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) Application of Southern California Edison Company (U 338E) for Approval of its Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets for Program Years 2015-2017.	Application 19-11-003 (Filed November 22, 2019)
And Related Matters.	Application 19-11-004 Application 19-11-005 Application 19-11-006 Application 19-11-007

ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2021

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June 1, 2022

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ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2021

This report presents the 2021 program year results and expenditures for the SDG&E California Alternate Rates for Energy (CARE) Program and Energy Savings Assistance (ESA) Program. The purpose of this report is to consolidate activity for the CARE and ESA Programs and provide the California Public Utilities Commission's Energy Division with the necessary information to analyze the low-income programs.[1]

On April 22, 2022, Southern California Edison Company (SCE), on behalf of itself, Southern California Gas Company (SoCalGas) and San Diego Gas & Electric Company (SDG&E) (collectively, the Investor-Owned Utilities or IOUs), requested a 30-day extension until June 1, 2022, to submit the IOUs' respective Low Income Annual Reports for program year 2021. Without the extension, the IOUs' respective Low Income Annual Reports were due on May 1, 2022, in compliance with Decision (D.) 16-11-022, and as modified by D.17-12-009 and

[1] Pursuant to Ordering Paragraph 185 of D.21-06-015, SDG&E will begin filing the Family Electric Rate Assistance (FERA) annual report, combined with this report, beginning in 2023 with the 2022 annual report. SDG&E filed its FERA Annual Report of 2021 results on May 2, 2022.

continued in D.21-06-015. On April 29, 2022, the Commission's Executive Director granted the IOUs' request for extension until June 1, 2022.

Respectfully Submitted,

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June 1, 2022

SAN DIEGO GAS & ELECTRIC COMPANY

ANNUAL REPORT ACTIVITY ON LOW INCOME ASSISTANCE PROGRAMS

2021 RESULTS

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2021 LOW INCOME ANNUAL REPORT EXECUTIVE SUMMARY

In 2021, SDG&E's Low-Income Programs continued to be a critical tool utilized to support and aid customers with overcoming the challenges of the global COVID-19 pandemic. Starting with the unexpected stay-at-home orders, which began in March 2020,[1] SDG&E was able to maintain and prioritize the health and safety of employees, contractors, and customers by adjusting ESA Program operations, increasing awareness and visibility of all programs designed to provide customer assistance through expanded marketing and outreach, and implementing various COVID-19 Emergency Customer Protections, including protections to ensure customers were not removed from receiving the CARE or Family Electric Rate Assistance (FERA) program discount.[2] By year-end, CARE Program enrollments reached 317,040 participants, which is a 108% enrollment rate, and provided much needed financial relief in the amount of $174,824,860 for income-qualified customers who may have suffered unemployment and/or other financial losses as a result of the COVID-19 pandemic.

The COVID-19 pandemic had a substantial impact on ESA Program operations, which rely heavily on in-person and in-home interaction. SDG&E worked with its participating ESA Program contractors to allow virtual enrollments as well as in person enrollments to increase program participation, which were impacted due to customer hesitancy and decreased customer acceptance of in-home services. Additionally, the pandemic caused some delays in the delivery of certain measures, such as furnaces, refrigerators, and doors due to the supply chain issues. In 2021, despite these challenges, SDG&E was successful in exceeding its forecasted goal by treating 13,658 homes.

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[1] *See* Executive Order N-33-22 issued by California Governor Gavin Newsom (dated March 19, 2020).
[2] SDG&E Advice Letter 3516-E-D/2854-G-D implementing COVID-19 emergency customer protections.

To ensure ESA Program workforce stability, in 2020, SDG&E provided monetary advances to ESA Program contractors and offered post-pandemic return to service (PPRS) credits to reduce advance payments balances for those who accepted.[3] On October 30, 2020, SDG&E notified its ESA contractors and Energy Division that the PPRS credit-earning period would begin on December 1, 2020, and end on May 31, 2021.[4] In 2021, SDG&E's ESA contractors who accepted advance payments earned the applicable credits for the full PPRS eligible amounts. Additionally, those applicable contractors have repaid any excess amounts of the advance payment used for items not eligible for PPRS credits.

Additionally, 2021 was the third full year that SDG&E offered its Energy Savings Assistance Common Area Measures (ESA CAM) initiative. In 2021, SDG&E's ESA CAM program conducted 10 audits and treated 22 multifamily projects.

In 2021, SDG&E began working on its Pilot Plus and Pilot Deep pilot (Pilot), which is a Commission-adopted Energy Division staff proposal that focuses on providing customers with deeper household energy savings expected to range from 5-50% (e.g., kWh/household and therms/household).[5] The Pilot is scheduled for contractor go-live in Q4 of 2022.[6]

In 2021, SDG&E began working on the Multifamily Whole Building Program (MFWB) for deed and non-deed restricted multifamily properties. SDG&E is the lead IOU for the Southern MFWB Program for itself, Southern California Gas Company, and Southern California Edison Company. The Southern MFWB Program will provide the multifamily sector services

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[3] Resolution E-5074, dated May 28, 2020.
[4] *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.
[5] Section 6.2.3.2. of D.21-06-015 at 128.
[6] SDG&E Advice Letter 3897-E/3037-G.

for multifamily in-unit, ESA CAM, and multifamily whole building measures. The MFWB Program will begin implementation no sooner than January 1, 2023.[7]

With the continued financial challenges for many customers related to the COVID-19 pandemic, SDG&E's customer assistance marketing campaign continued to be of importance and sought to connect with low-income customers across a diverse population, including hard-to-reach customers, seniors, customers with access and functional needs (AFN), and multilingual/multicultural customers. The campaign drove eligible customers to apply for CARE and, through SDG&E's internal coordination efforts, enrollments were automatically converted into ESA Program leads. In 2021, the Customer Assistance Programs campaign included print, streaming TV, digital media, bill inserts, ethnic marketing, email, and direct mail. This was in addition to Live Call and outreach through SDG&E's Energy Solutions Partner Network and the CARE capitation agencies that help enroll customers in the CARE Program. Additional targeted emails were also added to the campaign to increase awareness of all of SDG&E's customer assistance programs, including direct mentions of the availability of bill relief from the California Department of Community Services and Development's (CSD) Low Income Home Energy Assistance Program (LIHEAP), the statewide Emergency Rental Assistance Program (ERAP) and debt forgiveness through SDG&E's Arrearage Management Program (AMP). SDG&E found great value in leveraging outreach relationships with partners such as CSD and 2-1-1 San Diego. These partnerships demonstrated SDG&E's commitment to utilizing every feasible effort to reach out to customers in need. SDG&E included phone numbers for LIHEAP on SDG&E's CARE applications and program materials so customers could have direct contact information to access services. SDG&E's CARE staff also informed customers about services

[7] OP 123 of D.21-06-015.

offered by CSD and referred customers to CSD for additional bill assistance through LIHEAP. Further, SDG&E's agreement with 2-1-1 San Diego included a directive for referral to LIHEAP agencies Campesinos Unidos, Inc. (CUI) and Metropolitan Area Advisory Committee (MAAC), as appropriate. In 2021, 2-1-1 San Diego handled approximately 75,000 utility-related calls and referred approximately 10,258 of those to the LIHEAP agencies.

In 2021, the Expanded CARE Program successfully served 685 facilities and over 12,000 customers with a bill discount.[8] The Expanded CARE Program utilized targeted and coordinated outreach via SDG&E's skilled and knowledgeable customer team, including assigned account executives, customer contact center representatives, and outreach advisors. These employees worked directly with facilities that may be eligible for Expanded CARE and with Community Based Organizations (CBOs) who work directly with customers who may be eligible.

In Guidance Decision (D.) 19-06-022, the California Public Utilities Commission (CPUC or Commission) authorized California Alternate Rates for Energy (CARE) and Energy Savings Assistance (ESA) Program (collectively, the Low-Income Programs) bridge funding up to the 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.[9] Subsequently, the Commission issued D.20-08-033 to modify certain bridge funding requirements. Furthermore, 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*

[8] The Expanded CARE Program is applicable to non-profit, group-living facilities and agricultural employee housing facilities. See Section 3, below.
[9] D.19-06-022 at 12.

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.[10]

During 2021, in accordance with applicable fund shifting rules, SDG&E shifted a total of $269,994 CARE funds from the Information Technology (IT) Programming category to cover budget overages in the Processing, Certification and Recertification, and California Public Utilities Commission (CPUC or Commission) Energy Division categories.[11] Additionally, SDG&E completed a fund shift to cover a budget shortfall in the ESA program within Energy Efficiency subcategories HVAC-Gas of $862,039 and Lighting of $392,571. See ESA Table 12 which shows the fund shift amounts and categories. There were no ESA Program or CARE Program fund shifting activity that occurred outside of the fund shifting rules.

[10] D.21-06-015 at 472, Ordering Paragraph (OP) 3, and at 490, OP 82.
[11] *See* Decision (D.) 08-11-031, as modified by D.10-10-008, D.16-11-022, D.17-12-009 at pp. 164-166, and D.21-06-015 at 428.

ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY

Summary of 2021 Results

SDG&E's ESA Program offers low-income natural gas and electric customers weatherization services, energy efficient lighting, energy efficient appliances, energy education, and other services at no cost. This report provides information on SDG&E's ESA Program accomplishments and expenditures for program year 2021.

As reported in SDG&E's 2019 Low Income Annual Report, SDG&E achieved what it refers to as the Commission's 2020 Initiative—the long-term policy objective to provide all eligible low-income gas and electric customers an opportunity to participate in the ESA Program by 2020.[12]

For the annual 2021 goal, the Commission authorized an annual treatment goal of 11,946 homes.[13] At the end of 2021, SDG&E had treated 13,658 homes comprised of 4,652 first touches and 9,006 retreatments, or 114% of the 2021 annual treatment goal. ESA Program spending was $14,510,984 or 68% of the authorized 2021 budget spent. Of the forecasted ESA Program energy savings, excluding the ESA CAM initiative, SDG&E achieved 1,317,476 kWh savings, 22,330 therm savings, and 176 kW demand savings.

SDG&E had an initial target to treat 100 properties through the ESA CAM initiative for program years 2017 through 2020.[14] In 2021, SDG&E's ESA CAM initiative continued to offer

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

[13] Energy Division approved SDG&E Advice Letter 3612-E/2905-G for January through June 2021 and D.21-06-015 approved for July through December 2021.

[14] SDG&E Advice Letter 3196-E/2654-G approved by the Energy Division on May 23, 2018 effective May 30, 2018.

ESA CAM to deed restricted multifamily properties, treating 16 properties in the first half of the year and an additional 6 properties for the second half of the year, for a total of 22 multifamily properties treated. SDG&E requested the ESA CAM annual treatment target of 38 for 2021.[15] SDG&E's ESA CAM initiative achieved 84% of its cycle treatment target of 100 properties and 58% of its annual treatment target. SDG&E's ESA CAM initiative fell short in 2021 treatment targets due to COVID-19 pandemic impacts and supply chain issues. SDG&E's implementor for the ESA CAM initiative experienced customer hesitancy during the pandemic as well as supply chain issues that delayed receipt of some measures and materials, specifically high efficiency boilers and heating, ventilation, and air conditioner (HVAC) systems, which hindered the implementor's ability to close out projects and complete property treatments. SDG&E will continue to target and treat ESA CAM multifamily properties in 2022. ESA CAM spending was $1,282,509 or 23% of the authorized 2021 budget spent.[16] ESA CAM energy savings achieved 355,687 kWh savings, 20,560 therm savings, and 74 kW demand savings.

For program year 2021, there was a total of $11,273,565 in unspent ESA Program funds consisting of $6,397,859 of unspent electric funds and $4,875,706 of unspent gas funds.[17] These unspent funds represent 2021 authorized budget minus 2021 expenditures.

The Commission directs the Investor-Owned Utilities (IOUs) to use unspent ESA Program funds to achieve program and policy objectives and to offset future revenue

[15] SDG&E Advice Letter 3196-E/2654-G approved by Energy Division on May 23, 2018 effective May 30, 2018. SDG&E filed Advice Letter 3820-E/3004-G approved by the Energy Division on September 24, 2021 effective August 2, 2021.
[16] *Id.*
[17] Total for main ESA program and MF CAM.

collections.[18] [19] Consistent with this directive, in 2021, SDG&E partially offset its revenue collections by $15,837,309 using ESA Program unspent electric funds of $7,762,167[20] and gas funds of $8,075,142[21].

SDG&E's ESA Program electric and gas balancing accounts is comprised of 2009-2016 unspent funds, plus 2017-2021 unspent funds. The unspent balance as of December 31, 2021 is an overcollection of $25,682,696. In accordance with D.21-06-015, SDG&E has committed electric and gas unspent funds of $4,261,527 for ESA CAM and $64,864 for the Rapid Feedback Study as of December 31, 2021. Therefore, the total remaining unspent and uncommitted funds available in the electric and gas funds to offset future collections as of December 31, 2021 is $21,356,305. See ESA Table 12 in Appendix G.

	As of December 31, 2021		
ESA Program Balancing Accounts Unspent / Overcollected Funds Available	Balancing Account Unspent Overcollection	Unspent / Committed[22]	Unspent / Uncommitted
Electric	$ 14,754,324	$ 2,030,595	$ 12,723,729
Gas	$ 10,928,372	$ 2,295,796	$ 8,632,576
Total funds available to offset future revenue collections	$25,682,696	$ 4,326,391	$21,356,305

[18] D.16-11-022 at Section 5.1.6 ("All current unspent funds shall be utilized to fund program and policy objectives adopted in this decision, and to offset the program collections that would otherwise have been required.") Section 5.1.5 and Section 5.1.6 at 355-358 and Ordering Paragraph 132 of D.17-12-009 and Section 6.15.7.11 at 318 and Ordering Paragraphs 113 and 114 of D.21-06-015.

[19] OP 9 of D. 20-08-033 directed IOUs to prioritize the use of unspent and uncommitted funds before any new revenue collection to fund bridge period activities.

[20] *See* SDG&E Advice Letter 3620-E, effective February 1, 2021 which requested the electric revenue requirement.

[21] *See* SDG&E Advice Letter 2923-G, effective January 1, 2021 which requested the gas revenue requirement.

[22] D.19-06-022 directs the IOUs to use unspent and uncommitted ESA CAM for program year 2021. The unspent funds remaining at the end of December 31, 2020 is $5,544,035, to be used for January-June 2021. D.21-06-015 directs the IOUs to carry-forward all unspent and uncommitted ESA common area measures funding as of June 30, 2021 into the remainder of program year 2021 and 2022. In addition, the budget includes remaining unspent funds for the Rapid Feedback Study efforts which authorized $200,000 for the 2017-2020 program cycle (D.16-11-022 as modified by D.17-12-009).

Procedural Background

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

> [T]he key policy objective for Low Income Energy Efficiency (LIEE) programs, like that of our non-LIEE energy efficiency programs, is to provide cost-effective energy savings that serve as an energy resource and to promote environmental benefits. Concurrently, we retain our commitment to ensuring the LIEE programs add to the participant's quality of life, which implicates equity, energy affordability, bill savings and safety and comfort for those customers who participate in LIEE programs.[23]

To achieve these objectives, the Commission adopted an ESA Program initiative "to provide all eligible LIEE customers the opportunity to participate in LIEE programs and to offer those who wish to participate, all cost-effective energy efficiency measures in their residences by 2020."[24] As previously discussed, SDG&E achieved the first goal at the end of 2019, a full year ahead of schedule.

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

[23] D.07-12-051 at 25.
[24] *Id.* at 28.

rates are implemented."[25] The Commission issued D.17-12-009 which resolved issues in D.16-11-022 for the ESA and CARE Programs through program years 2017 through 2020.

On June 28, 2019, the Commission adopted D.19-06-022 which directed the IOUs to file applications and budgets for the 2021-2026 ESA and CARE programs no sooner than November 4, 2019. D.19-06-022 provided bridge funding covering the period January 1, 2021 through June 30, 2021, subject to Energy Division review and approval of a Tier 1 Advice Letter.

On March 17, 2020, the Commission's Executive Director sent a letter to the California energy, water, and communications corporations stating the Commission's expectation that they would "extend the same applicable consumer protections directed in D.19-07-015" to utility customers retroactive to March 4, 2020.[26]

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

On March 23, 2020, the Executive Director of the Commission sent a letter requesting all IOUs offer a 30-day advance payment to ESA "prime contractors" to help ensure the economic stability of the ESA Program's workforce.[27] On April 7, 2020, the Executive Director of the Commission sent a second letter to the IOUs clarifying guidance with respect to the direction

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[25] D.16-11-022 at 6-7.
[26] March 17, 2020 Letter from Alice Stebbins Re: Emergency Customer Protections to Support Customers Affected by the COVID-19 State of Emergency.
[27] March 23, 2020 Letter from Alice Stebbins Re: Assurances to Energy Savings Assistance (ESA) contractors during the COVID 19 pandemic.

provided in the March 23, 2020 letter, and requesting that all four large IOUs offer a second 30-day advance payment (total of 60 days) to ESA prime contractors.[28]

On April 16, 2020, the Commission adopted Resolution M-4842 to ratify the directions provided in the Commission's Executive Director's March 17, 2020 letter. Resolution M-4842 orders electric, gas, communications, and water and sewer corporations in California to 1) implement the applicable customer protections described in D.19-07-015 (or justify why the protections are not applicable to a pandemic emergency), and 2) file a Tier 2 Advice Letter describing all reasonable and necessary actions to implement emergency customer protections to support California customers. Resolution M-4842 further authorizes the electric, gas, communications, and water and sewer corporations to establish COVID-19 Pandemic Protections Memorandum Accounts (CPPMAs) to track incremental costs associated with complying with the Resolution. Resolution M-4842 highlights the unique impacts associated with the COVID-19 pandemic and mandates that SDG&E offer specific emergency customer protections, where applicable, for "residential and small business customers for up to one year from the date of this Resolution, with the option to extend."[29]

In response to Resolution M-4842, SDG&E submitted Advice Letter 3516-E-D/2854-G-D, which detailed various protections for customers impacted by the COVID-19 pandemic. Among other things, this Advice Letter included protections for CARE and FERA customers to avoid unintended loss of any bill discount during the COVID-19 pandemic. On March 19, 2020, the Commission approved SDG&E Advice Letter 3516-E-D/2854-G-D directing SDG&E to provide COVID-19 Emergency Customer Protections, effective March 4, 2020, through April

[28] April 7, 2020 Letter from Alice Stebbins Re: Follow up Assurances to Energy Savings Assistance (ESA) Contractors During the COVID 19 pandemic.
[29] SDG&E Advice Letter 3516-E-D/2854-G-D at 3 (citing Resolution M-4842 at 4-6 [listing 12 specific mandated actions] and Ordering Paragraph (OP) 5).

16, 2021.[30] The COVID-19 Emergency Customer Protections were subsequently extended to June 30, 2021, pursuant to Resolution M-4849 issued by the Commission on February 12, 2021.

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

On August 27, 2020, the Commission adopted D.20-08-033, which modified Commission D.19-06-022. Among other things, D.20-08-033 modified the 10 percent cap on administrative costs for bridge funding for the ESA Program, directed the IOUs to use unspent and uncommitted funds before new revenue collection to fund the authorized bridge funding, and directed the IOUs to report these funding sources and amounts in their quarterly reporting to the Low Income Oversight Board (LIOB).

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

On June 3, 2021, the Commission adopted D.21-06-015, which approves the applications of the IOUs and sets forth the parameters for the administration of the CARE, the Family Electric Rate Assistance (FERA), and the ESA programs for the 2021-2026 program cycle. Among other things, the Decision approves the Energy Division's ESA program redesign concept on a pilot basis (ESA Pilot Plus and Pilot Deep program); requires the IOUs to establish effective coordination efforts among low income and clean energy programs; approves a new measure mix for the program that focuses on deeper energy savings, while allowing the IOUs flexibility in managing the portfolio by updating the measure mixes through monthly and annual reporting; establishes cost effectiveness guidelines; approves and directs tailored marketing and outreach efforts to reach the program goals, including broadband outreach; approves and directs targeted leveraging efforts to reach the program goals, including with local, state, and federal agencies, water and telecommunication agencies, and other low income programs; establishes a new Northern and Southern multifamily whole building program to include multifamily in-unit and ESA CAM for deed and non-deed restricted properties; establishes an ESA working group to continuously monitor program progress and make recommendations; modifies the fund shifting rules; modifies the administrative cost cap; and directs unspent uncommitted funds to offset revenue collections to avoid large accumulations of unspent funds balances.

1.1 Energy Savings Assistance Program Overview

Provide a summary of the Energy Savings Assistance Program elements as approved in D.16-11-022, D. 17-12-009, and D.21-06-015.

Program Summary[31]			
	2021 Authorized Budget / Forecasted Planning Assumptions[32,33]	**2021 Actual**	**%**
Budget	$27,110,874	$15,837,309	58%
Homes Treated	11,946	13,658	114%
ESA CAM Properties Treated	38	22	58%
kWh Saved	N/A	1,673,163	N/A
kW Demand Reduced	N/A	250	N/A
Therms Saved	N/A	42,890	N/A
GHG Emissions Reduced (Tons)	N/A	1,171	N/A

The financial table above excludes $3,412 of expenditures paid in April 2022 for services related to the 2021 program year due to the timing for the preparation of the 2021 Annual Report.

