savings Assistance (ESA) Program and provide the California Public Utilities Commission's Energy Division with information to assist in analyzing the low-income programs.¹

This report presents year-to-date ESA Program and CARE Program results and expenditures through November 30, 2021, for San Diego Gas & Electric Company.

Respectfully Submitted,

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¹ Pursuant to Decision (D.) 21-06-015, SDG&E will file monthly Family Electric Rate Assistance (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.



San Diego Gas & Electric Company

Energy Savings Assistance (ESA) Program

And

California Alternate Rates for Energy (CARE)

Program

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ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

1.1. ESA Program Overview

In Guidance Decision (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, 2020.¹ Subsequently, the Commission issued D.20-08-033 to modify certain bridge funding requirements. In compliance with D.20-08-033, SDG&E filed Advice Letter 3612-E/2905-G (ESA Bridge Funding AL) with a proposed ESA Program bridge funding budget and retreatment goal for the January 1, 2021, through June 30, 2021 bridge period.² 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 2021.³ 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.21-06-015.⁴

¹ D.19-06-022 at 12.

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

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

⁴ *Id.*

Additionally, pursuant to OP 148 of D.21-06-015, SDG&E submitted a Tier 1 Advice Letter (AL) to update the ESA Multifamily Common Area Measure (MF CAM) budgets and treatment targets for the remainder of program years 2021 and 2022.⁵ The AL was approved by the Energy Division on September 24, 2021. Accordingly, the ESA MF CAM tables within this report and attached hereto reflect the authorized budget and treatment targets for the remainder of 2021.

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, 2021.⁶ SDG&E is pleased to report that all five ESA contractors who accepted advance payments have earned the full PPRS eligible amounts. Additionally, all contractors have repaid the excess amount of the advance payment used for items not eligible for PPRS credits.

All ESA Program contractors are fully operational. 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, however, there has been an increase in customers selecting to enroll by phone and delaying installation to a later date. In November, less than 1% of enrollments

⁵ SDG&E AL 3820-E/3004-G submitted August 2, 2021 and approved by Energy Division on September 24, 2021.

⁶ 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.

occurred via telephone enrollment efforts. Additionally, SDG&E’s primary O&A contractor continued to be impacted by workforce issues related to COVID-19.

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

ESA Program Summary July through December 2021			
	2021 Authorized / Planning Assumptions⁷	Actual to Date⁸	%
Budget ⁹	\$ 11,768,190	\$ 6,809,812	58%
Homes Treated ¹⁰	5,973	5,666	95%
kWh Saved	N/A	567,141	N/A
kW Demand Reduced	N/A	75	N/A
Therms Saved	N/A	10,581	N/A
GHG Emissions Reduced (Tons)	N/A	374	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.

⁷ 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”.

⁸ The kWh Saved, kW Demand Reduced, and Therms Saved categories do not include savings for ESA CAM.

⁹ The Budget category reflects the authorized budget and actual expenditures for both the ESA Program and ESA CAM.

¹⁰ Total homes treated reflects homes that have been invoiced and paid for the ESA Program. There was no CSD leveraging.

Energy Savings Assistance Program Summary: Additional ESA Budget Reporting for July through December 2021			
	2021 Authorized / Planning Assumptions¹¹	Actual to Date	%
MF CAM Budget	\$ 950,000	\$ 644,258	68%
MF CAM Properties Treated	22	6	27%
kWh Saved	N/A	89,447	N/A
kW Demand Reduced	N/A	20	N/A
Therms Saved	N/A	16,426	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 canvassing efforts to enroll both single-family and multifamily homes. During this reporting month, 457 ESA enrollments were received through canvassing efforts, which is a 19% decrease over the prior month activity, likely due to the workforce issues related to COVID, as discussed earlier. Overall, ESA Program Marketing, Education, and Outreach (ME&O) efforts were successful in creating 3,550 leads and 717 enrollments.

¹¹ The budget and MF CAM Properties Treated reflect SDG&E's ESA CAM budget of \$950,000 and treatment of 22 properties for July through December 2021 per AL 3820-E/3004-G, approved on September 24, 2021. 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".

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In November, 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. Zero properties were treated this month for a total of 22 properties in 2021. In addition, five properties are currently receiving measure installations and seven properties are pending energy assessments/audits. The ESA CAM implementor has reported supply chain issues that have delayed the receipt of some measures and materials, especially high efficiency boilers and HVAC systems, which is hindering the implementor’s ability to close out projects and complete property treatments.

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, one customer was served by the Language Line this month.

Language	Calls
Arabic	1
Total	1

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 532,643 impressions with a Click-Through-Rate (CTR) of 13%. Display ads for November received 1,774,939 impressions with a CTR of 0.01%. Native online advertising had 434,549 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 300 customer assistance messages to an audience of more than 585,000 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

Direct marketing efforts for this reporting month included the following tactics:

Email

SDG&E sent an email to promote the ESA Program to potential customers, which was sent to 24,624 customers with a 31% Open Rate and 3.7% CTR.

Direct Mail

SDG&E sent out 157 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.¹² 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:

¹² THG is a Diverse Business Enterprise (DBE) vendor and a woman-owned business.

The Harris Group	
ESA Leads	1,249
CARE Enrollments	1,127
CARE Recertifications	64

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. The 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:

Energy Solutions Partner Network	
ESA Leads	0
CARE Enrollments	4
CARE Recertifications	0

Partner Spotlight

SDG&E's Customer Outreach and Engagement team participated in 39 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 24,000 people. A few of the outreach events SDG&E participated in are highlighted below.