1.2 Marketing, Education, and Outreach

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

SDG&E understands the importance of segmentation, as it enables SDG&E to target customers and gain insights into barriers and solutions. When organizing SDG&E's residential

[31] Program Summary table combines the budgets, energy savings and demand reduction for both the ESA Program and ESA CAM initiative. Expenditures includes $43,816 in M&E Studies funded from unspent funds.

[32] For 2021, there were no energy savings goals established by the Commission.

[33] *See* SDG&E Advice Letter 3612-E/2905-G, approved and effective on September 23, 2020 which authorized budgets for the first half of 2021 (January-June) and homes treated goal of 5,973, and D.21-06-015, Attachment 1, Table 6 and Table 11 authorizing the 2021 second half budget (July-December) and homes treated goal of 5,973. For MF CAM, SDG&E Advice Letter 3196-E/2654-G approved by Energy Division on May 23, 2018 effective May 30, 2018 and Advice Letter 3820-E/3004-G approved by the Energy Division on September 24, 2021 effective August 2, 2021.

population into detailed profiles of individual segments, there are several ways to describe them – by energy-related attitudes and behaviors, including demographics, energy conservation behaviors, media consumption habits, lifestyle preferences, mobile usage, propensity to engage, and more.[34]

SDG&E used a variety of factors to identify customers more likely to qualify for the ESA Program, which included the most current Athens Research Study[35] and SDG&E's Residential Segmentation model. The purpose of this model was to modernize SDG&E's residential customer segments to account for market changes and ever-changing customer dynamics. This segmentation allowed for targeted messaging to customers with high potential for eligibility. Likewise, the utilization of customer preferred channels of communication enabled SDG&E to drive customer enrollment. As discussed in further detail herein, a series of communication tactics such as direct mail, and outbound calling were deployed to potentially eligible customers within specific neighborhoods.

An example of SDG&E's multi-touch integrated approach is the 2021 ESA Program targeted marketing campaign in which SDG&E sent over 815,000 emails and/or direct mail postcards to currently enrolled and potentially eligible CARE customers, encouraging them to also save through the ESA Program. Following the email and/or postcard, SDG&E provided a canvassing list to ESA Program outreach contractors, providing ESA Program penetration rates and PRIZM code information for each zip code. PRIZM codes are third-party-generated

[34] Customer segmentation from marketing demographic perspective.
[35] Compliance Filing of Pacific Gas & Electric (U 39-M) on Behalf of Itself, Southern California Gas Company (U 904-G), San Diego Gas & Electric Company (U 902-M) and Southern California Edison Company (U 338-E) Regarding Annual Estimates of CARE Eligible Customers and Related Information as reflected in A.19-11-003, et al. Filed on February 12, 2021. Athens Research produces the report that is included as part of this compliance filing. The analysis and subsequent report for this compliance filing is produced by Athens Research.

customer segments based on socioeconomic data. See Appendices A – E for samples of this campaign.

SDG&E continued collaboration with the Energy Solutions Partner Network, which helps educate and enroll customers in low-income programs utilizing a variety of tactics including messaging through email and social media channels; posting information on their websites; providing booth space at events; and hosting enrollment day fairs at their locations. SDG&E strategically identifies CBOs in areas and various pockets within low-income populations throughout its service territory. These areas include harder-to-reach rural, multi-cultural, multi-lingual, and AFN communities.

In 2021, the Energy Solutions Partner Network leveraged both traditional messaging (e-mail, newsletters, direct mail) and social media platforms (Facebook, Twitter, Instagram) to effectively deliver tailored SDG&E program messaging to customers from organizations they trust. SDG&E also worked with these partners to provide education and engagement opportunities at approximately 250 presentations and events throughout its service territory. To adhere to social distancing guidelines due to COVID-19, many of the presentations and events throughout the year were held virtually. To further support customers at events in multicultural/multilingual communities, SDG&E secured bilingual representatives to communicate effectively with non-English speaking customers, who are often part of SDG&E's hardest-to-reach populations. The ability for CBOs to penetrate these harder-to-reach customer segments continues to be valuable in securing enrollments.

SDG&E also coordinated tactics with CBOs to promote the CARE, Family Electric Rate Assistance (FERA), and ESA Programs to customers, which helps reduce the trust barrier with customers and creates more enrollment opportunities. These outreach tactics included

presentations, events, trainings, and messaging to increase awareness and drive enrollments in the ESA Program. As part of the customer engagement outreach plan, SDG&E educated partners with training materials on the ESA Program, including how to utilize the CARE, FERA, and ESA Programs' online application to streamline the enrollment process for their organization.

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

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

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

In 2021, SDG&E built upon the 2020 creative campaign, which focused on communicating ESA and CARE benefits to those who may have lost their job or had a financial hardship due to the COVID-19 pandemic. The campaign ran in English, Spanish, and Asian languages and included TV (general market and streaming), outdoor, digital (including paid search), email, direct mail, and bill inserts. See Appendix A-E of this report for examples.

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

Outreach and Enrollment Strategies: As detailed in the Executive Summary above, SDG&E suspended all non-critical, in-person program activity on March 20, 2020, in response to the COVID-19 pandemic. Statewide, the IOUs suspended program activities during similar timeframes. Further, in April 2020, as directed in Resolution E-5074, SDG&E adjusted ESA enrollment strategies to implement a virtual enrollment process for ESA contractors, which would continue to build a pipeline of eligible customers for the resumption of ESA in-person activities.[36] In 2021, the COVID-19 pandemic continued to impact program implementation, therefore virtual enrollments continued to be offered as an option for program enrollment.

SDG&E's contractors focused efforts primarily on self-certification areas to minimize any data security issues around providing income documentation and gathering customer agreements via email confirmation. However, customers were not excluded from qualifying through income documentation. SDG&E supported these efforts by conducting email campaigns to generate leads for contractors to make follow-up calls. Contractors contacted customers to complete program enrollments, which were offered in English and Spanish. During the call, customers were advised that a subsequent visit would occur to conduct a home assessment and measure installation when the customer was comfortable having contractors visit the home.

In-Home Education Strategies:

In support of virtual enrollment efforts, contractors also provided in-home education as part of the telephone enrollment process. Utilizing statewide program materials and IOU specific inserts, contractors were able to walk customers through the materials over the

[36] Resolution E-5074 at 25.

telephone. Consistent with telephone enrollment efforts, education was provided in English and Spanish. Education materials were also available in Chinese, Vietnamese, Hmong, Korean, and Russian. SDG&E continued to use the Statewide ESA Program energy education booklet, with utility specific inserts utilized for offerings specific to SDG&E for all in-home energy education provided to customers.

Measure Installation/Inspections:

In 2021, SDG&E did not retire or add any measures.

Through the first half of 2021, SDG&E continued to conduct virtual inspections implemented in 2020 in support of COVID-19 restrictions for non-mandatory inspections. SDG&E conducted mandatory furnace and attic insulation inspections in-person, with full in-person inspections resuming mid-year 2021. In total, SDG&E conducted 2,056 inspections in 2021.

1.2.4 Describe Tribal outreach activities, including a summary of the biannual Tribal meetings, and an up-to-date list of Tribal contacts.

In addition to leveraging its two ongoing CBOs partnerships with the Southern California Tribal Chairmen's Association and Southern California American Indian Resource Center, SDG&E's Outreach and Tribal Relations teams worked together to effectively engage and communicate with the 17 federally recognized tribes within its service territory. As part of an ongoing initiative to educate the tribes on available Customer Assistance programs, including ESA, and determine eligibility for tribal members, SDG&E launched an initiative to host presentations with willing tribal governments to review relative program information and provide materials to interested and eligible tribes. To date, SDG&E Outreach has sent requests to meet with all 17 tribes and has met with the seven interested tribes.

D.21-06-015 directs the IOUs to contact each tribe and/or conduct individual meetings with tribes in their territory at least once every 6 months;[37] however, SDG&E plans to continue outreach and collaboration with all interested tribes in its service territory on a quarterly basis.

In accordance with D.21-06-015, SDG&E confirms that it has an up-to-date list of tribal contacts. Due to customer privacy concerns, SDG&E is unable to provide an actual list of contact names as that information is private and not public.

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

AB 793, among other things, directs the IOUs to incorporate energy management technologies into the ESA Program measure offerings. The following ESA Program activities were conducted in 2021 related to energy management technologies and costs:

Energy Education

As part of In-Home Education, contractors are required to offer and walk customers through the My Account enrollment process. To ensure customers are being educated on programs and tools available for them to manage their energy, in 2021, SDG&E provided contractors with a My Account refresher course, which provided step-by-step training in the enrollment process. The training material also included information on My Account features that help customers manage energy bills, including notifications and alerts, energy savings tips and detailed information on time of use (TOU) plans and other pricing plan choices for customers.

[37] D.21-06-015 at 455.

End-Use Load Profiles

D.17-12-009[38] ordered that IOUs contract with a vendor for the purposes of providing customers with disaggregated household usage reports and to make the reports accessible to ESA program contractors. The Decision also stated the efforts should be coordinated with the utilities My Energy/MyAccount Platforms and should be incorporated into the ESA Program's delivery of Energy Education.[39] In 2018, SDG&E conducted a competitive solicitation on behalf of the three electric IOUs and selected Ecotagious, Inc. to provide load disaggregation services for CARE customers.[40]

In 2019, the project team completed the first phase of the project, which consisted of analyzing electric usage for a sample of CARE customers. The work scope for phase two of the project, which spanned 2020, consisted of expanding the phase one analysis to all CARE customers in the three electric IOU service areas.

In July 2020, SDG&E received the first set of reports from the vendor in the form of PDF files, with the second set made available in September 2020. SDG&E began downloading the second set of reports but experienced technical challenges with downloading, housing, and distributing the reports. In April 2021, SDG&E resolved these issues so the reports could be utilized by program contractors. When available, load profiles were uploaded into SDG&E's company database for all scheduled appointments with customers. Contractors were provided the reports for use during the in-home visit as part of the delivery of Energy Education.

SDG&E assessed options for making the Ecotagious load profile reports accessible to customers in its My Account platform; however, this was not possible due to a code freeze on the

[38] D.16-11-002 (as modified by D.17-12-009) at 323-324.
[39] D.16-11-002 (as modified by D.17-12-009) at 173 and 428 (OP 62).
[40] In 2019, Ecotagious was acquired by Uplight, Inc.

My Account system related to SDG&E's Customer Information System (CIS) replacement project, which was completed in 2021. Currently, SDG&E customers have access to load profile data in My Account through SDG&E's current vendor for the Home Energy Report, Opower. The reports provide customers with load profile information based on the customers current usage data. Given that the Ecotagious data was for 2019 and 2020, SDG&E did not included the outdated load profile reports to avoid customer confusion. Using SDG&E's process to provide customers 2021 load profile data through My Account was more relevant to the customer's usage patterns. As SDG&E transitions to the new savings model for treating homes, load profile data will provide additional value in targeting and identifying homes with the opportunity to provide savings to the program.

1.3 Energy Savings Assistance Program Customer Enrollement

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

In 2021, SDG&E enrolled a total of 4,652 first touch customers and 9,006 retreatments. Details regarding homes treated can be found in ESA Table 2 in Appendix G of this report.

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

SDG&E did not implement any new effort to streamline customer enrollment in 2021. SDG&E continued to utilize phone enrollment strategies as a method of enrollment to help mitigate the impact of the pandemic, which continued throughout 2021. Outreach contractors provided the initial customer enrollment over the phone and collected necessary enrollment information from the customer electronically. In 2021, SDG&E enrolled 216 customers through telephone enrollment efforts. Targeted self-certification enrollment strategies (based on PRIZM

codes) are used by SDG&E to conduct target marketing campaigns for customer enrollment and contractors use PRIZM to target canvassing efforts. Additionally, categorical eligibility (enrollment in means tested qualifying programs) is used to simplify the enrollment and data collection process for customer enrollment.

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

In 2021, SDG&E treated 13,658 homes, exceeding the home treated goal of 11,946.

1.4 Disability Enrollment Efforts

1.4.1. Provide a summary of efforts to which the IOU is meeting the 15% enrollment goal.

In 2021, SDG&E conducted outreach efforts with organizations serving individuals with a disability (listed below) to improve ESA Program engagement. Throughout the year, SDG&E partnered with these organizations in over 60 events and presentations reaching over 11,300 customers, most of which were virtual or drive-through food drives. These events and presentations took place to educate CBO staff and volunteers, so they could help those in the community that utilize their services. Additional information about these community organizations and SDG&E's joint outreach efforts can be found in Section 1.4.2 below. SDG&E partnered with the following organizations to better reach individuals with disabilities:

- 211 Orange County
- 211 San Diego
- Access to Independence
- Access Youth Academy
- American Red Cross WIC

- Brazilian Institute for Arts and Culture (BIAC)
- Chula Vista Chamber of Commerce
- Chula Vista Community Collaborative (CVCC)
- City Of San Juan Capistrano Community Center
- City of San Marcos Senior Activity Center
- CREER (Comunidad Y Familia)
- Cystic Fibrosis Foundation
- Deaf Community Services
- ElderHelp of San Diego
- Epilepsy Foundation of San Diego
- Fallbrook Senior Center
- Family Assistance Ministries
- Feeding San Diego
- Foundation For Senior Care
- Hearts and Hands Working Together
- Home Start Inc.
- Horn of Africa
- House of Italy San Diego
- Julian Cuyamaca Resource Center, Inc.
- Kalusugan + Kalakasan Center for Health & Wellness
- La Jolla Community Center
- La Maestra Community Health Centers
- Laguna Niguel Family YMCA

- Lawrence Family Jewish Community Center
- Meals on Wheels San Diego County
- Metropolitan Area Advisory Committee (MAAC)
- Mitchell Thorp Foundation
- Neighborhood House Association (NHA)
- Noah Homes
- North County Health Services
- Peninsula Shephard Center
- Persian Cultural Center
- Ramona Senior Center
- Resounding Joy
- San Diego Center for the Blind
- San Diego Chinese Historical Museum
- San Diego Council on Literacy
- San Diego Futures Foundation
- San Diego Hunger Coalition
- San Diego Regional East County Chamber of Commerce
- San Diego State (SDSU) Research Foundation
- San Diego Unified School District - Cesar Chavez Elementary School
- San Ysidro Health Center
- Scripps Mercy WIC
- Somali Family Service of San Diego
- South Bay Unified School District - Sunnyslope Elementary School

- Southwestern College Foundation
- St. Madeleine Sophie's Center
- The Arc of San Diego
- The Dayle McIntosh Center
- The Vision of Children
- Tricity Food Pantry
- Vista Community Clinic

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

SDG&E's outreach activities are designed to specifically support the needs of customers with disabilities. SDG&E has worked diligently to partner with various CBOs, including non-profit organizations, community clinics, and county/city agencies that provide direct services to this customer segment, providing education and engagement opportunities in support of the ESA Program. Partner segments with outreach activities include:

<u>Hearing & Vision</u>

I. San Diego Center for the Blind

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

II. Deaf Community Services

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

(ASL) interpretation for the internal "See Me, Hear Me," events at SDG&E and has an active Service Agreement with SDG&E to provide interpreter services for key external events.

Mental & Health & Services

Several Energy Solutions Partners offered services supporting individuals with mental health challenges including Home Start and San Ysidro Health Centers. Partners attended SDG&E virtual presentations on residential programs, SDG&E conducted specialized presentations and trainings to partners on CARE, FERA and ESA Programs, and monthly messages were posted on social media.

Senior Centers

Outreach Advisors conducted presentations to the Senior Centers throughout San Diego with information on SDG&E's programs. San Diego Oasis, Ramona Senior Center, and Bayside Community Center, among other partners, attended SDG&E virtual presentations on residential programs and monthly messages were posted on social media.

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

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

For customers with visual impairments, SDG&E has provided large-font printed collateral materials and provides program information booklets in Braille, which include the most up-to-date energy saving tips and resources. We are also prominently promoting these resources on a dedicated landing page for individuals with access and functional needs, which contains enhanced accessibility.

In addition, SDG&E has partnered with several CBOs serving customers with access and functional needs to actively promote the ESA Program. The list of those organizations is in

Section 1.4.1 above. These partners provide customized messaging through email, e-blasts, newsletters, social media posts such as Facebook, Twitter, and Instagram, as well as at events, workshops and trainings with each organization's staff. These efforts led to 6.3% of SDG&E's ESA Program enrollments identified as customers with disabilities for 2021.

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

In 2021, SDG&E's enrollment numbers from the disability community totaled 6.3% of the goal. As detailed above, the COVID-19 pandemic created a barrier to reaching all eligible customers, including customers in the disabled community. Additionally, as in previous years, a challenge with reaching this goal is in part because of the limitations in how identification of a disabled customer takes place during the enrollment process. Customers are not required to provide disability status and often customers are not comfortable doing so. Contractors are reliant on customers to provide disability status or visual indicators, which are not always apparent. However, SDG&E has been making progress in improving the ability to identify customers with disabilities within its databases and will be leveraging these efforts for the 2022 annual reporting period.

As in previous years, SDG&E continued to partner with local organizations serving customers with disabilities and other access and functional needs, such as Deaf Community Services, 2-1-1 San Diego, and others to increase enrollments within its service territory. In addition to leveraging existing partnerships, in 2021, SDG&E Outreach proactively added 13 CBOs to further support and reach customers with a disability.

1.5 Leveraging Success, Including LIHEAP

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

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

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

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

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

As previously mentioned, SDG&E works closely with a network of approximately 200 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. Some of these partners include Women, Infant and Children (WIC) agencies, Catholic Charities, 2-1-1 San Diego, and similar agencies. As part of the intake process, 2-1-1 San Diego enrolls eligible customers in CARE or FERA and offers leads to the ESA Program. Approximately 1,000 leads and 70 customer enrollments were generated through SDG&E's ESA Program partnership efforts in 2021.

SDG&E has also coordinated leveraging efforts between the Solar on Multifamily Affordable Housing (SOMAH) Program and the ESA Program. SDG&E's MF Single Point of

Contact (SPOC) attended SOMAH and IOU Working Group meetings in 2021 and assisted in referring 89 ESA CAM leads to SOMAH, as well as distributing SOMAH collateral during its customer touchpoints. SDG&E received 28 ESA leads from the SOMAH Program Administrator in 2021. The SOMAH Working Group remains focused on the development of an ESA referral template and co-branding opportunities for the future. As directed in D.17-12-009, SDG&E continued its Non-Disclosure Agreement (NDA) with the Single-family Affordable Solar Homes (SASH) Program Administrator, currently GRID Alternatives, to provide lists of owner-occupied single-family households that have completed the ESA Program requirements of the CARE Program high usage process. Additional information regarding this effort is provided in Section 1.6.6 below.

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

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

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

SDG&E partners closely with local LIHEAP agencies to improve leveraging opportunities between CSD's LIHEAP and the ESA Program. SDG&E contracts with the two LIHEAP agencies in San Diego County to provide outreach and assessment services for the ESA

Program. As part of their outreach and enrollment efforts, these agencies can leverage LIHEAP payment assistance customers as leads for ESA Program treatment efforts. In 2021, LIHEAP contractors enrolled 827 customers in the ESA Program (See ESA Table 14 included in Appendix G of this report). This continued effort reduced costs associated with outreach and verification by leveraging the LIHEAP income verification process.

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

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

In 2021, San Diego County Water Authority (SDCWA) and SDG&E continued their longstanding agreement to implement a residential low-income water-energy collaboration. This effort allows SDCWA to augment ESA Program funding for certain measures that save both energy and water, thereby expanding the number of customers served and the amount of energy and water saved. SDG&E and SDCWA leverage outreach opportunities to raise awareness of their respective programs. SDCWA promoted the ESA Program as part of its customer education efforts, while SDG&E included SDCWA water saving educational materials as part of the in-home education process under the ESA Program. In 2021, SDG&E leveraged $55,030 with SDCWA for the installation of water and energy saving measures.

1.6 Integration Success

Per D.08-11-031:

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

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

In 2021 there were no new efforts to integrate and coordinate the ESA program with the CARE Program. SDG&E's online joint CARE/FERA Application is a leveraging tool for the ESA Program, creating ESA Program leads when a customer applies for CARE. Contractors are assigned program leads for customer follow-up. In 2021, over 29,000 leads were created through CARE internet application leveraging efforts, and approximately 3,500 customers were enrolled. Customers enrolling in ESA, but not previously on CARE, can sign up for the CARE Program through the ESA Program agreement forms.

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

Within the residential energy efficiency portfolio, SDG&E attempts to minimize confusion that property owners/managers may have regarding various program participation and eligibility requirements through the MF Single Point of Contact (SPOC). The MF SPOC approach was authorized in D.16-11-022 to provide a one-stop shop for MF property owners and managers[41] and was updated under D.21-06-015[42] to also offer benchmarking and financial services. The MF SPOC continued to leverage leads to SOMAH, ESA and ESA CAM, in

[41] D.16-11-022 at 202.
[42] D.21-06-015 at 504.

addition to evaluating multifamily properties. Internal analytics were used to determine the likelihood of ESA Program eligibility for tenants while also supporting enrollment efforts in SDG&E's bill assistance programs, such as CARE, FERA, and the Medical Baseline Programs. The MF SPOC also offered On-Bill Financing (OBF) and Benchmarking services during customer touchpoints.

The MF SPOC coordinates all common area and in-unit enrollments across low-income and energy efficiency programs, thus creating a seamless and comprehensive whole building approach for the participant. The MF SPOC approach also allows for better visibility and identification of areas for refinements in the programs to improve property owner/manager satisfaction. In 2022, SDG&E plans to continue implementing similar collaboration efforts across other programs to maximize property owner touchpoints being made by program implementers.

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

See Section 1.5.4 describing the current partnership with the SDCWA.

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

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

process for the non-residential energy efficiency offerings and residential programs is the same allowing for a seamless and simplified customer experience.

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

In 2021, ESA Program management reviewed Demand Response (DR) program offerings to ensure contractors were updated with the latest DR offerings. At the time of installation of a smart thermostat, contractors provided customers with information on the current AC Saver Thermostat Program cash back offerings. As a result, in 2021, SDG&E installed 283 smart thermostats, totaling $62,998 in program cost.

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

In compliance with D-20-12-003,[43] SDG&E entered into an NDA with GRID Alternatives, the implementer of the Disadvantage Community – Single Family Solar Homes (DAC-SASH). The Decision required the electric utilities to provide GRID Alternatives with an annual data set of customers to support marketing and outreach efforts for the DAC-SASH program. In March 2021, SDG&E provided GRID Alternatives with the data in compliance with the Decision in accordance with the NDA.

SDG&E also works with GRID Alternatives to enroll customers in the ESA Program based on DAC-SASH program participation. In 2021, GRID Alternatives requested to transition to a semi-annual process for providing leads to SDG&E. SDG&E received a total of 21 leads, however no ESA enrollment resulted from this effort.

[43] OP 2.

In compliance with D.21-06-015,[44] on September 30, 2021, SDG&E participated in the Energy Savings Assistance Program, Clean Energy, and Low-Income program administration workshop. The purpose of the workshop was to identify opportunities to align program eligibility, increase referrals and enrollments, and improve coordination efforts across the various programs. Panelists provided both challenges and opportunities in program integration and data sharing. Short-term, mid-term and long-term goals were presented as next steps in collaboration efforts. As an immediate action, SDG&E established recurring monthly meetings with GRID Alternatives to create more dialogue and identify opportunities for improving program efforts. SDG&E will continue to seek additional opportunities for cross-program alignment, as well as address challenges and opportunities presented at the workshop.

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

In 2021, SDG&E provided GRID Alternatives with the annual data required in compliance with D.20-12-003. GRID Alternatives received 4,200 SDG&E customer profiles and was able to target 2,100 customers via postcards through this effort. GRID Alternatives received fewer than 20 responses and completed one installation.[45] Additionally, GRID Alternatives provided SDG&E with potential ESA Program leads on a bi-annual basis. In 2021, SDG&E received 21 ESA Program leads, which did not result in any program enrollments.

[44] OP 43 of D.21-06-015.
[45] Disadvantage Communities – Single-family Solar Homes (DAC-SASH) Program, Semi-annual Progress report, January 2022.

1.7 Workforce Education & Training

1.7.1 Please summarize efforts to improve and expand Energy Savings Assistance Program workforce education and training. Describe steps taken to hire and train low income workers and how such efforts differ from prior program years.

In 2021, SDG&E's workforce, education, and training (WE&T) classes continued to offer online training due to the COVID-19 pandemic. The WE&T programs remained committed to continuing to provide contractors with learning opportunities through online courses and training opportunities. SDG&E provided email notifications to ESA Program contractors with relevant WE&T courses that may benefit their staff. Contractors can take advantage of classes offered and were encouraged to do so.

In addition to WE&T opportunities, ESA Program specific trainings were conducted in 2021 primarily through the launch of the "Rise" online training platform in September 2021. By October 2021, SDG&E Outreach and Assessment contractors completed two learning modules on the online training platform: (1) My Account Registration Requirement and (2) Customer Service Basics. The My Account Registration Requirement course is composed of four lessons and has an estimated course duration of 30 minutes. It was completed by 30 of the 41 Outreach and Assessment employees. The Customer Service Basics course is composed of 12 lessons and has an estimated course duration of 45 minutes. It was completed by 31 of the 41 Outreach and Assessment employees.

SDG&E continued to make progress in the development of the online training platform for ESA Program contractor education. From November to December 2021, SDG&E began plans to develop eight courses highlighting sections 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.

In 2022, SDG&E plans to expand contractor education to weatherization and NGAT contractors by registering contractors on the "Rise" online platform and providing online, on-demand course options.

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

See above Section 1.7.1 for training conducted.

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

1.7.3 For the ESA Program - Provide the following metrics related to WE&T in support of Commission's effort to increase workforce opportunities for workers in disadvantaged areas.

- **Percent of incentive dollars spent on contracts with a demonstrated commitment to provide career pathways to disadvantaged workers.**

For the ESA Program, SDG&E does not currently track incentive dollars spent on contract(s) demonstrating a commitment to providing career pathways to disadvantaged workers because ESA contracts were already in place and SDG&E anticipated including this requirement in scope for its ESA Program solicitations. Further to this point, SDG&E, in its ESA Program solicitations, requested that bidders include information regarding hiring practices from local and disadvantaged workers, worker training and career-ladder job

development, with associated metrics. SDG&E anticipates collecting and reporting this information as it becomes available.

- **Number of Community Workforce Resources (CWR) participants who have been employed for 12 months after receiving the training. (provide contractors early warning of need for this information)**

SDG&E did not track ESA Program data for CWR participants in 2021. For the Energy Efficiency (EE) Program, SDG&E provides funding to the Lead Program Administrators as shown in Tables 3 and 4 of D.18-05-041.[46] SDG&E receives the proportional benefits from the Statewide Program through the CPUC's CEDARs reporting system. Please refer to the Lead Program Administrators' 2021 Annual Report for the performance of the respective Statewide Program.

- **Percent of total WE&T training program participants that meet the definition of disadvantaged worker.**

SDG&E does not track this metric specific to the ESA Program contractors participating in WE&T Program training. For the EE Program, the percent of the total WE&T training program participants that met the definition of disadvantaged worker in 2021, as tracked in SDG&E's WE&T program customer registration system, is 26.95%.

1.8 Studies

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

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

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

Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern

[46] SDG&E provides information related to the EE Program here and below for informational purposes only.

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

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

The total Joint Utility study budget authorized in D.17-12-009 was $1,500,000.[47] SDG&E's portion of this amount is $225,000 or 15%. Funding for the 2022 LINA study was not included in this amount but was approved in Advice Letters 4132-E (SCE), 5559 (SCG); 3478-E/2828-G (SDG&E), and 4193-G/5718-E (PG&E), all dated December 20, 2019. The total budget allocated to statewide studies, including the 2022 LINA, is $2,000,000 statewide, and SDG&E's portion is $300,000. In addition, SDG&E was authorized $200,000 to spend on "rapid feedback" analysis.[48] The studies active in 2021 are discussed below.

Table 1 provides an overview of the ESA approved studies that were active in 2021. As shown, the three statewide studies active in 2021 include the Non-energy Benefits (NEBs) Assessment, the Low-Income Needs Assessment (LINA), and the Energy Savings Assistance

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

Common Area Measure (ESA CAM) Process Evaluation. Each of these is discussed in more detail below.

Table 1: Active ESA Statewide Studies in 2021

Study Name	Prime Consultant	Contracting IOU	Project Initiation	Project Completion	Statewide Project Budget	SDG&E Portion
NEBs Assessment	APPRISE Inc.	SDG&E	April 2020	January 2021	$149,951	$22,493
LINA	Evergreen Economics	SCE	January 2021	December 2022	$499,410	$74,912
ESA CAM Process Evaluation	Resource Innovations	PG&E	August 2021	June 2022	$248,085	$40,433

ESA Non-Energy Benefits Study

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

On November 25, 2020 APPRISE Inc. delivered the draft report and Excel tool. The draft report was posted for stakeholder review on December 21, 2020. A webinar took place on January 6, 2021 to present the results of the study. The study report was finalized in January 2021.

Rapid Feedback Local Research

The Rapid Feedback budget that was approved in OP 51 of Attachment A to D.17-12-009 and was used to fund the APPRISE Inc. Non-Energy Benefits Assessment and the ESA CAM study described above. In addition, it was used to provide a third-party Normalized Metered Energy Consumption (NMEC) analysis of the ESA CAM program provided in Section 1.12.3.

Statewide Low-Income Needs Assessment (LINA) Study

The LINA is a mandated study required to be completed every three years per Assembly Bill (AB) 327 and Public Utilities Code (P.U. Code) Section 382(d). Authorization for this 2022 LINA Study (named for the year of completion) was provided on January 19, 2020 in response to SDG&E's Advice Letter 3478-E and 2828-G requesting the use of unspent funds to initiate the 2022 LINA. After a competitive solicitation conducted by SCE, the project was awarded to Evergreen Economics at the end of 2020. The 2022 LINA is focused on understanding the energy needs of California's large low-income renter population, including those living in single-family homes and different types of multifamily properties. In particular, the study will (a) identify renter needs addressed or not addressed by the program; (b) identify needs among specific sub-groups of renters; (c) outline program, policy, and market barriers with potential solutions to serving the rental market; and (d) as appropriate, recommend how ESA may better assist renters with the bill savings and/or ameliorate Health/Comfort/Safety (HCS) hardships.

A public workshop was held in March 2021 to present the draft research plan and solicit public comments. The research plan was finalized in April 2021. Interviews with 12 ESA program contractors and CBOs were conducted in May and June 2021 to gain insight into the energy needs of low-income renters and households that do not speak English or Spanish and to inform a large-scale telephone survey of renters. The telephone survey instrument was drafted and revised over several months. The survey launched in November 2021 across the IOU territories, but participation rates were lower than expected. To mitigate this issue, the study consultant sent out a letter in advance to pre-selected survey participants and provided customers with a $25 gift card after survey completion. The incentive and revised outreach strategy proved to be effective and resulted in a steady uptake in survey completions. The survey continued

through first quarter 2022. The remainder of the project will include interviews with selected customers, analysis, and a written report. The study is on track to be completed by December 2022.

ESA Multi-Family Common Area Measure Process Evaluation

A process evaluation for the ESA-CAM Initiative commenced in July 2021 with Resource Innovations, Inc. as the selected consultant. The study has the following objectives: 1) assess the relative effectiveness of current ESA-CAM outreach, delivery, and implementation strategies; 2) identify data needed to facilitate more reliable evaluations of program impacts; and 3) inform future program designs targeting the income-qualified MF sector.

A stakeholder workshop was held in September 2021 to present the draft research plan and solicit feedback from stakeholders. Comments were incorporated to produce the final research plan, which was posted publicly along with comment responses. During the final quarter of 2021, the consultant reviewed the program and conducted interviews with IOU program administrators, implementers, and the SPOC representatives to inform evaluation findings and program process improvements.

In December 2021, the consultant produced process flow diagrams and created first drafts of the program logic models, along with an interim findings memo. The second stakeholder public workshop took place February 2022 to share interim findings and gather feedback from stakeholders midway through the project.

The remaining tasks for the process evaluation include participant surveys and in-depth interviews, creating customer journey maps, and identifying data elements needed to support an impact evaluation. The study is expected to be completed by the third quarter of 2022, following

a third stakeholder workshop to present overall study findings and the publication of a final report.

ESA Non-Energy Benefits Study

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

On November 25, 2020 APPRISE Inc. delivered the draft report and Excel tool. The draft report was posted for stakeholder review on December 21, 2020. A webinar took place on January 6, 2021 to present the results of the study. The study report was finalized in January 2021.

Rapid Feedback Local Research

The Rapid Feedback budget that was approved in OP 51 of Attachment A to D.17-12-009 and was used to fund the APPRISE Inc. Non-Energy Benefits Assessment and the ESA CAM study described above. In addition, it was used to provide a third-party Normalized Metered Energy Consumption (NMEC) analysis of the ESA CAM program provided in Section 1.12.3.

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

The only study completed in 2021 was the Non-Energy Benefits (NEBs) assessment conducted by APPRISE, Inc. and a summary is included below.

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

The study successfully addressed all the objectives. The final report documented reasons for either including or omitting each of the 46 proposed NEBs from the 2019 Study. For the NEBs that remained, data sources and calculations were updated and improved. The results of this study reduced the uncertainty in the NEB calculations, verified, and in some cases, improved the data sources, recommended a simplified measure allocation method, and created a simplified Excel tool. It is important to recognize that the NEB values remain imprecise estimates and additional primary research is recommended. For example, some of the inputs taken from secondary data are still from older studies of programs not fully representative of California's climate and program offerings. In addition, many of the NEBs are estimated as a function of average energy bill savings. While it may not be ideal for NEB estimates to be dependent on savings, alternate methods were not available at this time. The final report can be found at: https://pda.energydataweb.com/api/view/2471/Final%20CA%20ESA%20NEB%20Report%201-25-21_.pdf.

1.9 Pilots

1.9.1 For each Pilot, provide 1) a summary describing the activities undertaken in the study since its inception;2) the study progress, problems encountered, ideas on solutions; 3) the activities anticipated in the next quarter and the next year; and 4) Status of Pilot Evaluation Plan (PEP).

The ESA Pilot Plus and Pilot Deep Program (Pilot) is the Commission's Energy Division Staff Proposal to yield deeper home energy savings with energy savings targets expected between 5% to 50%. The Pilot provides more advanced energy savings measures tailored to customer needs that complement and build upon the ESA Main Program measure packages. The Pilot Plus package will provide and/or replace certain equipment and appliances plus load shifting and electrification measures that will seek to reduce annual energy usage by 5 to 15%. The Pilot Deep package will offer more advanced measures that will seek to reduce annual energy usage by 15 to 50%.

On November 19, 2021, SDG&E filed Advice Letter 3897-E/3037-G, which provided details regarding the Pilot workshop held in September 2021 and SDG&E's Pilot implementation plan. SDG&E's Advice Letter was approved on January 12, 2022. SDG&E's solicitation for a Pilot implementer is ongoing as of the date of this report. SDG&E expects to launch the Pilot with contract signatures by the beginning of Quarter 3 of 2022. The contractor "go-live" will likely not occur until the fourth quarter of 2022.

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

SDG&E did not have any operational pilots during the 2021 ESA Program year. The ESA Program Pilot Plus and Pilot Deep solicitation and implementation are expected to occur in 2022.

1.10 Low-Income Working Groups

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

D.21-06-015 directed the formation of the Energy Savings Assistance Working Group (ESA WG) and the ESA/CARE Study Working Group. The 2021 Working Group activities are summarized below.

ESA Working Group

Formation of the Energy Savings Assistance Working Group (ESA WG) was directed in D.21-06-015. Responsibilities of the ESA WG include updating ESA Program Policy and Procedures and Installation Manuals, recommending program revisions including updates to ESA measures, reviewing cost effectiveness test considerations, making changes to ESA program goals as necessary, and exploring potential development of a Universal Application System (UAS).

D.21-06-015 states:

> "We approve the formation of the ESA WG and add to this group's role work areas including but not limited to all mid cycle issues, energy education, multifamily, and the UAS work directed in this decision. Consistent with the formation of the ESA/CARE Study Working Group, membership shall comprise of the IOUs' representatives, Energy Division staff, and no more than two representatives from each segment of the following interest groups: contractors, CBOs, Cal Advocates, consumer protection/advocates, and other special interest groups (as applicable to the subject and agreed to by the previously indicated members). Representatives shall have expertise in the issues relating to the working group's purpose and tasks and are expected to contribute significantly to the progress and resolution of the tasks; those that do not may be removed or replaced. We note that the working group representatives do not have to always be the same people as they can be interchanged based on the subject matter and level of expertise. However, we require the working group to adhere to the number of allowed representatives from each party/segment to ensure that the size of the group is manageable for the deliverables expected. Too large of a group may hinder such progress. In convening the working group, the IOUs are encouraged to consider the California Energy Efficiency Coordinating Committee (CAEECC) rules and processes, where applicable. The ESA WG will begin meeting at least once a quarter, starting no later than the beginning of 2022."[49]

The ESA WG is consensus-based and managed by the IOUs through their hired facilitator. The ESA WG will be responsible for providing greater transparency of ESA technical issues, updating the Statewide ESA Policies and Procedures Manual and the Statewide ESA Installation Standards Manual, and recommending program revisions or changes to program goals as necessary. The ESA WG is also tasked to discuss and make recommendations regarding the potential design and development of a universal application system (UAS) allowing multiple registration pathways for CARE/FERA/ESA, the sharing of application information, and the sharing of energy usage information. Finally, the ESA WG is tasked to evaluate and provide recommendations on how to increase overall program cost effectiveness as well as help facilitate

[49] D.21-06-015 at 413.

the non-energy benefit (NEB) study plan process for the other Working Group directed by D.21-06-015, the ESA/CARE Studies Working Group.

In 2021, PG&E worked with Energy Division and the other IOUs to establish the ESA WG. On November 10, 2021, PG&E sent an email to the A.19-11-003 et al. service list soliciting WG members. ESA WG Members were selected in early December and an informal orientation meeting was held on December 17, 2021with a kick-off meeting scheduled for January 20, 2022.

D.21-06-015 directed the IOUs to set up a UAS Sub-Working Group (SWG), as part of the overall ESA WG to explore the feasibility of streamlining application processes for multiple IOU and non-IOU programs targeting income-qualified customers.[50] The UAS SWG is tasked to report its recommendations to Energy Division by July 1, 2022. Led by SoCalGas, the IOUs and Energy Division held a UAS SWG kick-off meeting on December 7, 2021.[51] The meeting also included participants from multiple community-based organizations, and representatives from the CA Air Resources Board (CARB) and the CA Department of Community Services and Development (CSD). The meeting covered topics including the UAS SWG Charter and Scope, and a UAS Monthly Timeline. The PowerPoint decks and all other UAS Working Group documents can be found at https://pda.energydataweb.com.

ESA/CARE Study Working Group

D.21-06-015 authorized the formation of a statewide Study Working Group for the ESA and CARE programs.[52] The Group's responsibilities include the following tasks for statewide non-statutory studies: assign a lead IOU for each study; develop and provide feedback on

[50] D.21-06-015 at 480-481 (OP 45).
[51] The IOUs are PG&E, SoCalGas, SDG&E, and SCE.
[52] D.21-06-015 at 410.

proposed scopes, budgets, timelines, statements of work, and other study scoping documents before finalized for study execution; participate in project kick-offs and attend project check-in meetings as needed; and provide feedback on project milestones and draft study results as requested by lead IOU in a timely manner.

On August 16, 2021 SDG&E, on behalf of the IOUs, noticed the low-income service list requesting parties interested in joining the Working Group to respond with a letter of interest. Two parties responded. The Working Group held its initial meeting on October 21, 2021 with attendees from the two interested parties, the four IOUs and Energy Division. Subsequently, additional stakeholder members were recruited and joined the Group. The Working Group met again on November 17, 2021 and December 17, 2021. Topics discussed during the first three meetings included an overview of studies planned for the 2021 – 2026 program cycle; work scope and timeline for the Categorical Eligibility Study; and overview of the SCE Clean Energy Homes pilot.

ESA Cost Effectiveness Working Group

The tasks for the ESA Cost Effectiveness Working Group concluded prior to 2021, therefore this working group did not meet in 2021.

Multifamily Working Group

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

Demand Analysis Working Group

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

On October 8, 2020, the DAWG hosted a webinar to present the work plan for the 2021 CPUC Efficiency Potential and Goals Study. The portion of the study related to low-income was given only a brief, high-level overview. A follow-up meeting was hosted by the Energy Division on November 23, 2020, to discuss the low-income portion of the study in more detail. SDG&E reviewed the work plan and provided comments.

On April 16, 2021, the Low-Income Program Energy Efficiency Potential Study was released. On May 13, 2021, the CPUC invited stakeholders to attend the 2021 Energy Efficiency Potential and Goals Draft Results workshop, presenting the Draft 2021 Energy Efficiency Potential and Goals Study and related studies, including the Low Income Program Energy Efficiency Potential Study.

1.11 Annual Public ESA Program and CARE Meeting

In compliance with D.17-12-009, the IOUs held a joint public meeting via webinar on June 30, 2021 to present an overview of 2020 CARE, FERA, and ESA Program results.[53] Specifically, SDG&E's presentation showed it achieved and exceeded the 2020 Initiative ESA Program homes treatment goal at 108% in 2019, which was accomplished through outreach and marketing efforts of the program. ESA Program home treatment was significantly lower in 2020 due to COVID-19. SDG&E's presentation showed an increase in the CARE Program enrollment

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

rate to 112%, which exceeded the program target of 90%. In addition, SDG&E's presentation showed FERA Program enrollment rate at 33%.