Pacific Arts Movement

The ten-day San Diego Asian Film Festival, which was hosted by the Pacific Arts Movement organization and ended on November 6, streamed SDG&E messaging regarding CARE, the Arrearage Management Plan (AMP), and other SDG&E programs. The Pacific Arts movement uses media to educate others around culture and played these messages before 130 films in San Diego.

211 Orange County

On November 19, SDG&E Outreach presented to 45 staff members of 211 Orange County, who assist residents of Orange County both in-home and over the phone. This informative presentation educated staff about payment solutions, sustainability, resiliency, scams, and SDG&E's COVID-19 response.

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
11/10/2021	Emergency Rental Assistance Sign Up	SD Labor Council	Robert Eggers Recreation Center
11/17/2021	Operation Gobble	SD Food Bank	Cesar Chavez Park
11/20/2021	District 79 Turkey Giveaway	SD Food Bank	Bay Terraces Senior Center

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 drop box but have yet to reopen in 2021. Customers were urged to contact SDG&E’s CCC or go online to resolve utility issues.

In D.16-06-054, SDG&E received Commission authorization for its CCC 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	24	3
CARE Enrollments	3	2
CARE Recertifications	0	0

1.3. Leveraging Success Evaluation, Including CSD

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

Pursuant to D.20-12-003, SDG&E established the DAC-SASH program and new leveraging efforts with GRID Alternatives (GRID), including annual data sharing of customer information, which includes ESA and CARE Program information.¹³ Additionally, GRID provides SDG&E with ESA leads received from the DAC-SASH program. As a result of discussions at the September 30 Clean Energy Workshop, SDG&E reached out to GRID Alternatives to set up a reoccurring monthly meeting to discuss process improvements and ways to increase leveraging opportunities. In November, SDG&E did not receive any new leads from GRID but has generated 28 leads year-to-date with no ESA Program enrollments.

¹³ D.20-12-003, Appendix A, outlines the requirements for utility data sharing efforts for the DAC-SASH Program.

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. SDG&E meets monthly with SDCWA to discuss leveraging opportunities. During this reporting month, SDG&E did not submit any invoices to SDCWA for water savings measures.

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

SDG&E continues to partner closely with local Low-Income Home Energy Assistance Program (LIHEAP) agencies to improve leveraging opportunities between CSD's LIHEAP and the ESA Program. Both San Diego LIHEAP contractors, MAAC and Campesinos Unidos, continued enrollment efforts. 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 186 leads and enrolled 41 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. This month, SDG&E began plans to develop eight courses highlighting topics from the ESA Program Policy and Procedures Manual, which are all part of a larger learning path called the SDG&E Outreach Textbook. The learning path will be a basic introduction for the ESA Program Outreach and Assessment contractors. SDG&E does not expect to release the additional learning courses and modules until after release of the newest version of the ESA Program Policy and Procedures Manual which will address programmatic changes ordered in D.21-06-015.

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

Pacific Gas and Electric Company (PG&E) is leading a statewide process evaluation of the ESA CAM initiative. Resource Innovations (formerly Nexant) was selected as the consultant. The project commenced on July 29, 2021 and is expected to be completed by June 30, 2022. The study is currently in the data collection phase. During November 2021, Resource

Innovations interviewed program administrators and implementors and drafted process flow documents for primary activities of the program. A draft interim results memo is expected in January 2022.

1.5.2. ESA Program Pilot

SDG&E is not currently conducting any pilots.

ESA Pilot Plus and Pilot Deep

D.21-06-015 directed the IOUs to implement the Pilot Plus and Pilot Deep (Pilot), which will focus on providing customers with deeper energy savings expected to range from 5-50%.¹⁴ Pursuant to Ordering Paragraph 40 of D.21-06-015, the IOUs hosted a workshop on September 27, 2021, to introduce the preliminary implementation plans for the Pilot in coordination with Energy Division staff. On November 19, 2021, SDG&E submitted Advice Letter 3897-E/3037-G which included a Pilot Implementation Plan, stakeholder comments, and SDG&E's responses to those comments.¹⁵

¹⁴ D.21-06-015 Ordering Paragraph (OP) 38

¹⁵ Id OP 41 directs the IOUs to file an advice letter no later than 90 days after the workshop detailing the Pilot Plus and Pilot Deep program implementation plan.

2. CARE EXECUTIVE SUMMARY

2.1. CARE Program Summary

2.1.1. Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget¹⁶	Actual Expenses to Date	% of Budget Spent
Outreach	\$ 3,214,243	\$ 1,941,945	60%
Proc., Certification and Verification	\$ 564,994	\$ 771,840	137%
Post Enrollment Verification ¹⁷	\$ 438,896	\$ (10,664)	-2%
Information Tech./Programming	\$ 1,120,000	\$ 297,951	27%
Pilots-CHANGES	\$ 265,000	\$ 232,102	88%
Studies	\$ 28,125	\$ 19,750	70%
Regulatory Compliance	\$ 300,000	\$ 279,732	93%
General Administration	\$ 625,000	\$ 475,263	76%
CPUC Energy Division Staff	\$ 65,911	\$ 63,341	96%
Cooling Centers ¹⁸	\$ 0	\$ 0	0%
Total Expenses	\$ 6,622,169	\$ 4,071,261	61%
Subsidies and Benefits ¹⁹	\$ 145,472,843	\$ 158,243,918	109%
Total Program Costs and Discounts	\$ 152,095,012	\$ 162,315,179	107%

2.1.2. Provide the CARE Program penetration rate to date.

CARE Penetration		
Participants Enrolled	Eligible Participants²⁰	Penetration Rate
330,449	293,584	113%

¹⁶ CARE budget reflects what was authorized in D.21-06-015 at 472, OP 2.

¹⁷ Negative amount due to reclassification of labor costs within CARE Program from Post-Enrollment Verification category to Processing, Certification, and Verification.