1.12 Multifamily Properties

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

In 2021, SDG&E began leveraging the data from the Multifamily Market Characterization study performed in 2020 from Res-Intel. The study identified and characterized multi-family properties in San Diego's service area. A dataset was provided that included data on various property characteristics including conditioned area square footage as well as premises and service points for electric and gas. SDG&E used the results of that study to provide the analysis for PY2021 shown below.

Properties characterized as "market rate" (with no rent restrictions) were chosen for the analysis. Properties with a high proportion of low income tenants were then identified using a proxy code from SDG&E's customer data matched to each premise. A total of 8,910 properties fit these criteria. Annual electric and gas consumption was then collected for each of these sites and categorized by common areas, tenant areas, and master meters. Finally, program participation records were queried for treatment dates at these properties.

As shown in the tables below, annual consumption for these properties in 2021 was 284,717 MWh and 14,283,695 therms. Furthermore, 7,226 of these properties received treatment through the ESA Program over the last 10 years with 205 of those treated in 2021.

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

Estimated Number of Properties	Average Conditioned Area Square Footage	Number of Properties Treated by ESA in Last 10 Years	Number of Properties Treated by MFEER or MIDI in Last 10 Years
8,910	7,482	7,226	167

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

	Total Annual Consumption	Total Common Areas Consumption	Total Annual Consumption for Units	Total Annual Consumption for Master Meters
MWh	284,717	21,379	263,339	590
Therms	14,283,695	6,535,807	7,747,888	5,141,969

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

Program Participation

Year Last Treated	# Properties Treated through ESA	# Properties Treated through MFEER[54]	# Properties Treated through MIDI[55]	# Properties Treated through RZnet[56]
2012	842	0	0	
2013	823	20	0	
2014	641	21	2	
2015	432	11	0	
2016	407	0	0	
2017	1,111	70	1	
2018	1,463	25	0	
2019	855	20	0	
2020	443	0	n/a	
2021	205	n/a	n/a	70

ESA and MFEER program participation data has been updated for years 2012 through 2020.

[54] The MFEER program closed in 2020. Properties treated in 2020 did not meet the criteria to be included in this analysis. Specifically, they were not identified as having a high proportion of low-income tenants.
[55] Data shown for MIDI participation is based on previous methodology described in the PY2019 Annual Report. Due to lack of participation and low cost-effectiveness, SDG&E closed the Middle Income Direct Install (MIDI) program at the end of 2019, via Advice Letter 3429-E/2797-G, approved December 20, 2019 and effective January 1, 2020.
[56] RZnet is a new program available to multi-family customers that launched in 2021. See https://www.sdge.com/residential/savings-center/rebates/multifamily-rebates for more information.

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

In 2021, SDG&E continued its outreach efforts by utilizing its MF SPOC and third-party implementer to further promote the programs within the multifamily space. Per Advice Letter 3196-E/2654-G, SDG&E's ESA CAM initiative had an initial target of treating 100 properties for program years 2017 through 2020. In program year 2021, the ESA CAM initiative continued to offer ESA CAM to Deed Restricted properties, treating 16 properties in the first half of the year and another 6 properties for the second half of the year, for a total of 22 properties. SDG&E requested the ESA CAM annual treatment target of 38 for 2021.[57] SDG&E's ESA CAM initiative achieved 84% of its cycle treatment target of 100 properties and 58% of its annual treatment target. SDG&E's ESA CAM initiative fell short in 2021 treatment targets due to COVID-19 pandemic impacts and supply chain issues.

Below is a summary of the ESA CAM Initiative accomplishments for 2021.

Description	Target	Actual	% Of Target
January – June 2021	19	16	84%
July – December 2021	19	6	32%
January – December 2021	38	22	58%
Total # of ESA CAM properties treated (2017 – 2021)	100	84	84%

The implementor for ESA CAM reported that they experienced customer hesitancy during the pandemic as well as supply chain issues that 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. Additionally, the

[57] SDG&E Advice Letter 3196-E/2654-G approved by Energy Division on May 23, 2018 effective May 30, 2018. SDG&E filed Advice Letter 3820-E/3004-G approved by the Energy Division on September 24, 2021 effective August 2, 2021.

ESA CAM implementor faced challenges with property managers, as they were stretched thin managing COVID-19 across portfolios, making it difficult for them to prioritize obtaining documentation for eligibility and/or submitting requested signatures on forms.

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

Finally, SDG&E's MF SPOC continued to leverage the Res-Intel Study findings that provided the following three services to improve data for comprehensive MF targeting efforts: 1) linked service accounts to a specific multifamily property by creating a Multifamily Property ID as a unique identifier; 2) added valuable real estate data taken from San Diego County Assessor Records and CoStar such as square footage, number of units, and amenities; and 3) developed Energy Use Intensity and Energy Benchmark scores for each property. SDG&E documents several key statistics from the resulting multifamily property dataset:

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

- Newer vintages make up a greater share of the housing stock in inland regions that experience greater extremes in outside temperatures.

Through these combined efforts and with the use of the MF Market Characterization data set, SDG&E hopes to strengthen its targeted multifamily marketing strategy and establish more leads in 2022.

1.12.3 Normalized Metered Energy Consumption Analysis of Multi-family Properties

Energy Division requested the IOUs provide a NMEC analysis on multi-family properties treated through the ESA CAM initiative.[58] The analysis requires twelve months of consumption data metered prior to measure installation date and twelve months of consumption data metered after the installation date. The analysis provided below is for properties treated in 2020.

Fifty-two multi-family sites were treated with common area measures during the period of January 2020 through December 2020.[59] Installed measures include interior and exterior lighting, central boilers, power strips, furnaces, heat pumps, pool pumps, air conditioning tune-ups, faucet aerators and programmable thermostats. Deemed savings reported for these installations were 796,244 kW and 5,670 therms.

Evergreen Economics was hired to perform a site level NMEC analysis on each of the 52 properties. In addition to normalizing for weather differences across years, the analysis also controlled for changes in energy usage outside of the installation period. The table below presents the resulting electric savings. Avoided energy use refers to the post treatment savings using weather conditions during that period. Normalized energy savings are adjusted for

[58] D.17-12-009 at 204.
[59] SDG&E reported 57 properties treated in 2020 in its PY2020 annual report; however, the NMEC analysis further aggregated these treated properties into 51 sites. In addition, a 52nd site was included in the analysis that was treated in 2020 but not reported in the PY2020 annual report.

"typical" weather conditions.[60] One site was not able to be modeled due to insufficient usage data to establish a baseline; for this site, the ex-ante savings are included in the total.

Annual Electric Energy Savings from NMEC Analysis

	Ex-Ante kWh	%	First Year Avoided Energy Use kWh	%	Normalized Energy Savings (kWh)	%
Total (52 Sites)	796,244	9%	958,089	11%	950,390	10%
Subtotal of most reliable (35 sites)	652,518	11%	939,436	16%	929,099	16%

As shown, results are provided for the total group of 52 sites and for a subset of 35 sites for which the results were considered more reliable due to sufficient data streams and better model fit. For both groups of sites, the avoided energy use in the first year and the weather normalized energy savings exceed the ex-ante estimates.

The table below presents the resulting gas savings across the 52 sites and for 5 sites that received gas measures.[61] In addition, results are provided for 3 sites that received gas measures and had sufficient data streams and good model fit.

[60] "Typical" weather conditions are based on historical weather patterns. This analysis used the CZ2018 reference weather files based on weather patterns from 1998 to 2017.
[61] Five sites received gas measures. Additional sites have estimated negative therms due to interactive effects from lighting.

Annual Gas Energy Savings from NMEC Analysis

	Ex-Ante therms	%	First Year Avoided Energy Use therms	%	Normalized Energy Savings (therms)	%
Total (52 Sites)	5,670	10%	2,027	4%	1,709	3%
Subtotal of sites with gas measures (5 sites)	7,993	14%	4,297	8%	4,104	7%
Subtotal of most reliable (3 sites)	4,731	15%	5,999	19%	5,875	18%

As shown, both the avoided energy use in the first year and the weather normalized energy savings are significantly lower than the ex-ante estimates for the total set of sites and for the subgroup of 5 sites with gas measures. For the subgroup of 3 sites considered more reliable, both the first year avoided energy use and the normalized energy savings exceed the ex-ante estimate.

Site level results and confidence intervals are provided in Appendix F. A complete description of the analysis and results is provided in workpapers.[62]

[62] See Evergreen Economics, NMEC Analysis of Multifamily Common Area Measures for PY2020, May 2022.

2. CARE EXECUTIVE SUMMARY

Summary of 2021 Results

This report provides SDG&E's CARE Program accomplishments and expenditures for program year 2021. At year-end, there were 317,504 customers participating in the CARE Program for an overall enrollment rate of 108%. Over the course of the program year, CARE program participation started trending downward. The decrease was due, in part, to the resumption of CARE program requirements such as recertifications and post enrollment verifications (PEVs) coupled with normal attrition and a system issue that caused some CARE customers to be dropped from the program. Expanding on the latter point, on March 17, 2022, SDG&E submitted a Rule 16.6 Letter to Executive Director Rachel Peterson (March 17 Letter) for purposes of notifying the Commission that SDG&E had taken action to reinstate certain CARE, FERA, and Medical Baseline (MBL) customers onto their respective programs as well as to request an extension of deadlines for certain CARE, FERA, and MBL recertification deadlines. At this time, SDG&E has not specifically identified whether this issue has impacted any sub-metered tenants or master-meter customers, but there is a possibility customer(s) from either or both were impacted. As described in detail in the March 17 Letter, which was served on the service list for A.19-11-003, SDG&E experienced a backlog (Backlog) in application and recertification processing due to issues with SDG&E's recent conversion to a new Customer Information System (CIS) and the lifting of COVID protections in July 2021. As a result of the Backlog and other related CIS issues, approximately 20,000 CARE and FERA customers in total fell off their respective low-income program. SDG&E's requests enumerated in its March 17 Letter, were subsequently approved by the CPUC on May 13, 2022.

SDG&E has reinstated all customers impacted by the Backlog who fell off CARE or FERA since April 5, 2021. Additionally, SDG&E has extended recertification deadlines for customers with upcoming recertification deadlines to ensure they do not fall off CARE or FERA, respectively. As of the date of this report, SDG&E is in the process of adjusting bills to account for any eligible discounts back to the date the customer was dropped from their respective program. Lastly, SDG&E has proposed a special accommodation to the CPUC to temporarily suspend credit activity for all impacted customers through the summer and early fall of 2022.

Procedural Background

The CARE Program, formerly known as the Low-Income Ratepayer Assistance (LIRA) Program, was established through legislative mandate[63] and implemented by the Commission in D.89-07-062 and D.89-09-044. In 1992, the Commission expanded the program to qualified non-profit group living facilities such as women's shelters and homeless shelters in response to additional legislation.[64] In D.95-10-047, CARE was further expanded to qualified agricultural housing facilities; and D.05-04-052 more broadly expanded the program to include agricultural housing and non-profit migrant farm working housing centers.

Since 2005, income eligibility for CARE has been set at 200% of the Federal Poverty Guidelines (FPG).[65] In 2006, the Commission authorized the IOUs to implement: (1) categorical eligibility to allow customers to qualify for the CARE Program based on participation in certain

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

state or federal assistance programs; (2) four-year recertification for income-qualified customers with fixed incomes; (3) a telephonic process to enroll certain prospective CARE qualified households; (4) a process for all customers to recertify CARE eligibility through SDG&E's Interactive Voice Recognition system; and (5) internet-based CARE enrollment and recertification.[66]

The Commission further expanded the list of categorically eligible programs in D.08-11-031 to align with the program-based eligibility programs adopted for the Commission's California Lifeline Program[67] and established an enrollment target for CARE at 90% of the estimated eligible population.[68]

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

In D.12-08-044, the Commission approved SDG&E's CARE Program plans and budget for program years 2012-2014. The Commission focused on developing controls to ensure that customers enrolling in the CARE Program are truly eligible for the benefits and also directed the IOUs to provide an increased focus on enrolling hard-to-reach customers, such as Limited English Proficient (LEP), hearing impaired, and visually impaired customers. Key directives in D.12-08-044 included: (1) establishment of a High Usage Verification process for customers with electric usage exceeding 400% of their baseline allowance;[69] (2) updates to the utilities' probability models to include more indicators, i.e. method of enrollment and household size;[70]

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[66] D.06-12-038 at 56.
[67] D.08-11-031 at 220 (OP 7).
[68] *Id.* at 6-7.
[69] D.12-08-044 at 17.
[70] *Id.* at 214.

(3) a process to review the list of categorical programs annually to ensure only programs aligned with the CARE guidelines are included;[71] and (4) approval of outreach and marketing funds focused on targeted multicultural/multilingual and LEP customers.[72] The Commission also retained the target of reaching a 90% enrollment rate and the enrollment of all eligible and willing customers into the CARE Program.[73]

In October 2013, the California Legislature enacted AB 327, which had several impacts to the CARE Program. Most notably, the bill required the IOUs to restructure CARE rates and to set an effective electric rate discount between 30-35%. In response, the Commission initiated Phase 2 in rulemaking (R.) 12-06-013 to address the CARE rate reform requirements from AB 327. As part of the rulemaking, SDG&E proposed to simplify the CARE rate structure by removing the discount from volumetric rates (with the exclusion of the exemption from Department of Water Resources Bond Charge (DWR-BC), California Solar Initiative (CSI), and CARE charges) and to instead provide a line-item discount off a bill calculated at standard rates. SDG&E's proposed CARE revisions were approved in Phase 2 via D.14-06-029.[74] Pursuant to that decision, SDG&E filed Advice Letter 2617-E to implement the changes in rates and propose a glidepath to set an effective CARE discount within the 35% statutory maximum by 2018.[75] This resulted in low-use CARE customers receiving a more equivalent discount when compared to high-use CARE customers. The resulting CARE rate subsidies are reflected in the Total Rate Adjustment Component (TRAC) for recovery through Public Purpose Program (PPP) rates. Subsequently, in Phase 3 of the rate restructuring proceeding, the Commission directed SDG&E

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[71] *Id.* at 15.
[72] *Id.* at 10.
[73] *Id.* at 15.
[74] D.14-06-029 at 61 (OP 3).
[75] *Id.* at 62 (OP 5).

to recalculate the glidepath for purposes of creating an effective 35% CARE discount by 2020 rather than 2018.[76,77]

The Phase 3 decision in the rate restructuring proceeding also initiated a CARE restructuring working group to assess whether the Commission should take any action on a proposal to restructure the CARE Program, which resulted in various workshops and status reports.[78] The CARE restructuring proposals included a greater discount on Tier 1 usage or tiered rate discounts with a greater discount for those in a lower income group. In September 2019, the Commission did not further restructure the CARE Program pursuant to the working group's proposals because no proposed alternative was more equitable or efficient in protecting low-income customers when compared to the current structure.[79]

In D.14-08-030, the Commission addressed the outstanding 2012-2014 Low Income Program Phase 2 issues identified in D.12-08-044, authorized a 12-month bridge funding period for 2015, made minor corrections and clarifications to D.12-08-044, adopted recommendations from the 2013 LINA study for CARE, and continued further review on issues regarding the definition of income and issues related to the qualifying list of categorical eligibility programs. In addition, D.14-08-030 determined that it was reasonable to continue funding the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) Pilot Program from the CARE budget, pending further review during the bridge period, and authorized continued funding.[80]

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

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

- The program will provide outreach, education, and bill issue assistance on natural gas and electricity bills and services to limited English proficient customers through a statewide network of CBOs;[81]
- The program will be managed by the Commission's Public Advisor's Office with technical assistance and input from the Energy Division;[82]
- Until a long-term funding source can be established through the budgetary and/or legislative channels, the ongoing CHANGES Program will be funded as a reimbursement from the CARE Program, through the end of the current 2015-2017 program cycle, and may be renewed by the Commission, as needed, into the next CARE Program cycle;[83] and
- In the future, the funding for CHANGES will ideally come from the Commission's reimbursable budget because it will provide greater latitude to address a range of energy assistance needs experienced by California's low-income population, the LEP population, and population with disabilities.[84]

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

In June 2019, the Commission issued Guidance Decision D.19-06-022 directing the IOUs to file Applications for ESA and CARE program plans and budgets for program years 2021 through 2026, and approved program year 2021 bridge funding for the ESA and CARE Programs with authorized spending up to 2020 program year levels for six months to a year, pending the Energy Division's approval of a Tier 1 Advice Letter. In accordance with the

[81] D.15-12-047 at 2.
[82] *Id.*
[83] *Id.* at 3.
[84] *Id.*

Guidance Decision, SDG&E timely filed the Low Income Application for program years 2021 through 2026 in November 2019. [85]

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

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

[85] Application (A.)19-11-005, *Application of San Diego Gas & Electric Company for Approval of Low-Income Assistance Programs and Budgets for Program years 2021-2026* (November 4, 2019).

On February 11, 2021, the Commission approved Resolution M-4849, directing the utilities to extend the emergency customer protections through June 30, 2021, and to separately file a Tier 2 Advice Letter with transition plans for the expiration of the COVID-19 Emergency Customer Protections by April 1, 2021.

In response to Resolution M-4849, Ordering Paragraph 5, SDG&E filed Advice Letter 3729-E/2967-G on April 1, 2021. The advice letter detailed SDG&E's Transition Plan for the expiration of COVID-19 Emergency Customer Protections for Residential and Small Business Customers, with plans to relaunch the recertification process for CARE, FERA, and MBL customers on July 1, 2021. The Plan also extended customer recertification deadlines so that any customer with a deadline falling within the first three months after protections were lifted would have three additional months to allow these customers to receive appropriate notice of their upcoming deadline.

In June of 2021, the Commission issued D.21-06-015, which approved SDG&E's CARE Program plans and budget for program years 2021 through 2026. The Decision approved key directives which included: (1) the extension of the CARE Expansion program recertification period from two years to four years;[86] (2) establishment of an exemption for fixed income households from recertification and verification requests until their account is closed, customer of record is altered, or a minimum of six years has transpired since the customer's income was verified using program approved documentation;[87] (3) establishment of a four year recertification cycle for CARE customers with a high probability score (at least 80 percent);[88] (4) modification of the post-enrollment verification requirements for customers that exceed 400 percent of

[86] D.21-06-015 at 472 (OP 6).
[87] *Id.* at 472 – 473 (OP 7).
[88] *Id.* at 473 (OP 9).

baseline from one time in 12 months to three times in a 12 month period;[89] (5) approval of an outbound call pilot for "attempted but failed" post-enrollment verified households;[90] (6) approval for an increase in capitation fees from $20 to up to $30 per enrollment;[91] (7) approval of the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program budget at a total of $10,515,012 for program years 2021 – 2026;[92] and (8) approval of a program evaluation for CHANGES by an independent third party to detail the benefits and cost-effectiveness of services delivered to low income customers.[93] Lastly, the Decision retained the 90 percent CARE enrollment rate.[94]

[89] *Id.* at 473 (OP 10).
[90] *Id.* at 474 (OP 13).
[91] *Id.* at 474 (OP 14).
[92] *Id.* at 475 (OP 20).
[93] *Id.* at 475 (OP 21).
[94] *Id.* at 472 (OP 4).

2.1 Participant Information

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

Residential CARE Program[95]						
Electric Customers by Month				Gas Customers by Month[96]		
PY 2021	CARE Customers	Percentage Change		PY 2021	CARE Customers	Percentage Change
Jan	341,143	1.5%		Jan	215,708	0.8%
Feb	343,831	0.8%		Feb	217,462	0.8%
Mar	343,347	-0.1%		Mar	217,363	0.0%
Apr	337,887	-1.6%		Apr	197,138	-9.3%
May	339,511	0.5%		May	198,202	0.5%
Jun	340,490	0.3%		Jun	198,866	0.3%
Jul	340,385	0.0%		Jul	199,133	0.1%
Aug	340,507	0.0%		Aug	199,309	0.1%
Sep	338,079	-0.7%		Sep	198,227	-0.5%
Oct	330,969	-2.1%		Oct	193,777	-2.2%
Nov	328,052	-0.9%		Nov	191,807	-1.0%
Dec	317,504	-3.2%		Dec	185,316	-3.4%

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

SDG&E used the joint utility methodology adopted by the CPUC in D.01-03-028 for developing monthly and annual enrollment estimates in 2021.[97,98] This methodology entails annual estimation of eligibility for CARE, ESA, FERA, and other income-by-household size

[95] Due to the timing of collection of CARE enrollment data, numbers throughout this report may vary slightly based on reporting timeframe from each monthly report throughout the year.
[96] Gas Customers by Month is a subset of the Electric Customers by Month.
[97] D.01-03-028 at 49-50.
[98] Compliance Filing of Pacific Gas & Electric (U 39-M) on Behalf of Itself, Southern California Gas Company (U 904-G), San Diego Gas & Electric Company (U 902-M) and Southern California Edison Company (U 338-E) Regarding Annual Estimates of CARE Eligible Customers and Related Information as reflected in A.19-11-003, et al. Filed on February 12, 2021. Athens Research produces the report that is included as part of this compliance filing. The analysis and subsequent report for this compliance filing is produced by Athens Research.

parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state.[99]

Sources for the 2021 eligibility estimates include the January Health and Human Services (HHS) Poverty Guidelines[100] ("bundling" one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327), current year small-area vendor marginal distributions on household characteristics, Census 2010 Summary File 3 (SF3) data, Census American Community Survey 2015-2020 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources.

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

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

[99] Athens Research performs the analysis using the joint utility methodology to provide the estimates for the California IOUs. The methodology described below is detailed within the Athens Research report.
[100] *See,* Federal Register / Vol. 86, No. 19 / February 1, 2021 / Notices, pps. 7732-7734.

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

The impact of labor force changes (unemployment and other forms of job separation, as well as positive changes) is also incorporated in the methodology. Method adjustments include block group marginal distributions on household income based on sub-state modeling that incorporates the Current Population Survey, Integrated Public Use Microdata Survey data, American Community Survey data, and the California EDD county and metropolitan statistical area level labor force series. This adjustment to block group income marginal is then incorporated into the otherwise "standard" estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

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

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

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

The joint utility methodology, as described above, was used throughout 2021.

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

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

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

See SDG&E's above response for Section 2.1.2. Note that the methodology is based on estimating small area (block group) level household size by income and householder-age tabulations for the current year and connecting these estimates with small area counts of households that are individually metered or sub-metered. Block-group/utility-specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area: zip+2, zip, tract, county, territory, etc. Statewide estimates, regardless of utility boundaries, are also provided at small and large area levels.

2.1.2.4 Describe how current CARE customers were counted.

SDG&E runs a report of active CARE participant statuses for each month, in Systems Applications and Products in Data Processing (SAP) which is the system of record for CARE applications and includes both individually metered and sub-metered CARE participants. In 2021, SDG&E transitioned from its legacy CIS to its new CIS, the SAP system. The first 3 months of program activity were calculated using SDG&E's CIS legacy data system and SAP for the remaining months of 2021.

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

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

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

Electric	23.5%
Gas	22.7%

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

Electric	14,059
Gas	11,131

At year-end 2021, there were 34,528 residential electric sub-metered accounts and 26,939 residential gas sub-metered accounts in SDG&E's service territory. Utilizing the methodology described in Section 2.1.2.3 – 2.1.2.5 above, it is estimated that 41% (or 14,059) of the electric residential sub-metered tenants and 41% (or 11,131) of the residential gas sub-metered tenants are eligible for the CARE Program.

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

Electric	10,730
Gas	9,591

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

Electric	76%
Gas	86%

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

As mentioned above, SDG&E experienced a backlog and system issues that impacted CARE customers. A total of 281 sub-metered tenants/master-meter customers were impacted. For further details, please refer to Section 2 – Executive Summary.

2.1.8 Discuss the steps taken towards Marketing CARE to Mobile Home customers and converting Mobile Home Sub-metering to direct utility served customers.

In January 2021, SDG&E sent 329 direct mail pieces to mobile home park owners or managers promoting the CARE discount. The letter encouraged owners or managers to pass the information to their tenants and included an informational poster to hang in common areas. Mobile home residents may also be exposed to SDG&E's CARE general awareness campaign, including TV, print, social media, and digital advertising.

2.2 CARE Program Summary

2.2.1 Please provide CARE Program summary costs.

CARE Budget Categories	2021 Authorized Budget[101]	2021 Actual Expenses	% of Budget Spent
Outreach	$ 3,214,243	$ 2,184,415	68%
Processing, Certification and Recertification	$ 815,982	$ 815,982	100%
Post Enrollment Verification[102]	$ 438,896	$ 20,644	5%
Information Tech./Programming	$ 850,006	$ 325,371	38%
Pilots[103]	$ 265,000	$ 244,182	92%
Measurement and Evaluation	$ 28,125	$ 10,623	38%
Regulatory Compliance	$ 300,000	$ 293,105	98%
General Administration	$ 625,000	$ 508,374	81%
CPUC Energy Division Staff	$ 84,917	$ 84,917	100%
Total Expenses	**$ 6,622,169**	**$ 4,487,613**	**68%**
Subsidies and Benefits[104]	$ 145,472,843	$ 174,824,860	120%
Total Program Costs and Discounts	**$ 152,095,012**	**$ 179,312,473**	**118%**

2.2.2 Please provide the CARE Program enrollment rate to date.

CARE Enrollment			
Participants Enrolled	Eligible Participants	Enrollment Rate	Target Met?
317,504	293,584	108%	Yes

[101] Reflects total authorized funding approved in the D.21-06-015, Attachment 1, Table 2 as adjusted for program year 2021 fund shifts in accordance with the fund shift rules set forth in D.08-11-031 as modified by D.10-10-008, D.16-11-022, D 17-12-009, and D.21-06-015.
[102] SDG&E Advice Letter 3516-E-D/2854-G-D implemented COVID-19 emergency customer protections. This Advice Letter suspended all CARE and FERA program removals and discontinued all recertification and verification requests that require customers to provide income verification through June 2021, in accordance with Resolution M-4849.
[103] Costs are for the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) Program. The CHANGES program was previously authorized as a pilot and was authorized as a program in D.15-12-047.
[104] CARE Rate Discount budget totals reflected in Advice Letters 3620-E and 2923-G, effective January 1st, 2021.

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

In 2021, there was one CARE recertification complaint in where a customer requested assistance in completing the renewal form. SDG&E assisted the customer in completing the renewal process and prorated the customer's bill for the lapse in CARE discount.

2.3 CARE Program Costs

2.3.1 Discount Cost

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

Average Monthly Electric Discount	$ 46.76
Average Monthly Gas Discount	$ 7.30

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

Electric Subsidy	$ 154,978,964
Gas Subsidy	$ 19,845,896

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

GTSR is the name used as an umbrella name for both SDG&E's Green Tariff (Schedule GT) and its Enhanced Community Renewables (Schedule ECR) rate. In 2021, there were a total of 684 CARE accounts on the Green Tariff component of Green Tariff Shared Renewables (GTSR). The average total effective CARE discount at year-end was 35%. SDG&E did not provide the percentage based on the "distribution" portion of the bill because the discount is not based on the distribution portion. New residential EcoChoice customers paid approximately $0.05 kWh extra as a rate premium to participate in EcoChoice at the 100% subscription level on top of their otherwise applicable rate. There is no other program discount associated with GTSR. SDG&E has never had any customers enrolled in its ECR rate.

2.3.2 Administrative Cost

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

Category	Total
Outreach	$ 2,184,415
Processing, Certification, Recertification	$ 815,982
Post Enrollment Verification	$ 20,644
IT Programming	$ 325,371
Pilots[105]	$ 244,182
Measurement & Evaluation	$ 10,623
Regulatory Compliance	$ 293,105
General Administration	$ 508,374
CPUC Energy Division	$ 84,917
Total Program Costs	$ 4,487,613

2.3.2.2 Explain what is included in each administrative cost category.

Outreach

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

Processing, Certification and Recertification

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

- Scanning and indexing applications;
- Processing CARE applications;
- Initiating and responding to customer inquiries regarding CARE applications/program;

[105] Costs are for the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) Program. The CHANGES program was previously authorized as a pilot and was authorized as a program in D.15-12-047.

- Fielding telephone calls related to CARE Program participation; and
- Resolving disputes related to CARE Program enrollment.

Post Enrollment Verification (PEV)

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

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

Information Technology (IT) /Programming

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

Pilots

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

Cool Centers/Cool Zones

In September 2019, SDG&E's General Rate Case was approved by the Commission in D.19-09-051 and included funding for the Cool Centers in SDG&E's Operating and Maintenance budget, effective January 1, 2019. The Commission reaffirmed funding of Cool Zones should remain funded in each utility's General Rate Case via OP 19 of Low Income Decision 21-06-015. Accordingly, the Cool Centers are no longer funded through the CARE Program. SDG&E files its Cool Center Annual Report by December 21 of each year.

Measurement and Evaluation

Costs include studies and customer satisfaction surveys associated with the CARE Program.

Regulatory Compliance

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

General Administration

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

Commission Energy Division Staff Funding

Costs incurred by the Commission's Energy Division staff in support of the Commission's authorized low-income program.[106]

2.3.3 Provide the year-end December 31 balance for the CARE balancing account for both the current and prior reporting periods.

CARE Subsidies Balancing Accounts	December 31, 2020	December 31, 2021
Electric under-collection	$ 15,281,618	$ 47,628,476
Gas under-collection	$ 4,099,331	$ 4,715,932

[106] D.00-02-045 directs the utilities to fund up to 10 civil servant positions for the EE and Low-Income programs. OP 9 allocates these costs 15% to SDG&E, 25% to SoCalGas, 30% to SCE, and 30% to PG&E. OP 10 further directs that each IOU allocate respective low-Income costs 70% to CARE and 30% to LIEE (now known as ESA).

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

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

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

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

2.4 Outreach

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

The CARE Program continued to be the leading offer of SDG&E's customer assistance marketing campaign, which sought to connect with low-income customers across a diverse population including hard-to-reach customers, seniors, customers with access and functional needs, and multilingual/multicultural customers. The campaign drove eligible customers to apply for CARE, and through SDG&E's coordinated efforts, CARE enrollments were automatically converted into ESA Program leads. In 2021, the Customer Assistance Programs campaign supported CARE, FERA and ESA programs. The campaign included print, streaming TV, digital media, bill inserts, ethnic marketing, email, and direct mail with examples provided in Appendix A-E of this report. This was in addition to live calls, outreach through SDG&E's Energy Solutions Partner Network, and CARE Capitation Agencies that help enroll customers in the CARE Program. Due to the COVID-19 pandemic, outreach in 2021 was heavily reliant on virtual activities in order to continue program engagement with partners and customers.

Mass Media

Mass media allowed SDG&E to educate and connect with its customers through diversified communication mediums designed to reach a mass audience and hard-to-reach populations including customers in rural areas, seniors, customers with access and functional needs and multilingual/multicultural customers. It served to drive overall awareness and complement other outreach tactics. In 2021, mass media components included print, streaming TV, general market TV, digital media, and bill inserts.

Print Campaigns

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

General Market & Streaming TV

In 2021, SDG&E ran a TV commercial campaign utilizing both Linear and Streaming TV media. The 30-second spots ran on general market stations including: ABC, CBS, NBC, FOX, CW, and KUSI, as well as various cable networks (Hallmark, Lifetime, ID). SDG&E also ran on Spanish-language stations, including Univision, Telemundo and Televisa. Streaming TV ran across multiple platforms and apps for both the general market and Spanish-language markets. Streaming TV is very flexible and allows SDG&E to target customer segments more deeply and optimize performance throughout the campaign. Through streaming TV, viewers cannot fast forward through the commercials. SDG&E ran one English and one Spanish version of its TV commercial throughout most of the year. SDG&E also updated our TV spot script to address the COVID-19 pandemic by offering information not just on CARE, but other programs such as LIHEAP and payment arrangements. Additionally, SDG&E ran PSA-style TV interviews in

English and Spanish, letting customers know we're all in this together and we have programs that can help, including the CARE program. Examples of the TV spots are included in Appendix A of this report.

Digital

SDG&E used an integrated online strategy to increase awareness and drive online submissions by using paid search, display ads, and pre-roll video ads. SDG&E digital ads were seen over 32 million times (impressions) throughout the year with over 244,000 customers clicking through to the CARE/ESA Program online application.

Bill Inserts

The annual CARE bilingual notification took place in July 2021. SDG&E also did a double-sided, bilingual bill insert promoting the CARE and ESA Programs in February 2021. All customers who indicate a preference for paper bills received the bilingual application in their SDG&E bill, while paperless bill customers were provided a link to view their monthly bill inserts.

Ethnic Marketing

SDG&E reached numerous ethnic segments throughout the year with a variety of mass media tactics. Hispanic, African American, Chinese, Vietnamese, and Filipino audiences were targeted by print. SDG&E continued to target Hispanic audiences via Spanish television and digital campaigns. The total spend for these ethnic media campaigns was $177,975, which is detailed below in the following tables:

CARE/ESA
2021 Ethnic Media Recap

Ethnic Print		
Audience	**Readership**	**Total Spend**
Spanish	2,163,038	$25,570
Chinese	120,000	$4,200
Vietnamese	180,000	$4,500
Filipino	600,000	$4,500
African American	525,000	$6,653
Totals	**3,588,038**	**$45,423**

Ethnic Television/OTT		
Audience	**Impressions**	**Total Spend**
Spanish	2,495,044	$58,878

Ethnic Influencers		
Audience	**Impressions**	**Total Spend**
Spanish	158,000	$2,500
Filipino	139,141	$2,925

Ethnic Digital		
Audience	**Impressions**	**Total Spend**
Spanish	7,816,620	$68,249

Total 2021 Ethnic Spend	**$177,975**

Email Campaigns

In 2021, SDG&E continued the strategy of using the nurture campaign model. The nurture campaigns send a series of pre-written, automated emails to customers based on their reaction to an initial email. This allows SDG&E to provide more customized messaging in automated follow-up emails. The actions that determine the messaging are:

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

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

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

In 2021, SDG&E continued to use email creative that shows non-CARE customers potential bill savings if they applied for and qualified for CARE. SDG&E showed the customer amounts paid on their energy bill in comparison to what the customer would have paid on CARE and highlighted the savings.

The campaigns contained integrated messaging and directed customers to the online application. Throughout the campaign, subject lines and content were modified based on customer behavior. In 2021, SDG&E sent over 483,900 bill comparison emails. Unique open rates, defined as how many people opened the email, were as high as 35%, indicating the subject lines were compelling to customers. By comparison, the energy industry standard open rates hover around 33%. Customer assistance emails garnered an average click-through rate of 3.1%, while SDG&E's average click-through rate was 2.4%. A sample of the creative can be found in Appendix D of this report.

Direct Mail Campaigns

SDG&E used Athens Research and SDG&E segmentation to geographically target SDG&E customers by identifying areas with mid-high propensity for program participation. SDG&E conducted 20 direct mail campaigns in 2021 (10 for CARE and 10 for ESA). Due to the CIS migration, we halted CARE direct mail efforts for February and March. For 2021, SDG&E sent a letter showing customers what they would have saved if they were on CARE as described above. The letter encouraged recipients to call SDG&E's toll-free enrollment number

or to apply through SDG&E's online application. SDG&E's Direct Mail campaign was sent to over 27,000 customers. A sample of the Direct Mail message from these campaigns can be found in Appendix E of this report.

Lifeline Collaboration

SDG&E continued to include information on Lifeline and provided the Lifeline toll-free phone number in the CARE acceptance letter and on SDGE.com within the Low-Income Assistance section of the website. The enhancement to SDG&E's website provides a resource for customers seeking telephone bill assistance which can benefit customers.

CHANGES Program

As previously discussed, the CHANGES program is a statewide program administered by a Commission selected third party lead contractor. The lead contractor selects and subcontracts with CBOs who act as utility liaisons for limited English proficient customers with utility inquiries and issues. In SDG&E's service territory these CBOs are the Alliance for African Assistance, Deaf Community Services of San Diego, and Casa Familiar. The CBOs target specific communities and offer other programs that are meant to complement SDG&E's services. The lists of CBOs in SDG&E's service territory were shared with SDG&E's internal Call Center and outreach team. The IOUs and CHANGES teams met regularly in 2021 to discuss program effectiveness.

Door-to-Door

In 2021, door-to-door campaigns were not conducted.

Live Call Campaign

The Harris Group (THG) utilized the data analysis from the CARE prospect list and continued an outbound call campaign to reach out to potentially eligible customers who live in SDG&E's service territory. THG's outbound call campaign (Live Call Campaign) also included a CARE Recertification Campaign which was resumed in Mid-September of 2021.[107] For 2021, the THG Live Call Campaign and CARE Recertification Campaign efforts resulted in over 20,405 completed CARE applications, contributed to over 18,000 new CARE enrollments, and over 1,548 CARE recertifications.

Community Outreach & Engagement

Community outreach allows SDG&E to connect and directly engage customers in energy savings solutions and programs in the communities where they work and live. These outreach activities provide information about SDG&E's CARE Program to potentially eligible customers. SDG&E has established partnerships with social service entities, such as the County of San Diego Health and Human Services Agency (HHSA), Family Health Centers of San Diego, and Somali Bantu Association of America, to connect with customers who are considered hard-to-reach or potentially have a language barrier. SDG&E also leveraged its established partnerships with non-profit organizations to deliver over 300 presentations, workshops and trainings, and participate in over 200 community events to assist SDG&E in securing enrollments through an organization that customers trust. The partnership with HHSA, resulted in approximately 1,050 CARE applications, 625 CARE enrollments, and 250 CARE recertifications.

[107] As detailed in Advice Letter 3729-E/2967-G, SDG&E relaunched the recertification process for CARE, FERA, and MBL customers on July 1, 2021.

CARE Capitation Agencies

SDG&E partners with 18 social service agencies such as the Women, Infants and Children (WIC) program, refugee assimilation organizations, 211 San Diego, and others to help enroll hard-to-reach customers. These organizations serve vulnerable, low-income individuals and families with enrollment in state and federally-funded assistance programs, including Cal Fresh, LIHEAP, Covered California, and California Lifeline. The partnering organizations provide multilingual staffing; they are located in diverse, low-income communities and serve multicultural/multilingual, seniors, veterans, access and functional needs, and limited English proficient (LEP) audiences. These partners contributed to over 1,700 CARE applications, over 1,200 CARE enrollments, and nearly 250 CARE recertifications.

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, social media channels such as Facebook, Twitter, and Instagram, posting information on their websites, providing booth space at events, and hosting enrollment day fairs at their locations. In 2021, over 2,600 activities were coordinated through this partner network to promote the CARE and ESA Programs. Of these

activities, CARE and ESA Programs were promoted in over 2,300 social media messages – Facebook, Twitter, and Instagram – by SDG&E's Energy Solutions Partner network, reaching over 4,772,000 impressions. The Energy Solutions Partner Network's activities were able to bring approximately 65 completed CARE applications, over 30 CARE enrollments, and over 25 CARE recertifications.[108]

Community Events & Presentations

Every year, SDG&E participates in hundreds of community events and presentations throughout its service area. Many of the Energy Solutions Partners host community events that offer social services such as: health and wellness fairs, community resource fairs, food banks, police and fire department open houses, employer fairs, and cultural fairs, as well as educational/STEM activities through schools and communities. SDG&E believes these are excellent opportunities for the Company to participate and further promote programs, since the events often attract low-income and fixed-income audiences. These events typically attract a variety of customer demographics including youth, seniors, and customers with access and functional needs. These community events also service SDG&E's rural, tribal, and harder to reach populations. Due to the COVID-19 pandemic, most of the 2021 events reformatted to a virtual presentation or drive-through format. While these events and presentations may not bring in large numbers of program enrollments, they serve a greater need of educating and engaging customers. In 2021, SDG&E promoted CARE and other customer assistance programs in over 300 presentations and events, reaching over 59,000 people.

[108] As detailed in Advice Letter 3729-E/2967-G, SDG&E relaunched the recertification process for CARE, FERA, and MBL customers on July 1, 2021.

Branch Offices and Customer Care Center

SDG&E's outreach team collaborates with the branch offices and bill payment locations to aid in educating customers on programs and services during impacted times of the year, such as summer months where customers may experience higher bills. In 2021, however, branch offices were closed to customer interaction because of COVID-19. The branch offices still accepted applications during this time from customers who dropped off the required forms. In 2021, the branch offices received over 70 CARE applications, resulting in over 50 CARE enrollments, and over 175 CARE recertifications.[109]

SDG&E's Customer Care Center also assists a million customers with a variety of energy inquiries each year. Customers are provided with information about the CARE Program in both English and Spanish while waiting to speak with an Energy Service Specialist (ESS) via the Interactive Voice Recognition System over the phone. An ESS offers the CARE Program and completes customer enrollments online for those customers who qualify. In 2021, the Customer Contact Center completed over 100 CARE applications, which contributed to over 90 CARE enrollments, and over 60 CARE recertifications.[110]

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

In 2021, approximately 700,000 customers received a Home Energy Report in both print and email formats. Of those customers, approximately 150,000, were enrolled in CARE representing 21% of the customers who received a Home Energy Report and accounts for 47% of all customers enrolled in CARE. The reports include a comparable homes comparison module that allows recipients to see how their consumption compares to homes of the same

[109] As detailed in Advice Letter 3729-E/2967-G, SDG&E relaunched the recertification process for CARE, FERA, and MBL customers on July 1, 2021.
[110] *Id.*

general size within their area. Additionally, the reports educate customers on their energy consumption, provide energy saving tips and, when applicable, encourage enrollment in CARE for those not already participating. Approximately 84,000 CARE customers received print reports and 66,000 CARE customers signed up to receive emailed energy efficiency alerts to help them proactively manage their usage.