¹⁸ The funding for SDG&E's Cool Zones is no longer under the CARE Program. See D.17-12-009 at Ordering Paragraph 114.

¹⁹ Reflects Subsidies and Benefits as authorized in Advice Letter 3620-E, effective January 1, 2021, and Advice Letter 2923-G, effective January 1, 2021.

²⁰ On February 12, 2021, 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.

2.2. Outreach

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

In November 2021, marketing and outreach efforts contributed to 4,230 completed CARE applications and 3,110 new enrollments/recertifications for the program. Below is a summary of CARE specific outreach efforts.

Direct Marketing

Direct Mail

In November 2021, SDG&E continued the bill comparison campaign by mailing a comparison letter to 2,432 potential CARE customers. The letter compares a customer's average bill to what it would have been had they been enrolled in CARE and 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.

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 101,082 emails, which generated a 47% open rate and a 5% 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 this month, the following numbers were generated by the Capitation Agencies:

Capitation Agencies	
ESA Leads	156
CARE Enrollments	87
CARE Recertifications	0

Cool Zones

The San Diego County Cool Zone program is generally active between May through October of each year. For 2021, the Cool Zone program has ended and will resume in Spring of 2022.

Women’s Infant & Children Organizations

In November 2021, WIC offices were closed to in-person interactions because of COVID-19. At this time, the offices are indefinitely closed to in-person visits. The WIC offices, however, continue to field questions from their clientele via telephone.

County Health and Human Service Agency Collaborative

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. The following applications were received this month:

HHSA	November	YTD
ESA Leads	0	0
CARE Enrollments	64	601
CARE Recertifications	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.

During this reporting month, SDG&E did not receive any customer complaints regarding CARE recertification.

3. CHANGES REPORTING

In compliance with requirements outlined in D.12-12-011,²¹ SDG&E was not provided CARE Table 10 information for the months of October and November 2021 and CARE Table 11 activity for Q2 (September-November 2021). As of June 1, 2020, CARE Table 11 reports have moved from monthly to quarterly, 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 October and November 2021 and CARE Table 11 activity for Q2 (September-November 2021) will be sent by CHANGES and reported in a subsequent report.²²

²¹ D.12-12-011 at 40-41 (Ordering Paragraph 9).

²² SDG&E provides data from the previous month due to reporting delays from CHANGES which prevents SDG&E from reporting current month activity.

4. APPENDIX A – ESA AND CARE PROGRAM TABLES

ESA Program - Table 1 - Program Expenses

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

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

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

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

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

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

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

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

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

ESA Program - Table 6 - Expenditures for Pilots and Studies

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

ESA Program – Table 8 – Contractor Advanced Funding and Repayment

CARE Program - Table 1 - CARE Overall Program Expenses

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

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

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

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

CARE Program - Table 5 - Enrollment by County

CARE Program - Table 6 - Recertification Results

CARE Program - Table 7 - Capitation Contractors

CARE Program - Table 8 - Participants as of Month End

CARE Program - Table 9 - Expenditures for the CHANGES Pilot

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

CARE Program - Table 11 - CHANGES Group Customer Assistance Sessions

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

November 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
Energy Efficiency	\$ 4,101,510	\$ 3,493,879	\$ 7,595,389									
Appliances			\$ -	\$ 25,222	\$ 7,023	\$ 32,245	\$ 212,427	\$ 48,751	\$ 261,178			
Domestic Hot Water			\$ -	\$ 2,539	\$ 82,105	\$ 84,644	\$ 17,461	\$ 564,582	\$ 582,043			
Enclosure			\$ -	\$ 61,934	\$ 82,098	\$ 144,032	\$ 391,653	\$ 519,168	\$ 910,821			
HVAC			\$ -	\$ 3,247	\$ 156,289	\$ 159,536	\$ 58,462	\$ 813,630	\$ 872,092			
Maintenance			\$ -	\$ -	\$ (1,212)	\$ (1,212)	\$ -	\$ 37,009	\$ 37,009			
Lighting			\$ -	\$ 229,591	\$ -	\$ 229,591	\$ 993,807	\$ -	\$ 993,807			
Miscellaneous			\$ -	\$ 26,826	\$ -	\$ 26,826	\$ 155,933	\$ -	\$ 155,933			
Customer Enrollment			\$ -	\$ 137,521	\$ 137,521	\$ 275,043	\$ 523,675	\$ 523,675	\$ 1,047,350			
In Home Education			\$ -	\$ 23,519	\$ 23,519	\$ 47,037	\$ 90,531	\$ 90,531	\$ 181,063			
Contractor Advanced Funds [3]			\$ -	\$ -	\$ -	\$ -	\$ (1,557)	\$ (1,557)	\$ (3,115)			
Pilot			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Energy Efficiency TOTAL [4]	\$ 4,101,510	\$ 3,493,879	\$ 7,595,389	\$ 510,399	\$ 487,343	\$ 997,742	\$ 2,442,393	\$ 2,595,788	\$ 5,038,181	60%	74%	66%
Training Center	\$ 59,087	\$ 59,087	\$ 118,173	\$ 155	\$ 155	\$ 309	\$ 8,312	\$ 8,312	\$ 16,623	14%	14%	14%
Workforce Education and Training	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Inspections	\$ 39,993	\$ 39,993	\$ 79,985	\$ 7,452	\$ 7,452	\$ 14,904	\$ 37,720	\$ 37,720	\$ 75,440	94%	94%	94%
Marketing and Outreach	\$ 261,564	\$ 261,564	\$ 523,128	\$ 37,015	\$ 37,015	\$ 74,029	\$ 142,898	\$ 142,898	\$ 285,795	55%	55%	55%
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Studies [5]	\$ 105,625	\$ 105,625	\$ 211,250	\$ -	\$ -	\$ -	\$ (5,536)	\$ (5,536)	\$ (11,072)	0%	0%	0%
Regulatory Compliance	\$ 69,459	\$ 69,459	\$ 138,918	\$ 6,792	\$ 6,792	\$ 13,584	\$ 41,820	\$ 41,820	\$ 83,640	60%	60%	60%
General Administration	\$ 978,927	\$ 978,927	\$ 1,957,854	\$ 78,502	\$ 78,502	\$ 157,003	\$ 330,412	\$ 330,411	\$ 660,822	34%	34%	34%
CPUC Energy Division	\$ 12,892	\$ 12,892	\$ 25,783	\$ (1,213)	\$ (1,213)	\$ (2,425)	\$ 5,889	\$ 5,889	\$ 11,777	46%	46%	46%
SPOC	\$ 39,300	\$ 39,300	\$ 78,599	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Reallocation (ME&O budget reduced from \$1.2M)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
TOTAL PROGRAM COSTS	\$ 5,668,355	\$ 5,060,724	\$ 10,729,079	\$ 639,102	\$ 616,046	\$ 1,255,147	\$ 3,003,907	\$ 3,157,301	\$ 6,161,208	53%	62%	57%
Funded Outside of ESA Program Budget												
Indirect Costs				\$ 43,394	\$ 43,272	\$ 86,666	\$ 209,457	\$ 210,256	\$ 419,713			
NGAT Costs		\$ 144,000	\$ 144,000		\$ 4,352	\$ 4,352		\$ 43,511	\$ 43,511		30%	30%