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

SDG&E continues to look for the most effective ways to communicate to customers. As stated in Section 2.4.1, in 2021, SDG&E utilized several different outreach methods to enroll eligible CARE customers. The effectiveness of each outreach method is measured differently depending on the method. Some outreach methods may be measured on open rates, number of impressions, number of customers educated and informed of the program, and number of customers enrolled. Of the different outreach methods, it is hard to define which one was the most effective because it can take several marketing impressions before a customer takes action. However, if outreach effectiveness is based on the number of CARE enrollments and the conversion rate, the most successful and effective method was the "Live CARE Call Campaign" administered by THG. This campaign resulted in over 20,400 submitted CARE applications and enrolled over 18,000 new CARE customers and resulted in 1,548 CARE recertifications for 2021, resulting in a 90% conversion rate. To measure the success of some outreach methods, SDG&E provides each CARE partner, contractor, and activity with a unique source code number that they submit with each CARE application. This allows SDG&E to track each CARE application, CARE recertification, and CARE enrollment by source.

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

SDG&E's CARE Program continues to face barriers to program participation and must constantly evaluate and sometimes shift its focus to determine ways to counteract these challenges. In 2021, to gain a better understanding of these barriers from the customer perspective, the program surveyed a total of 409 program participants. The survey results revealed that most participants remain satisfied with the CARE Program (92%), up two percent from the previous year. The surveys also provided the following insights:

- 16% of survey participants enrolled in CARE as a result of COVID-19 - especially in the younger population;
- Those stating that they have improved the energy efficiency of their home and/or purchased an energy-efficient appliance has increased significantly;
- Email remains the most-preferred method for receiving information about CARE;
- Larger discounts on the monthly energy bill continue to be the top suggestion by customers;
- The proportion of customers who requested their application has dropped to pre-2020 levels, while those who received it via mail has increased. Online is also the most frequently-cited source for completing the CARE application, however SDG&E did see a decline compared to last year.

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

SDG&E has a two-way sharing of data for customers in Orange County who are served by both SoCalGas and SDG&E. In 2021, SDG&E received 396 enrollments through this effort. In addition, SDG&E shares CARE customer data with California American Water (CalAm) and Lifeline to assist in identifying customers for their customer assistance programs. In 2021, SDG&E provided 57,282 leads in March to CalAm and 327,512 leads in January to Lifeline.

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

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

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

SDG&E partners with CBOs and social service providers throughout San Diego and this continues to be an effective form of enrolling customers into the CARE, FERA, and ESA Programs. These organizations are involved daily with customers that meet the Commission's income or categorical qualifications and provide a one stop source for resources. Some of these organizations are WIC, CalFresh, LIHEAP, Covered California, and California Lifeline. Other partners include the CARE Partner Program with social service agencies and 211 San Diego, and leveraging the efforts of LIHEAP contractors. These programs were leveraged through presentations, events, workshops, and customized partner network messaging.

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

See Section 1.2.5 above.

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

SDG&E continues to find value in leveraging with partners such as CSD. This partnership demonstrates SDG&E's commitment to utilize every feasible effort to reach out to customers in need. SDG&E promotes the CSD's LIHEAP bill payment assistance and weatherization services programs, and also includes CSD LIHEAP's phone number on SDG&E's CARE applications and program materials so customers have direct contact information to access services. SDG&E's Customer Assistance staff also informs customers about services offered by CSD and refers customers to CSD for additional bill assistance through LIHEAP. Lastly, SDG&E's agreement with 211 San Diego requires part of the customer screening to include referral to LIHEAP agencies such as CUI and MAAC, as appropriate. In 2021, 211 San Diego handled approximately 75,000 utility-related calls and referred 10,258 of those to LIHEAP agencies.

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

In 2021, due to the COVID-19 pandemic, outreach partners began utilizing SDG&E's CARE online portal to assist with customer enrollments. The use of the CARE online portal reduced the number of paper applications submitted by outreach partners and allowed for faster customer program enrollment.

In SDG&E's 2021 CARE customer satisfaction survey, many CARE Program participants expressed interest in customized recommendations for managing home energy usage and costs. Accordingly, SDG&E plans to explore ways to increase the promotion of its home energy usage tools to CARE participants in 2022. SDG&E also plans to expand its electronic methods of communication to include text messaging in 2022 and explore integration through SDG&E's My Account for CARE Program eligibility requirements such as recertification and/or PEV.

SDG&E transitioned fulfillment services to its in-house fulfillment operations in April 2021. The transition allowed for greater efficiencies, easier management of postage mail notices to program participants, and cost savings.

2.5 Processing CARE Applications

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

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

request. If no response is received within 30 days, SDG&E mails a second request to the tenants prior to removal.[111]

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

SDG&E finds that collaboration with third party contractors is a necessary component to successfully reach and enroll hard-to-reach and under-served customers. In 2021, SDG&E partnered with third parties to conduct certification and recertification of CARE customers on the utility's behalf. As previously discussed, SDG&E contracted with THG to conduct a Live Call Campaign and CARE Recertification Campaign, resulting in over 18,460 CARE enrollments and 1,548 recertifications.[112] SDG&E also partnered with 211 San Diego, a 24-hour resource and information center connecting residents with community, health, and disaster services. Customers often contact 211 San Diego in an emergency to locate important resources including bill assistance programs, food, and shelter. The 211 San Diego partnership resulted in over 700 CARE enrollments and 184 CARE recertifications.

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

[111] As detailed in Advice Letter 3729-E/2967-G, SDG&E relaunched the recertification process for CARE, FERA, and MBL customers on July 1, 2021.
[112] *Id.*

mass media and community outreach tactics. The second is customer engagement to generate and measure enrollments. For these harder-to-reach and underserved audiences, it is important to utilize multiple tactics as stated above. It is difficult to evaluate cost-effectiveness per tactic, given that some of these tactics cannot be directly sourced to the actual customer enrollment and/or that the customer may experience multiple tactics prior to completing recertification as detailed in Section 2.4.2. This is especially true for mass media tactics like television, print, and online advertisements. In 2021, SDG&E's online advertising garnered over 32 million impressions (the number of times an SDG&E ad was seen by an on-line user) while ethnic print advertising had a readership of over 3.5 million and ethnic television garnered over 2.4 million impressions. All mass media channels encouraged customers to call SDG&E's toll-free number or visit SDG&E's website to complete an online application. It is challenging to determine how many impressions it took for customers who enrolled through the toll-free and online application process. However, as a general marketing principle, it may take 10 or more touches before a consumer takes action and responds to a tactic.

2.6 Program Management

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

In accordance with Commission Resolution M-4842, Emergency Authorization and Order Directing Utilities to Implement Emergency Customer Protections to Support California Customers During the COVID-19 pandemic, SDG&E discontinued generating all recertification and verification requests that require CARE customers to provide their current income information, discontinued all high-usage reviews, and suspended all CARE program removals to avoid unintentional loss of the discounted rate from March 4, 2020 through June 30, 2021 for which the customer is protected. Further details on the implementation of the emergency

disaster relief program for COVID-19 can be found under SDG&E Advice Letter 3516-E-D/2854-G-D. On July 1, 2021, SDG&E resumed normal program requirements such as issuing recertifications and post-enrollment verifications.[113] Additionally, SDG&E experienced a processing backlog and system issue that impacted some CARE customers. Further details on this matter can be found under Section 2 – Executive Summary.

2.7 Pilots

There were no pilots in 2021.

2.8 Studies

See Section 1.8 above for a description of the LINA study.

2.9 CARE Restructuring Working Group

In D.19-09-004, the Commission concluded that CARE would not be restructured at that time. In 2021, there were no activities relative to the CARE Rate Restructuring effort.

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

While in 2021, there were no coordination efforts with the California Advanced Services Fund new broadband public housing account, SDG&E did make low-cost broadband information available on its website as agreed to in the Joint Stipulation for affordable internet education and outreach for the CARE, FERA and ESA Programs.[114] Additionally, SDG&E's ME&O teams have met with California Emerging Technology Fund and are working together to promote low-cost broadband information to CBO's, ESA Program contractors, and customers. Please note there is no funding authorized by the Commission for broadband promotion.

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[113] Advice Letter 3729-E/2967-G, filed on April 1, 2021 and approved on April 28, 2021, detailed SDG&E's Transition Plan for the expiration of COVID-19 Emergency Customer Protections for Residential and Small Business Customers which included plans to relaunch the recertification process for CARE, FERA, and MBL.
[114] D.21-06-015 at Attachment 6.

3. CARE EXPANSION PROGRAM

3.1 Participant Information

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

2021	Commercial		Residential	
Month	Electric	Gas	Electric	Gas
Jan	185	115	514	227
Feb	185	116	502	227
Mar	165	100	443	189
Apr	191	112	511	232
May	190	109	510	232
Jun	189	109	510	231
Jul	193	109	499	228
Aug	186	109	500	227
Sep	187	111	496	227
Oct	187	111	494	225
Nov	187	111	493	225
Dec	187	111	498	225

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

Facility Type	Electric	Gas
Commercial	8,968	5,512
Residential	3,042	1,614

3.2 Usage Information

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

Commodity	Residential	Commercial
Gas	47	424
Electric	475	9,629

3.3 Program Cost

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

In 2021, SDG&E's Expanded CARE Program costs where related to labor associated with processing new enrollments and recertifications. The Expanded CARE Program costs totaled $816.

3.3.1.1 Discount Information

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

Residential Facility Gas Discount	$ 155
Residential Facility Electric Discount	$ 757

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

Commercial Facility Gas Discount	$ 1,013
Commercial Facility Electric Discount	$ 8,977

3.4 Outreach

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

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

Discuss each of the following:

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

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

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

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

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

The barrier to participation for Expanded CARE tends to come from the ability for these facilities to meet the guidelines – specifically 100% resident eligibility and non-profit status of the organization. SDG&E's Outreach and Account Executive team continues to promote Expanded CARE to eligible customers through general outreach activities and through the Energy Solutions Partner Network when applicable.

3.4.2 Discuss any recommendations to improve the cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties on the utility's behalf to improve outreach and enrollment services to non-participating facilities in the prior year. Provide cost-effectiveness assessments, if available.

In 2021, SDG&E automated its recertification notice for Expanded CARE customers through its new CIS. The automation eliminated the manual process for sending the recertification notice to Expanded CARE customers. Additionally, to address the aforementioned

barrier, and to improve the chances of non-participating facilities' participation in the program, SDG&E's Outreach and Account Executive teams continue to reinforce eligibility guidelines when applicable.

SDG&E will continue to explore ways to improve its operational cost-effectiveness, processing of applications, program delivery, and outreach and enrollment services to non-participating facilities in future program years.

3.5 Program Management

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

In accordance with Commission Resolution M-4842, Emergency Authorization and Order Directing Utilities to Implement Emergency Customer Protections to Support California Customers During the COVID-19 pandemic, SDG&E discontinued generating all recertification and verification requests that require CARE customers to provide their current income information, discontinued all high-usage reviews, and suspended all CARE program removals to avoid unintentional loss of the discounted rate during March 4, 2020 through June 30, 2021 for which the customer is protected. Further details on the implementation of emergency disaster relief program for COVID-19 can be found under SDG&E Advice Letter 3516-E-D/2854-G-D. On July 1, 2021, SDG&E resumed normal program requirements such as issuing recertification and post-enrollment verification notices.[115] Additionally, SDG&E experienced a processing backlog and system issue that may have impacted some Expanded CARE customers. Further details on this matter can be found under Section 2 – Executive Summary.

[115] Advice Letter 3729-E/2967-G, filed on April 1, 2021 and approved on April 28, 2021, detailed SDG&E's Transition Plan for the expiration of COVID-19 Emergency Customer Protections for Residential and Small Business Customers which included plans to relaunch the recertification process for CARE, FERA, and MBL.

4. FUND SHIFTING

4.1 Report Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D.10-10-008, 16-11-022, D.17-12-009, and D.21-06-015.

In 2021, SDG&E shifted ESA funds between categories and fuel type. SDG&E shifted excess funds from its Energy Efficiency subcategory Appliance to Lighting of $392,571 and from HVAC Electric to HVAC Gas of $862,039. See ESA Table 12 for the fund shift activity.

4.1.1 Report CARE fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D.10-10-008, D.16-11-022, D.17-12-009 and D.21-06-015.

During 2021, SDG&E shifted CARE funds in accordance with the rules set forth in D.08-11-031, as modified by D.10-10-008, D.16-11-022, D.17-12-009, and D.21-06-015 which granted the IOUs authority to shift funds between CARE Program categories. SDG&E used excess funds in the IT Programming category to shift a total of $269,994 to cover overages in the Processing, Certification, Recertification and CPUC Energy Division categories.

4.1.2 Was there any Energy Savings Assistance Program or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 20.1 of D. 08-11-031 as modified by D.10-10-008, D.16-11-022, D.17-12-009, and D.21-06-015?

There was no ESA Program or CARE Program fund shifting activity that occurred that falls outside of the rules laid out in the Section 20.1 of D.08-11-031, as modified by D.10-10-008, D.16-11-022, D.17-12-009, and D.21-06-015.

5. COMMONLY USED ACRONYMS

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

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

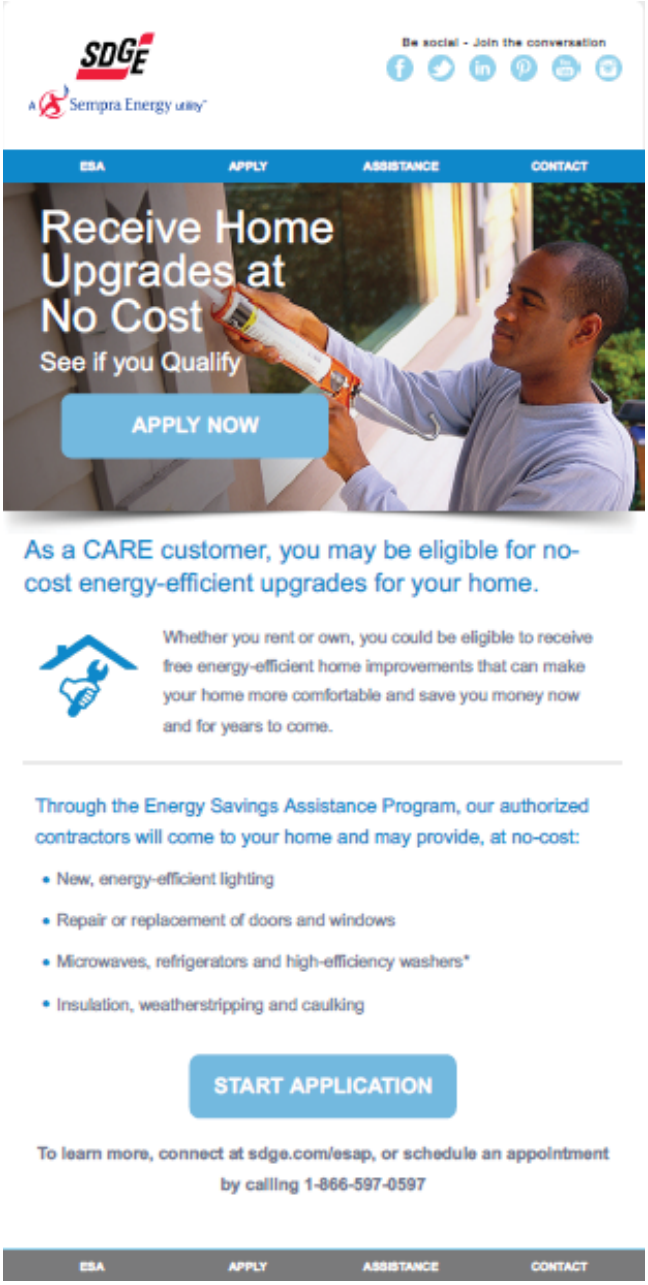
Appendix A - CARE TV Examples

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

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

Appendix B - ESA Email and Direct Mail Example

2021 ESA Email Example



2021 ESA Direct Mail Example

Save and enjoy a more comfortable home!

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

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

To see if you qualify

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

or visit **sdge.com/esap**

Energy Savings Assistance Program

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

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

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Appendix C - CARE & ESA Print

English Print Ad #1

English Print Ad #2

For many San Diegans, meeting everyday needs isn't easy. That's why SDG&E® offers assistance programs that can help lower your energy bills. See if you qualify for these money-saving benefits:

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

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

SDGE

A Sempra Energy utility

High energy use could result in removal from the program.
These programs are funded by California utility customers and administered by San Diego Gas & Electric under the auspices of the California Public Utilities Commission.
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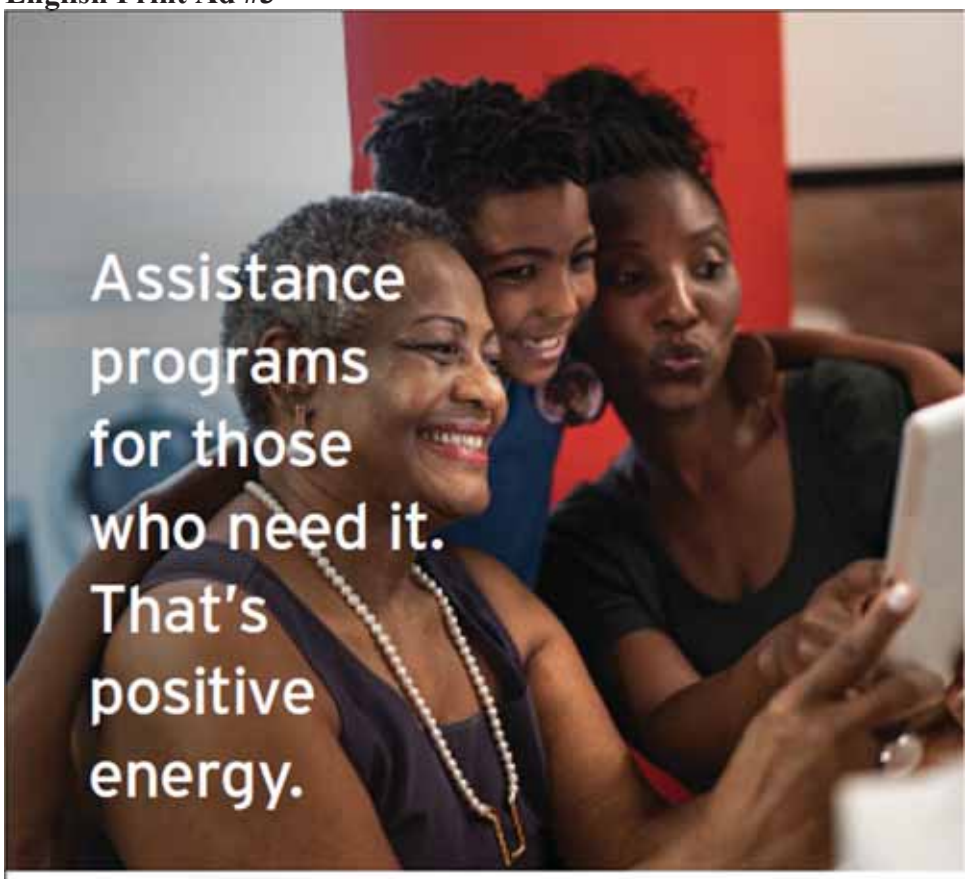
Follow us on:

English Print Ad #3



For many San Diegans, meeting everyday needs isn't easy. That's why SDG&E® offers assistance programs that can help lower your energy bills. See if you qualify for these money-saving benefits:

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

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

SDGE

A Sempra Energy utility

High energy use could result in removal from the program.
These programs are funded by California utility customers and administered by San Diego Gas & Electric under the auspices of the California Public Utilities Commission.

Follow us on:

English Print Ad #4

For many San Diegans, meeting everyday needs isn't easy. That's why SDG&E® offers assistance programs that can help lower your energy bills. See if you qualify for these money-saving benefits:

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

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

SDGE

A Sempra Energy utility

High energy use could result in removal from the program.
These programs are funded by California utility customers and administered by San Diego Gas & Electric under the auspices of the California Public Utilities Commission.
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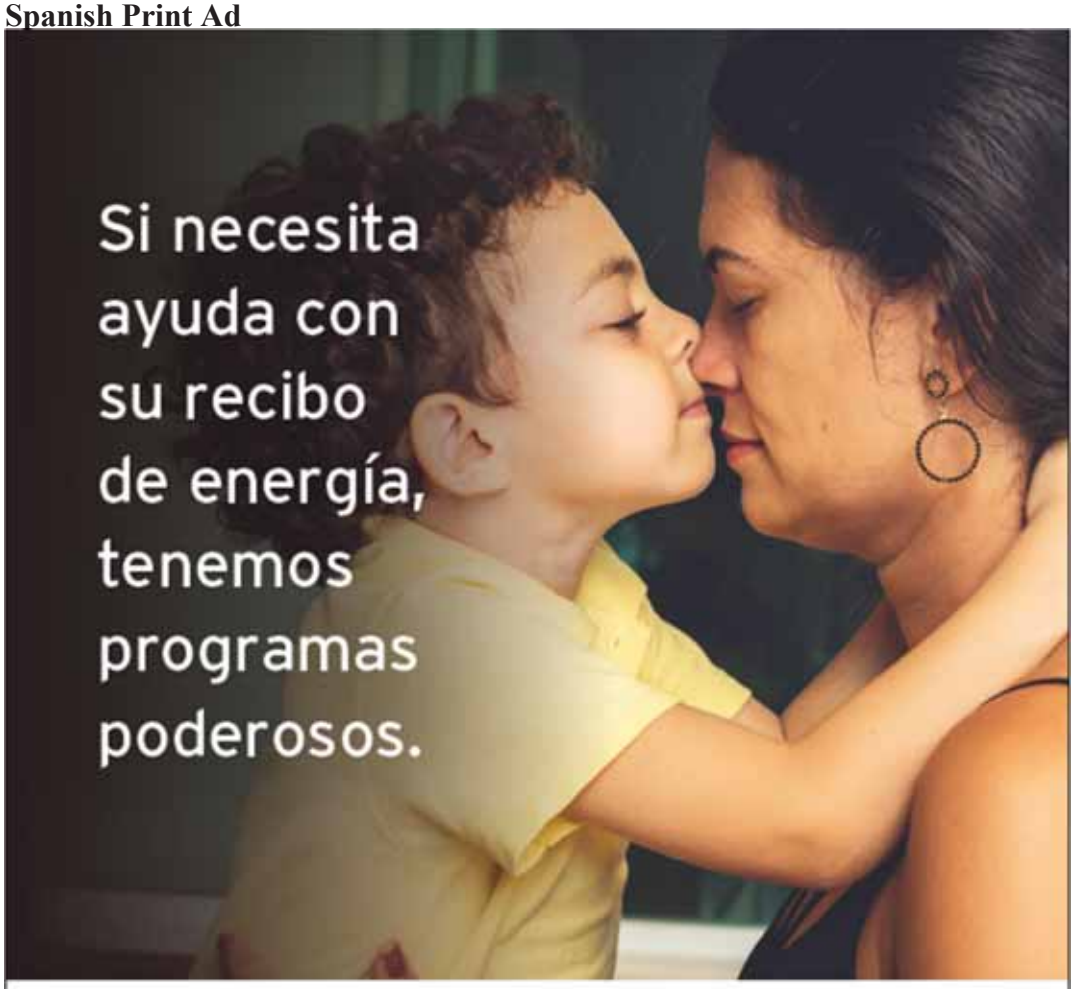
Follow us on:

Spanish Print Ad



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

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

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

SDGE
A Sempra Energy utility

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

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

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Síganos en

Vietnamese Print Ad

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

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

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

SDGE
A Sempra Energy utility

Appendix D - 2021 CARE Email Example

2021 CARE Email Example

Appendix E - 2021 CARE Direct Mail Example

2021 CARE Direct Mail Example

SDGE

A Sempra Energy utility*

How much could you have saved on your energy bill?

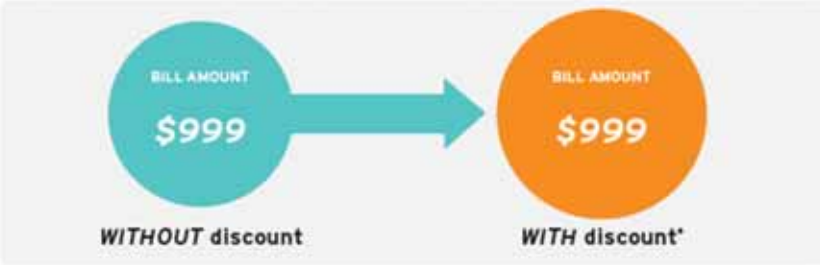
February 25, 2021

John Q. Sample
AMP - Arrearage Management Payment plan Ltr
1234 Anywhere Street
San Diego, CA 92123

Account number: 9999999999

Dear **John Q. Sample,**

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



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

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

Qualified residential CARE customers may also be eligible for financial assistance to help reduce outstanding account balances through SDG&E's Arrearage Management Payment (AMP) Plan. For details, visit ***sdge.com/AMP***.

Sincerely,

Pedro Ramirez
Customer Assistance Programs

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

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

000001

Appendix F – NMEC Results for ESA CAM PY2020

Electric Results

Site ID	Ex Ante Energy Savings kWh	%	First Year Avoided Energy Use kWh	%	Normalized Energy Savings kWh	%
A001	16,141	27%	10,200	17%	10,358	17%
A002	18,936	24%	13,642	17%	13,256	17%
A003	67,707	14%	40,854	9%	43,495	9%
A004	12,550	2%	73,991	11%	72,137	11%
A005	16,267	11%	8,943	6%	9,067	6%
A006	6,467	139%	742	16%	723	16%
A007	57,622	4%	187,835	13%	178,662	13%
A008	19,389	64%	8,218	27%	8,065	27%
A009	1,971	8%	4,764	20%	4,815	20%
A010	3,208	31%	-436	-4%	-572	-6%
A011	226	0%	6,174	7%	6,477	8%
A012	5,570	15%	14,819	41%	14,898	41%
A014	15,626	394%	-179	-5%	-203	-5%
A015	10,063	14%	29,110	40%	29,285	41%
A016	11,209	6%	-37,231	-20%	-43,664	-23%
A017	5,670	7%	8,332	10%	8,644	10%
A018	5,346	9%	16,047	26%	15,312	25%
A019	23,078	16%	16,066	11%	16,040	11%
A020	64,782	17%	122,194	32%	121,889	32%
A021	6,758	32%	3,056	15%	3,016	14%
A022	1,457	33%	-29*	-1%*	-1*	0%*
A023	18,534	20%	10,573	11%	10,242	11%
A024	6,822	5%	3,393	3%	3,846	3%
A025	24,439	20%	22,042	18%	21,632	17%
A026	2,882	8%	2,081	6%	2,229	6%
A027	301	1%	1,927	8%	1,991	8%
A028	5,715	1%	-130,891	-15%	-127,753	-15%
A029	37,194	30%	32,274	25%	30,568	24%
A030	10,768	12%	20,636	23%	20,930	23%
A031	5,304	44%	1,205	10%	1,240	10%
A032	24,617	20%	48,221	39%	48,140	39%
A035	11,595		11,595	-	11,595	-
A036	3,992	12%	10,326	31%	10,213	31%
A037	9,209	21%	11,530	26%	11,222	25%
A039	1,092	0%	904*	0%*	1,772*	0%*
A041	5,069	8%	14,763	22%	14,931	22%
A042	1,668	21%	1,211	15%	1,216	15%
A043	650	56%	521	45%	521	45%
A045	12,095	29%	3,057	7%	2,945	7%
A046	63,901	9%	78,830	11%	84,420	12%
A047	10,163	14%	2,439	3%	2,696	4%
A049	6,802	11%	23,959	38%	23,806	38%
A050	9,127	18%	25,626	48%	24,419	47%
A052	18,338	50%	12,773	35%	12,734	35%
A053	15,185	11%	40,951	31%	41,058	31%
A054	4,392	4%	17,659	18%	17,751	17%

A055	4,403	3%	20,275	15%	19,990	15%
A056	32,158	33%	39,526	41%	39,536	41%
A057	116	0.20%	21,621	43%	21,890	44%
A063	38,465	58%	14,318	22%	15,162	23%
A212	4,060	0%	45,027	5%	44,259	5%
A231	37,146	23%	22,603	14%	23,489	15%
Total (n=52)	796,244	9%	958,089	11%	950,390	10%

**Result is not statistically significant*

Gas Results

Site ID	Ex Ante Energy Savings therms	%	First Year Avoided Energy Use therms	%	Normalized Energy Savings therms	%
A020	3,723	20%	4,035	22%	4,027	21%
A026	602	6%	1,576	16%	1,501	16%
A027	406	12%	388	11%	347	10%
A030	2,022	12%	-2,437	-15%	-2,409	-15%
A046	1,240	18%	735	11%	638	9%
Total (n=5)	7,993	14%	4,297	8%	4,104	7%

Appendix G - ESA Program and CARE Program Tables

Summary Table – ESA Program and CARE Program

ESA Program – Table 1 – Overall Program Expenses

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

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

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

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

ESA Program – Table 3 – Program Cost Effectiveness

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

ESA Program – Table 5 – Direct Purchases & Installation Contractors

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

ESA Program – Table 7 – Expenditures Recorded by Cost Elements

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

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

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

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

ESA Program – Table 12 – Fund Shifting

ESA Program – Table 13 – Categorical and Other Enrollment

ESA Program – Table 14 – Leveraging and Integration

ESA Program – Table 15 – Expenditures for Pilots and Studies

ESA Program – Table 16 – Miscellaneous (2nd Refrig, Education Only, A/C Cycling, etc.)

ESA Program – Table 17 – Contractor Advanced Funding and Repayment

ESA Program – Table 18 – Tribal Outreach

ESA Program – Table 19 – Customer Segment/Needs State by Demographic, Financial, Location and Health Condition

CARE Program – Table 1 – CARE Overall Program Expenses

CARE Program – Table 2 – CARE Enrollment, Re-certification, Attrition, and Penetration

CARE Program – Table 3A – CARE Post-Enrollment Verification Results (Model) 2021

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

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

CARE Program – Table 5 – CARE Enrollment by County

CARE Program – Table 6 – CARE Recertification Results

CARE Program – Table 7 – CARE Capitation Contractors

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

CARE Program – Table 9 – CARE Average Monthly Usage & Bill

CARE Program – Table 10 – CARE Surcharge & Revenue

CARE Program – Table 11 – CARE Capitation Applications

CARE Program – Table 12 – CARE Expansion Program

CARE Program – Table 13 – CARE High Usage Verification Results

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

CARE Program – Table 14 – CARE Categorical Enrollment

	A	B	C	D
1	**SDG&E 2021 Energy Savings Assistance Program Annual Report**			
2				
3	**Energy Savings Assistance Program**			
4	**And**			
5	**California Alternate Rates for Energy Program**			
6				
7	**SDG&E 2021 Summary Highlights**			
8				
9	**ESA Program**			
10	**2021 Energy Savings Assistance Program Summary**			
11	**2021**	**Authorized / Forecasted Planning Assumptions**	**Actual**	**%**
12	Budget	$ 21,458,158	$ 14,510,984	68%
13	Funded from 2009-2021 Unspent Funds **	$ 5,652,715	$ 1,326,325	23%
14	Summary Homes Treated	11,946	13,658	114%
15	Summary kWh Saved	N/A	1,317,476	N/A
16	Summary kW Demand Reduced	N/A	176	N/A
17	Summary Therms Saved	N/A	22,330	N/A
18	First Touches Homes Treated *	N/A	4,652	N/A
19	- kWh Saved	N/A	557,816	N/A
20	- kW Demand Reduced	N/A	74	N/A
21	- Therms Saved	N/A	9,107	N/A
22	Go-Backs/Retreated Homes *	N/A	9,006	N/A
23	- kWh Saved	N/A	759,660	N/A
24	- kW Demand Reduced	N/A	101	N/A
25	- Therms Saved	N/A	13,223	N/A
26	Multifamily Common Area Measures Properties Treated **	38	22	58%
27	- kWh Saved	N/A	355,687	N/A
28	- kW Demand Reduced	N/A	74	N/A
29	- Therms Saved	N/A	20,560	N/A
30				
31	Note: Energy Division approved the 2021 authorized budget through SDG&E Advice Letter 3612-E/2905-G for January through June 2021 and D.21-06-015 approved for July through December. See Attachment 1 Table 11 of D.21-06-015. The financial table above excludes $3,412 of expenditures paid in April 2022 for services related to the 2021 program year due to the timing for the preparation of the 2021 Annual Report.			
32	* SDG&E's authorized forecast included the total number of homes treated for first touches versus go-backs/retreatments; measures and savings were not included in the forecast.			
33				
34	** D.19-06-022 directs the IOUs to use unspent and uncommitted ESA CAM for program year 2021. The unspent funds remaining at the end of December 31, 2020 is $5,544,035, to be used for January-June 2021. D.21-06-015 directs the IOUs to carry-forward all unspent and uncommitted ESA common area measures funding as of June 30, 2021 into the remainder of program year 2021 and 2022. In addition, budget represents for the Rapid Feedback Study efforts which authorized $200,000 the 2017-2020 program cycle (D.16-11-022 as modified by D.17-12-009).			
35				
36				
37	**CARE Program**			
38				
39	**2021 CARE Program Summary**			
40	**2021**	**Authorized Budget**	**Actual**	**%**
41	Administrative Expenses	$ 6,622,169	$ 4,487,613	68%
42	Subsidies	$ 145,472,843	$ 174,824,860	120%
43	Service Establishment Charge	$ -	$ -	n/a
44	**Total Program Costs and Discounts**	**$ 152,095,012**	**$ 179,312,473**	118%
45	**2021 CARE New Enrollments**	**Automatically Enrolled via Data Sharing, ESA Participation, etc.**	**Self Certified as Income or Categorically Eligible**	**Self Certified as Recertification**
46	Method	487	63,875	37,405
47	**2021 CARE Enrollment**	**Estimated Eligible Participants**	**Participants**	**Enrollment Rate**
48	**Total Enrolled**	293,584	317,504	108%
49				
50	Data in pie below includes costs for measure end use reflected in ESA Tables 1.			
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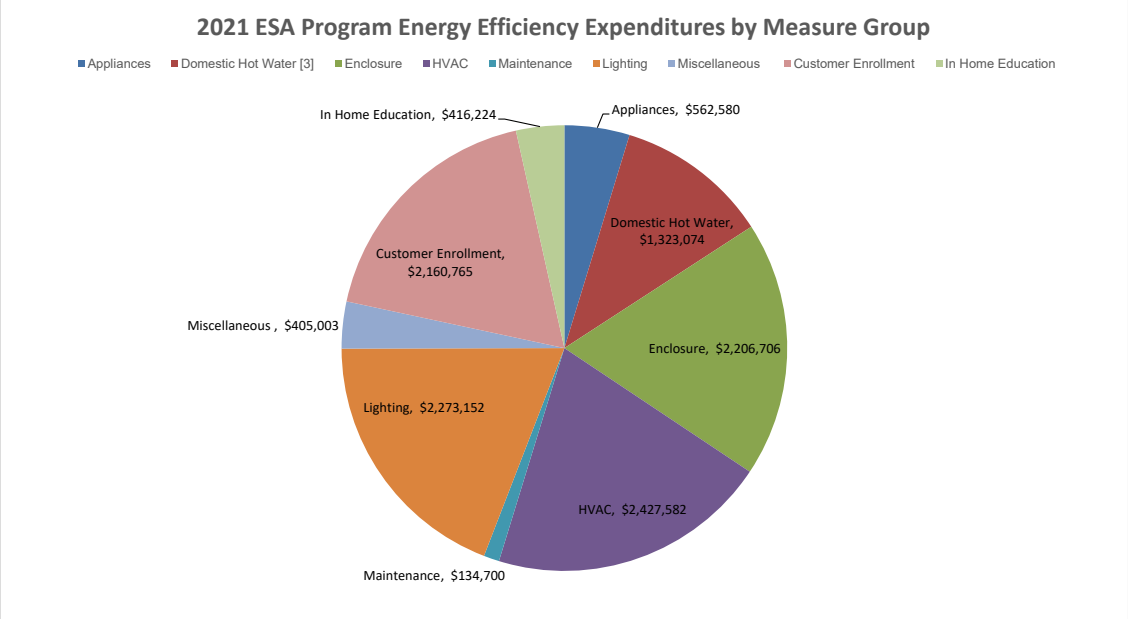

	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2021 Energy Savings Assistance Program Annual Report** **ESAP Table 1** **ESAP Overall Program Expenses**									
2		**2021 Authorized / Forecasted Budget [1] [2]**			**2021 Annual Expenses**			**% of Budget Spent**		
3	**ESA Program:**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
4	**Energy Efficiency**									
5	Appliances	$ 1,166,517	$ 139,093	$ 1,305,610	$ 489,753	$ 72,828	$ 562,580	42%	52%	43%
6	Domestic Hot Water [3]	$ 60,260	$ 1,948,398	$ 2,008,658	$ 39,692	$ 1,283,382	$ 1,323,074	66%	66%	66%
7	Enclosure	$ 1,585,520	$ 2,101,736	$ 3,687,256	$ 948,884	$ 1,257,823	$ 2,206,706	60%	60%	60%
8	HVAC	$ 1,389,128	$ 1,344,718	$ 2,733,846	$ 220,826	$ 2,206,756	$ 2,427,582	16%	164%	89%
9	Maintenance	$ -	$ -	$ -	$ -	$ 134,700	$ 134,700	0%	0%	0%
10	Lighting	$ 1,880,580	$ -	$ 1,880,580	$ 2,273,152	$ -	$ 2,273,152	121%	0%	121%
11	Miscellaneous	$ 661,118	$ -	$ 661,118	$ 405,003	$ -	$ 405,003	61%	0%	61%
12	Customer Enrollment	$ 1,738,716	$ 1,738,716	$ 3,477,433	$ 1,080,383	$ 1,080,383	$ 2,160,765	62%	62%	62%
13	In Home Education	$ 319,367	$ 319,367	$ 638,733	$ 208,112	$ 208,112	$ 416,224	65%	65%	65%
14	Contractor Advance Funds [4]	$ -	$ -	$ -	$ (189,837)	$ (189,837)	$ (379,675)	0%	0%	0%
15	Pilot	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
16										
17										
18	**Energy Efficiency Total**	**$ 8,801,206**	**$ 7,592,028**	**$ 16,393,234**	**$ 5,475,967**	**$ 6,054,145**	**$ 11,530,112**	**62%**	**80%**	**70%**
19										
20	Training Center	$ 101,587	$ 101,587	$ 203,173	$ 22,743	$ 22,743	$ 45,486	22%	22%	22%
21	Workforce Education and Training	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
22	Inspections	$ 79,993	$ 79,993	$ 159,985	$ 77,517	$ 77,517	$ 155,033	97%	97%	97%
23	Marketing and Outreach	$ 496,564	$ 496,564	$ 993,128	$ 350,254	$ 350,254	$ 700,508	71%	71%	71%
24	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
25	Measurement and Evaluation Studies	$ 105,625	$ 105,625	$ 211,250	$ 5,312	$ 5,312	$ 10,624	5%	5%	5%
26	Regulatory Compliance	$ 146,709	$ 146,709	$ 293,418	$ 106,734	$ 106,734	$ 213,468	73%	73%	73%
27	General Administration	$ 1,537,294	$ 1,537,294	$ 3,074,588	$ 900,686	$ 900,684	$ 1,801,370	59%	59%	59%
28	CPUC Energy Division	$ 25,392	$ 25,392	$ 50,783	$ 18,196	$ 18,196	$ 36,393	72%	72%	72%
29	SPOC	$ 39,300	$ 39,300	$ 78,599	$ 8,995	$ 8,995	$ 17,991	23%	23%	23%
30										
31										
32	**TOTAL PROGRAM COSTS**	**$ 11,333,668**	**$ 10,124,490**	**$ 21,458,158**	**$ 6,966,404**	**$ 7,544,580**	**$ 14,510,984**	**61%**	**75%**	**68%**
33	**Funded Outside of ESA Program Budget**									
34	Indirect Costs				$ 476,572	$ 477,701	$ 954,273			
35	NGAT Costs		$ 288,000	**$ 288,000**		$ 160,792	**$ 160,792**		56%	56%
36										
37	[1] Energy Division approved the 2021 authorized budget through SDG&E Advice Letter 3612-E/2905-G for January through June 2021 and D.21-06-015 approved for July through December 2021, see Attachment 1 Table 11 of D.21-06-015.									
38	[2] The authorized budget do not include unspent funds from previous year or previous program cycles. Any fund shifts are reflected in ESA Table 12.									
39	[3] Subcategory includes $55,030 of San Diego County Water Authority (SDCWA) reimbursements not included in ESA Table 2.									
40	[4] Negative amount represents repayments from contractors of the advance funds issued in 2020 that were not eligible for Post-Pandemic Return to Service (PRPS) credits.									
41										
42	Note: D.20-08-033 and D.21-06-015 directs the ESA program to use the EE administrative costs categories. For program year 2021, the Commission establishes SDG&E's ESA administrative cap at 18 percent, accordingly for 2021 SDG&E's administrative percent results is approximately 14 percent. The financial table above excludes $3,412 of expenditures paid in April 2022 for services related to the 2021 program year due to the timing for the preparation of the 2021 Annual Report.									
43										

	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2021 Energy Savings Assistance Program Annual Report** **ESAP Table 1A** **Expenses Funded from 2009-2016 Unspent Program Funds**									
2		**2021 Authorized / Forecasted Budget [1]**			**2021 Annual Expenses**			**% of Budget Spent**		
3	**ESA Program:**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
4	**Energy Efficiency**									
5										
6	Multi-Family Common Area Measures [2]	$ 2,772,018	$ 2,772,018	$ 5,544,035	$ 773,855	$ 508,654	$ 1,282,509	28%	18%	23%
7	In Home Education	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
8	Leveraging - CSD	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
9	Pilot	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
10	Measurement and Evaluation Studies [3]	$ 54,340	$ 54,340	$ 108,680	$ 21,908	$ 21,908	$ 43,816	40%	40%	40%
11	Regulatory Compliance	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
12	General Administration	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
13										
14	**TOTAL UNSPENT PROGRAM COSTS**	**$ 2,826,358**	**$ 2,826,358**	**$ 5,652,715**	**$ 795,763**	**$ 530,562**	**$ 1,326,325**	**28%**	**19%**	**23%**
15										
16										
17	[1] D.16-11-022 specifically directed funding for new initiatives to come from unspent 2009-2016 ESA Program funds, which is reaffirmed in Advice Letter SDG&E 3250-E/2688-G.									
18	[2] D.19-06-022 directs the IOUs to use unspent and uncommitted ESA CAM for program year 2021. The unspent funds remaining at the end of December 31, 2020 is $5,544,035, to be used for January-June 2021. D.21-06-015 directs the IOUs to carry-forward all unspent and uncommitted ESA common area measures funding as of June 30, 2021 into the remainder of program year 2021 and 2022.									
19	009).									
20										