[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 November accruals and/or re-accruals of \$740,919 in the following reporting categories: Appliances \$0; Domestic Hot Water \$29,505; Enclosure \$183; HVAC \$47,630; Maintenance \$25,813; Lighting \$193,415; Miscellaneous \$58,157; Customer Enrollment \$320,286; In Home Energy Education \$65,930.

[5] Negative amount due to accrual-reversal for an accrual posted in error in June 2021.

[6] Negative amount due to accrual-reversal.

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
November 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
Energy Efficiency												
Multi-Family Common Area Measures [2]	\$ 414,790	\$ 535,210	\$ 950,000	\$ 14,681	\$ 14,681	\$ 29,363	\$ 322,129	\$ 322,129	\$ 644,258	78%	60%	68%
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	5%	5%	5%
Regulatory Compliance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
General Administration	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
TOTAL PROGRAM BUDGET/EXPENSES	\$ 459,345	\$ 579,766	\$ 1,039,111	\$ 14,681	\$ 14,681	\$ 29,363	\$ 324,302	\$ 324,302	\$ 648,604	71%	56%	62%

[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
November 2021**

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

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

November 2021

Table 2B ESA Program - Multifamily Common Area Measures ⁵								
	Units (of Measure such as "each")	Year-To-Date Completed & Expensed Installation						% of Expenditure
		Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	
ESA CAM Measures[1]								
Appliances								
Domestic Hot Water								
Central Boiler**	Cap-kBTUh	5,317	-	-	-	16,541	\$ 262,619	
Faucet Aerator	Each	5	-	114	0	4	\$ 39	
Pipe Insulation	Home	-	-	-	-	-	\$ -	
Envelope								
HVAC								
AC Tune-up**	Cap-Tons	-	-	-	-	-	\$ -	
Furnace Replacement**	Cap-kBTUh	9	-	-	-	-	\$ 463	
HEAT Pump Split System**	Cap-Tons	-	-	-	-	-	\$ -	
HEAT Pump Split System	Each	16	-	452	0	(0)	\$ 48,199	
Programmable Thermostat	Each	3	-	424	-	31	\$ 908	
Lighting								
Exterior LED Lighting	Fixture	72	-	5,501	-	-	\$ 17,482	
Exterior LED Lighting - Pool	Lamp	-	-	-	-	-	\$ -	
Interior LED Exit Sign	Fixture	-	-	-	-	-	\$ -	
Interior LED Fixture	Fixture	337	-	61,931	14	(56)	\$ 39,731	
Interior LED Lighting	KiloLumen	17	-	396	0	(4)	\$ 1,704	
Interior LED Screw-in	Lamp	22	-	1,305	0	(5)	\$ 310	
Interior TLED Type A Lamps	Lamp	330	-	12,406	3	(46)	\$ 4,290	
Interior TLED Type C Lamps	Lamp	184	-	6,917	2	(41)	\$ 5,124	
Miscellaneous								
Tier-2 Smart Power Strip	Each	-	-	-	-	-	\$ -	
Variable Speed Pool Pump	Each	-	-	-	-	-	\$ -	
Ancillary Services								
Audit ⁴		19	-	-	-	-	\$ 24,936	
Total		6,312	-	89,447	20	16,426	\$ 380,870	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated ²	6
Subtotal of Master-metered Multifamily Properties Treated	3
Total Number of Multifamily Tenant Units w/in Properties Treated ³	336
Total Number of buildings w/in Properties Treated	27

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

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

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

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

[4] Per D.16-11-022 at p.210, the CPUC imposes a cap of 10% on ESA CAM Initiative funds for administrative activities and a ceiling of 20% for direct implementation non-incentive costs.

[5] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.

* Note: Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are income eligible based on CPUC income

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

Note: Implementation of the MF CAM Initiative AL 3196-E-A_2654-G-A was approved effective 5/30/2018.

** Note: This represents the unit of measure such as Cap Tons and Cap kBTUh. It is not a count of each measure installed or each home the measure was installed in.

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

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

Standard Notes (do not delete)

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

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

2. Only complete if measure is canceled or discontinued

3. Defined as CEC California Building Climate Zones

https://www.energy.ca.gov/maps/renewable/building_climate_zones.html

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

Table 3A-1, ESA Program	
Annual kWh Savings	567,141
Annual Therm Savings	10,581
Lifecycle kWh Savings	5,240,039
Lifecycle Therm Savings	20,718
Current kWh Rate	\$0.19
Current Therm Rate	\$1.12
Average 1st Year Bill Savings / Treated households	\$20.13
Average Lifecycle Bill Savings / Treated Household	\$171.23

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

Table 3A-3, Summary - ESA Program/CSD Leveraging	
Annual kWh Savings	567,141
Annual Therm Savings	10,581
Lifecycle kWh Savings	5,240,039
Lifecycle Therm Savings	20,718
Current kWh Rate	\$ 0.19
Current Therm Rate	\$ 1.12
Average 1st Year Bill Savings / Treated Households	\$ 20.13
Average Lifecycle Bill Savings / Treated Households	\$ 171.23

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

Table 3B, ESA Program - Multifamily Common Area	
Annual kWh Savings	89,447
Annual Therm Savings	16,426
Lifecycle kWh Savings	812,763
Lifecycle Therm Savings	329,442
Current kWh Rate	\$0.19
Current Therm Rate	\$1.12
Average 1st Year Bill Savings / Treated Property	\$6,997.92
Average Lifecycle Bill Savings / Treated Property	\$103,808.91

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

Table 4A-1, ESA Program						
	Eligible Households			Households Treated YTD		
County	Rural [1]	Urban	Total	Rural	Urban	Total
Orange	0	19	19	0	44	44
San Diego	226	4,221	4,447	144	5,478	5,622
Total	226	4,240	4,466	144	5,522	5,666

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

Table 4C, ESA Program - Multifamily Common Area						
	*			Properties Treated YTD		
-				-	-	Total
Orange	-	-	-	-	-	-
San Diego	-	-	-	-	6	6
Total					6	6

[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
November 2021**

ESA Program							
Reason Provided							
County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
Orange	97	23	0	0	4	0	46
San Diego	2,101	3,272	2	0	433	165	469
Total	2,198	3,295	2	0	437	165	515

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**

November 2021

Table 5A, ESA Program																		
Month	Gas & Electric				Gas Only			Electric Only			Total							
	# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Household Count)		(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	# of First-Touch	# of Re-treatment	Therm	kWh
January					-	-	-	-				-				-	-	-
February					-	-	-	-				-				-	-	-
March					-	-	-	-				-				-	-	-
April					-	-	-	-				-				-	-	-
May					-	-	-	-				-				-	-	-
June					-	-	-	-				-				-	-	-
July	2,196	463	166,723	23	-	-	-	-	143	-	14,752	2	2,339	664	1,675	463	181,475	25
August	511	1,786	88,064	11	-	-	-	-	29	-	10,009	1	540	197	343	1,786	98,073	13
September	425	1,032	55,268	7	-	-	-	-	13	-	3,396	0	438	180	258	1,032	58,664	8
October	604	5,429	100,432	13	-	-	-	-	69	-	15,825	2	673	285	388	5,429	116,257	15
November	1,578	1,871	102,423	14					98	0	10,249	1.44	1,676	406	1270	1,871	112,672	15
December																		
YTD	5,314	10,581	512,911	68	-	-	-	-	352	-	54,230	7	5,666	1,732	3,934	10,581	567,141	75

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

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

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

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

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

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

Table 5C, ESA Program - Multifamily Common Area																		
Month	Gas & Electric				Gas Only			Electric Only			Total							
	# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)				
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		
January					-	-	-	-				-				-	-	-
February					-	-	-	-				-				-	-	-
March					-	-	-	-				-				-	-	-
April[1]					-	-	-	-				-				-	-	-
May					-	-	-	-				-				-	-	-
June					-	-	-	-				-				-	-	-
July	-	-	-	-	-	-	-	-	1	-	38,848	9	1	-	38,848	9		
August	1	(2)	3,431	1	-	-	-	-	-	-	-	-	1	(2)	3,431	1		
September	1	4,934	12,684	2	-	-	-	-	-	-	-	-	1	4,934	12,684	2		
October	2	11,494	16,821	4	-	-	-	-	1	-	17,662	4	3	11,494	34,483	8		
November	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
December					-	-	-	-				-				-	-	-
YTD	4	16,426	32,937	7	-	-	-	-	2	-	56,510	13	6	16,426	89,447	20		

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
November 2021

	Authorized 2021 Funding [1]			Current Month Expenses			July - December Expenses			% of Budget Expended		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots												
Programmable Communicating Thermostat (PCT)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Total Pilots	\$ -	\$ -	\$ -			\$ -			\$ -	0%	0%	0%
Studies												
Low Income Needs Assessment Study	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Load Impact Evaluation Study	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Equity Criteria and Non Energy Benefits Evaluation (NEB's)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (5,536)	\$ (5,536)	\$ (11,072)	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	5%	5%	5%
Total Studies	\$ 44,556	\$ 44,556	\$ 89,111	\$ -	\$ -	\$ -	\$ (3,363)	\$ (3,363)	\$ (6,726)	-8%	-8%	-8%

[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
November 2021**

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

7B - Households Receiving In- Home Energy Education Only		
Measures	Units	Households that Only Received Energy Education
In-Home Education	Home	168

7C - Households for My Energy/My Account Platform - YTD		
Opt-Out	Already Enrolled	Opt-In
2,881	1,767	182

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

		B-C			E x F				(B)-(cumulative H + cumulative I)
	Total Advanced Amount[7]	Total Advance Eligible for PPRS Credit [1]	Total Advance Not Eligible for PPRS Credit	Percentage for PPRS Credit Calculation [2]	Total Contractor Invoices each month[3,8]	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	\$ -				\$ -	\$ -	\$ -	\$ -	\$ -
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	\$ -				\$ 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	\$ 486,042
Apr-21	\$ -				\$ 97,454	\$ 38,982	\$ 10,331	\$ 2,668	\$ 473,043
May-21	\$ -				\$ 159,178	\$ 38,339	\$ -	\$ 1,000	\$ 472,043
Jun-21	\$ -				\$ -	\$ -	\$ 263,419	\$ -	\$ 208,623
Jul-21	\$ -				\$ -	\$ -	\$ -	\$ 3,115	\$ 205,509
Aug-21	\$ -				\$ -	\$ -	\$ 205,509	\$ -	\$ (0)
Sep-21	\$ -				\$ -	\$ -	\$ -	\$ -	\$ (0)
Oct-21	\$ -				\$ -	\$ -	\$ -	\$ -	\$ (0)
Nov-21	\$ -				\$ -	\$ -	\$ -	\$ -	\$ (0)
Dec-21	\$ -	\$528,535	\$640,506	40%	\$ -	\$ -	\$ -	\$ -	\$ (0)
Total	\$1,169,041	\$528,535	\$640,506	40%	\$ 1,718,806	\$ 544,778	\$ 528,147	\$ 640,895	\$ (1)

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
November 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	\$ 221,283	\$ 30,175	\$ 251,458	\$ 1,709,924	\$ 232,021	\$ 1,941,945	60%	60%	60%
Processing / Certification Re-certification	\$ 497,195	\$ 67,799	\$ 564,994	\$ 60,177	\$ 8,206	\$ 68,383	\$ 680,116	\$ 91,723	\$ 771,840	137%	135%	137%
Post Enrollment Verification [2]	\$ 386,228	\$ 52,668	\$ 438,896	\$ 6,465	\$ 882	\$ 7,346	\$ (9,308)	\$ (1,355)	\$ (10,664)	-2%	-3%	-2%
IT Programming	\$ 985,600	\$ 134,400	\$ 1,120,000	\$ 1,515	\$ 207	\$ 1,721	\$ 262,528	\$ 35,423	\$ 297,951	27%	26%	27%
Cooling Centers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Pilots/CHANGES Program [3]	\$ 233,200	\$ 31,800	\$ 265,000	\$ (11,164)	\$ (1,522)	\$ (12,686)	\$ 204,763	\$ 27,339	\$ 232,102	88%	86%	88%
Studies [4]	\$ 24,750	\$ 3,375	\$ 28,125	\$ 17,380	\$ 2,370	\$ 19,750	\$ 17,380	\$ 2,370	\$ 19,750	70%	70%	70%
Regulatory Compliance	\$ 264,000	\$ 36,000	\$ 300,000	\$ 19,131	\$ 2,609	\$ 21,740	\$ 246,416	\$ 33,316	\$ 279,732	93%	93%	93%
General Administration	\$ 550,000	\$ 75,000	\$ 625,000	\$ 41,512	\$ 5,661	\$ 47,173	\$ 418,694	\$ 56,570	\$ 475,263	76%	75%	76%
CPUC Energy Division [5]	\$ 58,002	\$ 7,909	\$ 65,911	\$ (4,979)	\$ (679)	\$ (5,658)	\$ 55,741	\$ 7,600	\$ 63,341	96%	96%	96%
SUBTOTAL MANAGEMENT COSTS	\$ 5,827,509	\$ 794,660	\$ 6,622,169	\$ 351,320	\$ 47,907	\$ 399,228	\$ 3,586,255	\$ 485,006	\$ 4,071,261	62%	61%	61%
CARE Rate Discount [6] [7]	\$ 121,527,000	\$ 23,945,843	\$ 145,472,843	\$ 11,841,855	\$ 1,466,855	\$ 13,308,711	\$ 140,658,704	\$ 17,585,213	\$ 158,243,918	116%	73%	109%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 127,354,509	\$ 24,740,503	\$ 152,095,012	\$ 12,193,176	\$ 1,514,763	\$ 13,707,939	\$ 144,244,959	\$ 18,070,220	\$ 162,315,179	113%	73%	107%
Other CARE Rate Benefits												
- DWR Bond Charge Exemption				\$ 724,790		\$ 724,790	\$ 7,972,690		\$ 7,972,690			
- CARE Surcharge Exemption				\$ 910,705	\$ 285,792	\$ 1,196,496	\$ 10,017,752	\$ 3,143,709	\$ 13,161,461			
- California Solar Initiative Exemption				\$ -		\$ -	\$ -		\$ -			
- kWh Surcharge Exemption				\$ 27,214		\$ 27,214	\$ 299,350		\$ 299,350			
- Vehicle Grid Integration Exemption				\$ 81,721		\$ 81,721	\$ 898,929		\$ 898,929			
Total Other CARE Rate Benefits [8] [9]				\$ 1,744,429	\$ 285,792	\$ 2,030,221	\$ 19,188,722	\$ 3,143,709	\$ 22,332,431			
Indirect Costs				\$ 64,252	\$ 8,762	\$ 73,014	\$ 666,189	\$ 89,935	\$ 756,125			

[1] Budget authorized in D.21.06.015, Attachment 1 Table 1.

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

[3] Negative amount due to over-estimated accrual from October. 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] Negative amount due to the timing of October accrual and payment of related actual invoice in December. 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 1st, 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 exemption amounts.

[9] The November 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
November 2021**

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)	
	Automatic Enrollment				Self-Certification (Income or Categorical)						Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)				Net Adjusted (K-T)
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																
January	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	1,234	0	0	0	1,400	1,400	6,630	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	4,381	581	233	95	5,290	5,326	0	1,373	8	1,381	0	0	1	7,595	7,596	6,707	-2,270	340,142	293,584	116%	
May	0	33	0	33	4,746	501	475	105	5,827	5,860	0	2,988	5	2,993	0	0	0	3,498	3,498	8,853	2,362	342,504	293,584	117%	
June	1	52	0	53	4,515	455	440	104	5,514	5,567	10	2,629	430	3,069	0	0	0	4,288	4,288	8,636	1,279	343,783	293,584	117%	
July	0	46	0	46	4,103	537	314	106	5,060	5,106	199	2,441	775	3,415	2	2	9	6,061	6,074	8,521	-968	342,815	293,584	117%	
August	0	22	0	22	4,014	326	365	82	4,787	4,809	682	1,984	628	3,294	262	3	37	4,482	4,784	8,103	25	342,840	293,584	117%	
September	0	40	0	40	4,917	678	253	72	5,920	5,960	2,503	2,476	1,081	6,060	3,869	3	177	4,320	8,369	12,020	-2,409	340,431	293,584	116%	
October	1	25	0	26	4,757	948	242	111	6,058	6,084	2,945	2,665	649	6,259	9,621	0	179	3,572	13,372	12,343	-7,288	333,143	293,584	113%	
November	41	17	0	58	4,285	1,082	370	88	5,825	5,883	2,038	2,171	662	4,871	6,335	5	134	2,103	8,577	10,754	-2,694	330,449	293,584	113%	
December	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	293,584	0%	
YTD Total	90	397	0	487	45,856	6,909	3,730	1,018	57,513	58,000	8,404	22,045	4,240	34,689	20,089	13	537	44,504	65,143	92,689	-7,143	330,449	293,584	113%	

¹ Enrollments via data sharing between the IOUs.

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

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

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

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

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

SDG&E

November 2021

6	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
January	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	340,142	0	0.0%	0	0	0	0.0%	0.0%
May	342,504	0	0.0%	0	0	0	0.0%	0.0%
June	343,783	0	0.0%	0	0	0	0.0%	0.0%
July	342,815	1,491	0.4%	1,072	5	1,077	72.2%	0.3%
August	342,840	2,512	0.7%	1,266	3	1,269	50.5%	0.4%
September	340,431	1,558	0.5%	12	4	16	1.0%	0.0%
October	333,143	218	0.1%	3	0	3	1.4%	0.0%
November	330,449	282	0.1%	2	0	2	0.7%	0.0%
December	0	0	0.0%	0	0	0	0.0%	0.0%
YTD Total	330,449	6,061	1.8%	2,355	12	2,367	39.1%	0.7%

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

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

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

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

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

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

SDG&E

November 2021

Month	Total CARE Households Enrolled	Households Requested to Verify ^{1, 5}	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response) ²	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ^{2, 3}	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
January	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	340,142	6	0.0%	0	0	0	0.0%	0.0%
May	342,504	13	0.0%	0	0	0	0.0%	0.0%
June	343,783	0	0.0%	0	0	0	0.0%	0.0%
July	342,815	5,696	1.7%	4,592	49	4,641	81.5%	1.4%
August	342,840	5,377	1.6%	4,502	39	4,541	84.5%	1.3%
September	340,431	2,040	0.6%	1,703	7	1,710	83.8%	0.5%
October	333,143	618	0.2%	194	4	198	32.0%	0.1%
November	330,449	290	0.1%	4	1	5	1.7%	0.0%
December	0	0	0.0%	0	0	0	0.0%	0.0%
YTD Total	330,449	14,086	4.3%	10,995	100	11,095	78.8%	3.4%

¹ Includes all participants who were selected for high usage verification process.

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

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

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

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

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

CARE Table 4 - CARE Self-Certification and Self-Recertification Applications¹
SDG&E
November 2021

	Provided²	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total (Y-T-D)	2,160	84,116	44,644	5,720	15,257	18,495
Percentage		100%	52%	6%	18%	23%

¹ Includes sub-metered.

² 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
November 2021**

County	Estimated Eligible Households ¹			Total Households Enrolled ²			Penetration Rate		
	Urban	Rural	Total	Urban	Rural ³	Total	Urban	Rural	Total
Orange	18,944	0	18,944	14,230	0	14,230	75%	0%	75%
San Diego	267,760	6,880	274,640	309,142	7,077	316,219	115%	103%	115%
Total	286,704	6,880	293,584	323,372	7,077	330,449	113%	103%	113%

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

² Total Households Enrolled includes submeter tenants.

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

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

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

Month	Total CARE Households	Households Requested to Recertify ^{1,5}	% of Households Total (C/B)	Households Recertified ²	Households De-enrolled ³	Recertification Rate % ⁴ (E/C)	% of Total Households De-enrolled (F/B)
January	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	340,142	0	0.0%	0	0	0.0%	0.0%
May	342,504	0	0.0%	0	0	0.0%	0.0%
June	343,783	0	0.0%	0	0	0.0%	0.0%
July	342,815	5,158	1.5%	1,536	3,245	29.8%	62.91%
August	342,840	5,116	1.5%	1,399	3,366	27.3%	65.79%
September	340,431	15,928	4.7%	3,793	2,360	23.8%	14.82%
October	333,143	5,986	1.8%	1,280	136	21.4%	2.3%
November	330,449	5,185	1.6%	648	79	12.5%	1.5%
December	0	0	0.0%	0	0	0.0%	0.0%
YTD	330,449	37,552	11.4%	8,664	9,186	23.1%	2.78%

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

² Data represents total residential electric customers.

³ Includes customers who did not respond or who requested to be de-enrolled.

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

⁵ 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.

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

CARE Table 7 - Capitation Contractors¹
SDG&E
November 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			86	928
ALPHA MINI MART	X				-	1
AMERICAN RED CROSS WIC OFFICES		X	X		-	2
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	3
Community Housing Works		X			-	-
COMMUNITY RESOURCE CENTER		X			-	2
HEARTS AND HANDS WORKING TOGETHER		X			-	1
HOME START		X			-	-
HORN OF AFRICA		X			-	-
INTERFAITH COMMUNITY SERVICES		X			-	1
LA MAESTRA FAMILY CLINIC		X			1	3
MAAC PROJECT		X		X	-	7
NEIGHBORHOOD HEALTH CARE		X			-	1
NORTH COUNTY HEALTH SERVICES	X				-	3
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	10
SAN YSIDRO HEALTH CENTERS		X			-	5
SCRIPPS HEALTH WIC		X			-	-
VISTA COMMUNITY CLINIC		X			-	-
Total Enrollments					87	967

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

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

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

Month	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households ¹	Penetration	% Change	Total Residential Accounts ²
January	214,291	0	125,922	340,213	293,584	116%	0.6%	1,356,449
February	216,042	0	126,857	342,899	293,584	117%	0.8%	1,358,455
March	215,946	0	126,466	342,412	293,584	117%	-0.1%	1,360,611
April	198,337	0	141,805	340,142	293,584	116%	-0.7%	1,347,390
May	199,767	0	142,737	342,504	293,584	117%	0.7%	1,351,192
June	200,685	0	143,098	343,783	293,584	117%	0.4%	1,356,609
July	200,426	0	142,389	342,815	293,584	117%	-0.3%	1,360,628
August	200,543	0	142,297	342,840	293,584	117%	0.0%	1,364,044
September	199,541	0	140,890	340,431	293,584	116%	-0.7%	1,371,181
October	194,932	0	138,211	333,143	293,584	113%	-2.1%	1,376,567
November	193,173	0	137,276	330,449	293,584	113%	-0.8%	1,380,986
December					293,584	0%	0.0%	
YTD	193,173	0	137,276	330,449	293,584	113%	-0.8%	1,380,986

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

² Data represents total residential electric customers.

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

CARE Program Table 9 - Expenditures for Pilots/CHANGES Program¹
SDG&E
November 2021

2021	Authorized 2021 Budget ²	Current Month Expenses	Expenses Since Jan. 1, 2021	% of 2021 Budget Expended
	Total	Total	Total	Total
CHANGES Program	\$ 265,000	\$ (12,686)	\$ 232,102	88%
Total	\$ 265,000	\$ (12,686)	\$ 232,102	88%

1. Decision 15-12-047 transitioned CHANGES pilot to CHANGES program and funding for the effort is captured herein.
2. Budget authorized by the Commission in Decision 21-06-015.
3. Negative amount due to over-estimated accrual from October

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

CARE Table 10 CHANGES One-On-One Customer Assistance Sessions San Diego Gas & Electric Reporting Period 2021[1]	
No. of attendees at education sessions	0
Disputes	
Add Level Pay Plan	0
Arrearage Management Plan (AMP)	0
Assisted with CARE Re-Certification/Audit	0
Assisted with Changing Customer Information on Account	0
Changed 3rd party Company/Gas Aggregation	0
Changed 3rd Party Electricity Aggregation	0
Enroll in Energy Assistance Programs	0
High Energy CARE User	0
Medical Baseline Application	0
Neighbor to Neighbor	0
Payment Extension	0
Payment Plan	0
Request Bill Adjustment	0
Request Customer Service Visit	0
Request Meter Service or Testing	0
Schedule Energy Audit	0
Service Reconnection	0
Solar	0
Stop Disconnection	0
Time of Use	0
Wildfire Related Issue	0
Total disputes [3]	0
Needs Assistance	
Add/Remove Automatic Payments	0
Add/Remove Level Pay Plan	0
Arrearage Management Plan (AMP) Enrollment	0
Arrearage Management Plan (AMP) Follow-Up	0
Assisted Customer with Making a Payment	0
Assisted High Energy User with CARE Doc Submission	0
Assisted with CARE Re-Certification/Audit	0
Assisted with Changes to Account	0
Assisted with Reconnection	0
Billing Language Changed	0
CARE Enrollment	0
COVID-19 Emergency Utility Assistance	0
Consumer Education Only	0
Electricity Aggregation	0
Energy Alerts	0
Energy Efficiency Tool	0
Enrolled in Demand Response Programs	0
ESAP	0
HEAP/LIHEAP	0
Medical Baseline	0
Neighbor to Neighbor	0
Other Payment Assistance (private, faith based, etc.)	0
Payment Extension	0
Payment Plan	0
Rate Plan Selection Assistance	0
REACH	0
Reported Safety Problem	0
Reported Scam	0
Set Up 3rd Party Notification	0
Set Up New Account	0
Wildfire Related Issue	0
Total Needs Assistance [2]	0

Education: Education sessions were held in a mix of one on one, and group sessions. Education materials are available as fact sheets on the CPUC Website: http://consumers.cpuc.ca.gov/team_and_changes/

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

[1] There is a one-month lag behind the current reporting month. The data for October and November 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 November 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 ³	Session Language	Description of Service Provided (e.g. utility bill assistance, utility bill dispute resolution, and other energy related issues)	Session Logistics			
			# of Sessions	Length (Hours) ⁴	Number of Attendees	Description of Information / Literature Provided
N/A		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
Month Total			0		0	
Year-to-Date			154		1,567	

[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 Q2 September 1, 2021 through November 30, 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.