SDG&E PY 2021 Energy Savings Assistance Program Annual Report

ESAP Table 2

ESAP Expenses and Energy Savings by Measures Installed

Measures	ESA Program (Summary)Total							ESA Program (First Touch Homes Treated)							ESA Program (Re-Treated Homes/Go Backs)						
		Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation					
	Units	Quantity Insta	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses ($)	% of Expenditure	Units	Quantity Installed	kWh[4] (Annual)	kW[4] (Annual)	Therms[4] (Annual)	Expenses ($)	% of Expenditure	Units	Quantity Installed	kWh[4] (Annual)	kW[4] (Annual)	Therms[4] (Annual)	Expenses ($)	% of Expenditure
Appliances		(K+S)	(L+T)	(M+U)	(N+V)	(O+W)															
High Efficiency Clothes Washer	Each	134	1,414	0	2,381	$ 127,386	1.1%	Each	41	555	0	721	$ 39,995	0.9%	Each	93	859	0	1,660	$ 87,392	1.1%
Refrigerator	Each	476	288,334	35	-	$ 435,194	3.6%	Each	194	119,704	14	-	$ 177,359	4.1%	Each	282	168,630	20	-	$ 257,835	3.4%
Microwave	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Domestic Hot Water [6]																					
Other Domestic Hot Water [5]	Home	4,091	23,061	3	12,363	$ 325,171	2.7%	Home	1,437	9,532	1	4,189	$ 125,253	2.9%	Home	2,654	13,529	2	8,174	$ 199,918	2.6%
Water Heater Tank and Pipe Insulation	Home	518	-	-	320	$ 35,117	0.3%	Home	247	-	-	144	$ 17,125	0.4%	Home	271	-	-	176	$ 17,992	0.2%
Water Heater Repair/Replacement	Each	1,560	-	-	37,698	$ 999,162	8.4%	Each	672	-	-	16,192	$ 362,832	8.3%	Each	888	-	-	21,506	$ 636,330	8.4%
Combined Showerhead/TSV	Each	89	404	0	513	$ 8,190	0.1%	Each	27	130	0	156	$ 2,389	0.1%	Each	62	275	0	357	$ 5,801	0.1%
New - Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	$ -	0.0%
New - Tub Diverter/ Tub Spout	Each	19	-	-	38	$ 2,038	0.0%	Each	10	-	-	20	1,075	0.0%	Each	9	-	-	18	$ 963	0.0%
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	$ -	0.0%
Enclosure																					
Air Sealing [1]	Home	4,372	89,232	19	2,130	$ 2,034,190	17.0%	Home	1,728	46,176	10	910	$ 824,524	18.9%	Home	2,644	43,056	9	1,220	$ 1,209,666	15.9%
Caulking	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	0.0%
Attic Insulation	Home	135	8,660	2	4,287	$ 174,314	1.5%	Home	57	4,730	1	1,855	$ 76,651	1.8%	Home	78	3,930	1	2,432	$ 97,663	1.3%
HVAC																					
FAU Standing Pilot Conversion	Each	3	-	-	30	$ 1,029	0.0%	Each	1	-	-	10	$ 343	0.0%	Each	2	-	-	20	$ 686	0.0%
Furnace Repair/Replacement	Each	1,721	-	-	(32,519)	$ 2,156,757	18.0%	Each	697	-	-	(13,227)	$ 745,637	17.1%	Each	1,024	-	-	(19,292)	$ 1,411,120	18.6%
Room A/C Replacement	Each	114	(7,440)	(1)	-	$ 122,159	1.0%	Each	19	(2,046)	(0)	-	$ 21,853	0.5%	Each	95	(5,394)	(1)	-	$ 100,305	1.3%
Central A/C replacement	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Duct Test and Seal	Home	159	-	-	834	$ 24,256	0.2%	Home	62	-	-	318	$ 10,217	0.2%	Home	97	-	-	516	$ 14,039	0.2%
New - Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
New - Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
New - A/C Time Delay	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
New - Smart Thermostat	Home	283	34,055	-	1,681	$ 62,998	0.5%	Home	162	20,967	-	922	$ 36,750	0.8%	Home	121	13,088	-	759	$ 26,248	0.3%
Maintenance																					
Furnace Clean and Tune	Home	1,704	-	-	(3,525)	$ 139,904	1.2%	Home	733	-	-	(1,617)	$ 60,988	1.4%	Home	971	-	-	(1,908)	$ 78,917	1.0%
Central A/C Tune up	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
Lighting																					
Interior Hard wired LED fixtures	Each	4,426	18,722	2	(339)	$ 377,053	3.2%	Each	1,601	6,772	1	(123)	$ 136,250	3.1%	Each	2,825	11,950	1	(216)	$ 240,803	3.2%
Exterior Hard wired LED fixtures	Each	2,113	10,861	1	-	$ 155,309	1.3%	Each	862	4,431	1	-	$ 63,332	1.5%	Each	1,251	6,430	1	-	$ 91,977	1.2%
LED Torchiere	Each	6,868	29,052	3	(522)	$ 646,969	5.4%	Each	2,175	9,200	1	(167)	$ 204,027	4.7%	Each	4,693	19,851	2	(356)	$ 442,942	5.8%
Occupancy Sensor	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
LED Night Light	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - LED R/BR Lamps	Each	5,489	16,577	2	(288)	$ 89,006	0.7%	Each	3,106	9,380	1	(160)	$ 50,365	1.2%	Each	2,383	7,197	1	(128)	$ 38,641	0.5%
New - LED A-Lamps	Each	75,136	159,288	19	(2,752)	$ 1,109,942	9.3%	Each	29,612	62,777	8	(1,037)	$ 437,132	10.0%	Each	45,524	96,511	12	(1,715)	$ 672,810	8.9%
Miscellaneous																					
Pool Pumps	Each	2	2,096	1	-	$ 4,087	0.0%	Each	1	1,048	0	-	$ 2,150	0.0%	Each	1	1,048	0	-	$ 1,937	0.0%
Smart Strip	Each	1,296	181,440	25	-	$ 65,669	0.5%	Each	594	83,160	12	-	$ 32,661	0.7%	Each	702	98,280	14	-	$ 33,008	0.4%
Smart Strip Tier II	Each	3,298	461,720	65	-	$ 293,085	2.4%	Each	1,295	181,300	25	-	$ 121,909	2.8%	Each	2,003	280,420	39	-	$ 171,176	2.3%
Pilots																					
		-	-	-	-	$ -															
Customer Enrollment																					
ESA Outreach & Assessment	Home	13,658	-	-	-	$ 2,159,605	18.0%	Home	4,652	-	-	-	$ 672,468	15.4%	Home	9,006	-	-	-	$ 1,487,138	19.6%
ESA In-Home Energy Education	Home	13,662	-	-	-	$ 416,224	3.5%	Home	4,650	-	-	-	$ 140,751	3.2%	Home	9,012	-	-	-	$ 275,473	3.6%
Total Savings/Expenditures			1,317,476	176	22,330	$ 11,964,816	100.0%			557,816	74	9,107	$ 4,364,036				759,660	101	13,223	$ 7,600,780	
Total Households Weatherized [2]		4,390							1,732							2,658					
Households Treated	Total (K+S)							First Touches							**Re-treated Homes/Go-Backs**						
- Single Family Households Treated	Home	5,130						Home	2,217						Home	2,913					
- Multi-family Households Treated	Home	7,214						Home	1,757						Home	5,457					
- Mobile Homes Treated	Home	1,314						Home	678						Home	636					
Total Number of Households Treated	Home	13,658						Home	4,652						Home	9,006					
# Eligible Households to be Treated for PY [3]	Home	11,946						Home	N/A						Home	N/A					
% of Households Treated	%	114%						%	N/A						%	N/A					
- Master-Meter Households Treated	Home	809						Home	267						Home	542					

[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] SDG&E Advice Letter 3612-E/2905-G and D.21-06-015 forecasted for homes treated annually.

[4] Savings estimates are sourced from the PY 2015 to 2017 ESA Impact Evaluation; Due to split year SDG&E used the results from the 2019 and 2020 savings estimates.

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

[6] Subcategory does not include $55,030 of San Diego County Water Authority (SDCWA) reimbursements included in Table 1.

Note: The financial table above excludes $3,412 of expenditures paid in April 2022 for services related to the 2021 program year due to the timing for the preparation of the 2021 Annual Report.

	A	B	C	D	E	F	G	H
1	**SDG&E 2021 Energy Savings Assistance Program Annual Report**							
2	**ESAP Table 2A**							
3	**ESAP Expenses and Energy Savings by Measures Installed - CSD [1]**							
4								
5			**ESA Program - CSD Leveraging**					
6			**Year-To-Date Completed & Expensed Installation**					
7	**Measures**	**Units**	**Quantity Installed**	**kWh (Annual)**	**kW (Annual)**	**Therms (Annual)**	**Expenses ($)**	**% of Expenditure**
8	**Appliances**							
9	High Efficiency Clothes Washer	Each	-	-	-	-	$ -	0.0%
10	Refrigerators	Each	-	-	-	-	$ -	0.0%
11	Microwaves	Each	-	-	-	-	$ -	0.0%
12	**Domestic Hot Water**							
13	Water Heater Blanket	Home	-	-	-	-	$ -	0.0%
14	Low Flow Shower Head	Home	-	-	-	-	$ -	0.0%
15	Water Heater Pipe Insulation	Home	-	-	-	-	$ -	0.0%
16	Faucet Aerator	Home	-	-	-	-	$ -	0.0%
17	Water Heater Repair/Replacement	Each	-	-	-	-	$ -	0.0%
18	Thermostatic Shower Valve	Each	-	-	-	-	$ -	0.0%
19	New - Combined Showerhead/TSV	Each	-	-	-	-	$ -	0.0%
20	New - Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%
21	New - Tub Diverter/ Tub Spout	Each	-	-	-	-	$ -	0.0%
22	New - Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%
23	**Enclosure**							
24	Air Sealing / Envelope	Home	-	-	-	-	$ -	0.0%
25	Caulking	Home	-	-	-	-	$ -	0.0%
26	Attic Insulation	Home	-	-	-	-	$ -	0.0%
27	**HVAC**							
28	FAU Standing Pilot Conversion	Each	-	-	-	-	$ -	0.0%
29	Furnace Repair/Replacement	Each	-	-	-	-	$ -	0.0%
30	Room A/C Replacement	Each	-	-	-	-	$ -	0.0%
31	Central A/C replacement	Each	-	-	-	-	$ -	0.0%
32	Heat Pump Replacement	Each	-	-	-	-	$ -	0.0%
33	Evaporative Cooler (Replacement)	Each	-	-	-	-	$ -	0.0%
34	Evaporative Cooler (Installation)	Each	-	-	-	-	$ -	0.0%
35	Duct Testing and Sealing	Home	-	-	-	-	$ -	0.0%
36	New - Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%
37	New - Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%
38	New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	0.0%
39	New - A/C Time Delay	Home	-	-	-	-	$ -	0.0%
40	**Maintenance**							
41	Furnace Clean and Tune	Home	-	-	-	-	$ -	0.0%
42	Central A/C Tune up	Home	-	-	-	-	$ -	0.0%
43	**Lighting**							
44	Compact Fluorescent Lights (CFL)	Each	-	-	-	-	$ -	0.0%
45	Interior Hard wired CFL fixtures	Each	-	-	-	-	$ -	0.0%
46	Exterior Hard wired CFL fixtures	Each	-	-	-	-	$ -	0.0%
47	Torchiere	Each	-	-	-	-	$ -	0.0%
48	Occupancy Sensor	Each	-	-	-	-	$ -	0.0%
49	LED Night Lights	Each	-	-	-	-	$ -	0.0%
50	New - LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	$ -	0.0%
51	New - LED Reflector Bulb	Each	-	-	-	-	$ -	0.0%
52	New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	$ -	0.0%
53	New - LED A-Lamps	Each	-	-	-	-	$ -	0.0%
54	**Miscellaneous**							
55	Pool Pumps	Each	-	-	-	-	$ -	0.0%
56	Smart Power Strips - Tier 1	Each	-	-	-	-	$ -	0.0%
57	New - Smart Power Strips - Tier 2	Each	-	-	-	-	$ -	0.0%
58	**Pilots**							
59								
60	**Customer Enrollment**							
61	Outreach & Assessment	Home					$ -	0.0%
62	In-Home Education	Home					$ -	0.0%
63								
64	**Total Savings/Expenditures**			-	-	-	$ -	0.0%
65								
66	Total Households Weatherized							
67								
68	**CSD MF Buildings Treated**			**Total**				
69								
70	- Multifamily			0				
71								
72								
73	[1] D.16-11-022, as modified in D.17-12-009, directed the utilities to fund measures offered by the ESA Program with the Department of Community Services and Developments (CSD) Low Income Weatherization Program (LIWP). Due to the lack of multifamily properties identified by CSD for LIWP projects in the SDG&E service territory, CSD and SDG&E did not enter into an agreement to leverage LIWP projects.							

SDG&E 2021 Energy Savings Assistance Program Annual Report
ESAP Table 2B
Multifamily Common Area Measures Initiative Expenses and Energy Savings by Measures Installed

Table 2B ESA Program - Multifamily Common Area Measures

ESA CAM Measures	Units (of Measure such as "each")	Quantity Installed	kWh [1] (Annual)	kW [1] (Annual)	Therms [1] (Annual)	Expenses ($)
Appliances						
Domestic Hot Water						
Central Boiler[2]	Cap-kBTUh	6,817	-	-	21,197	$ 335,184
Pipe Insulation	Home	1	-	-	8	$ 286
Faucet Aerator	Each	20	23	0	23	$ 157
Envelope						
HVAC						
AC Tune-up[2]	Cap-Tons	-	-	-	-	$ -
Furnace Replacement[2]	Cap-kBTUh	9	-	-	-	$ 463
HEAT Pump Split System [2]	Cap-Tons	20	614	0	(0)	$ 62,304
Programmable Thermostat	Each	3	424	-	31	$ 908
Lighting						
Exterior LED Lighting	Fixture	704	47,490	-	-	$ 133,026
Exterior LED Lighting - Pool	Lamp	-	-	-	-	$ -
Interior LED Exit Sign	Fixture	-	-	-	-	$ -
Interior LED Fixture	Fixture	1,291	241,409	58	(379)	$ 151,981
Interior LED Lighting [2]	KiloLumen	346	8,064	2	(5)	$ 34,690
Interior LED Screw-in	Lamp	404	5,257	1	(18)	$ 4,397
Interior TLED Type A Lamps	Lamp	546	20,526	5	(107)	$ 7,098
Interior TLED Type C Lamps	Lamp	848	31,880	8	(189)	$ 23,617
Miscellaneous						
Tier-2 Smart Power Strip	Each					
Variable Speed Pool Pump	Each					
Ancillary Services						
Audit		10				$ 11,856
Total	-	11,019	355,687	74	20,560	$ 765,967

Multifamily Buildings Treated	Total
-Total Number of Multifamily Properties Treated	22
- Subtotal of Master-metered Multifamily Properties Treated	12
- Total Number of Multifamily Tenant Units w/in Properties Treated	1,676

	Year to Date Expenses			
ESA Program - Multifamily Common Area	Electric	Gas	Total	
Administration [3]	$ 27,685	$ 27,685	$ 55,370	
Direct Implementation (Non-Incentive)	$ 236,514	$ 236,514	$ 473,028	
Direct Implementation	$ 509,656	$ 244,455	$ 754,111	*<<Includes measures costs*
TOTAL MF CAM COSTS	$ 773,855	$ 508,654	$ 1,282,509	

[1] Savings estimates are sourced from approved workpapers.

[2] This represents the unit of measure such as KiloLumen, Cap Tons and Cap kBTUh. It is not a count of each measure installed or each home the measure was installed in.

[3] Utility administration costs are 4.3 percent of total expenditures.

Note: Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022, as modified by D.17-12-009, where 65% of tenants are income eligible based on CPUC income requirements of at or below 200% of the Federal Poverty Guidelines.

SDG&E PY 2021 Energy Savings Assistance Program Annual Report
ESAP Table 3
Program Cost Effectiveness

Program	Ratio of Benefits Over Costs					Net Benefits $		
	ESACET	Resource Test	TRC	PAC	RIM	ESACET	Resource Test	TRC
ESA In-Unit [1]	0.19	0.30	0.08	0.08	0.07	$ (11,370,210)	$ (4,019,518)	$ (12,919,064)
ESA CAM			0.60	0.60	0.34			$ (493,876)

[1] Represents all single family, multifamily in-unit, and mobilehome dwellings.

Notes:

All program measures, including resource and non-resource measures, are represented in the ESACET. Only measures considered resource measures are represented in the Resource Test. Resource measures, as specified by D.21-06-015, include any measure with a unit savings of one or more kWh or therm.

The ESACET includes energy and non-energy benefits and all program costs including measure installation and administrative costs.

The Resource Test includes energy benefits and measure installation costs.

Energy Division instructed the IOUs to use the results of the PY2015 to 2017 ESA Impact Evaluation for their 2019 and 2020 savings estimates. These savings estimates were also used for PY2021. This does not apply to ESA CAM. ESA CAM savings estimates are based on approved workpapers.

Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC (renamed the Resource Test).

The ESACET and Resource Test are provided only for ESA in-home program activity and not for ESA CAM.

	A	B	C	D	E	F	G
1	**SDG&E PY 2021 Energy Savings Assistance Program Annual Report** **ESAP Table 4** **Detail by Housing Type and Source[1]**						
2							
3			**2021 Energy Savings[4]**				
4	Customer	**Housing Type**	**# Homes Treated**	**(mWh)**	**MW**	**(mTherm)**	**2021 Expenses**
5	**Gas and Electric Customers**						
6	**Owners - Total**		**3,377**	**532.619**	**0.070**	**15.897**	**$ 7,232,402**
7		**Single Family**	1,914	286.914	0.042	(15.936)	$ 4,364,112
8		**Multi Family**	267	22.367	0.003	1.390	$ 299,370
9		**Mobile Homes**	1,196	223.337	0.025	30.443	$ 2,568,920
10	**Renters - Total**		**9,286**	**655.994**	**0.089**	**6.433**	**$ 4,214,592**
11		**Single Family**	2,781	236.740	0.033	4.789	$ 1,722,684
12		**Multi Family**	6,432	409.370	0.055	1.574	$ 2,452,265
13		**Mobile Homes**	73	9.884	0.001	0.070	$ 39,643
14	**Electric Customers (only)**						
15	**Owners - Total**		**336**	**66.911**	**0.009**	**-**	**$ 237,646**
16		**Single Family**	247	52.974	0.007	-	$ 192,664
17		**Multi Family**	50	3.240	0.000	-	$ 25,705
18		**Mobile Homes**	39	10.697	0.001	-	$ 19,277
19	**Renters - Total**		**659**	**61.952**	**0.008**	**-**	**$ 280,177**
20		**Single Family**	188	29.452	0.004	-	$ 110,005
21		**Multi Family**	465	29.354	0.004	-	$ 164,679
22		**Mobile Homes**	6	3.146	0.000	-	$ 5,493
23	**Gas Customers (only)**						
24	**Owners - Total**		**-**	**-**	**-**	**-**	**$ -**
25		**Single Family**	-	-	-	-	$ -
26		**Multi Family**	-	-	-	-	$ -
27		**Mobile Homes**	-	-	-	-	$ -
28	**Renters - Total**		**-**				
29		**Single Family**	-	-	-	-	$ -
30		**Multi Family**	-	-	-	-	$ -
31		**Mobile Homes**	-	-	-	-	$ -
32							
33	**Gas and Electric Total - ESA CAM**						
34	**Multifamily Common Area Bldgs - Total**		22	356	0.074	20.560	$ 765,966
35							
36	**Totals:**		**13,680**	**1,673**	**0.250**	**43**	**$ 12,730,783**
37	Note: The financial table above excludes $3,412 of expenditures paid in April 2022 for services related to the 2021 program year due to the timing for the preparation of the 2021 Annual Report.						
38							
39			**Penetration History**				
40	**Year**	**Homes Treated [5]**	**Ineligible & Unwilling[2]**	**Estimated Eligible in Current Year[3]**	**Current Year Penetration Rate for Homes Treated**		
41	**2002**	14,089					
42	**2003**	15,706					
43	**2004**	14,897					
44	**2005**	11,254					
45	**2006**	13,771					
46	**2007**	13,074					
47	**2008**	20,804					
48	**2009**	20,927	6,685	20,384	103%		
49	**2010**	21,593	8,690	20,384	106%		
50	**2011**	22,575	8,423	20,384	111%		
51	**2012**	22,415	7,871	20,316	110%		
52	**2013**	17,568	13,411	20,316	86%		
53	**2014**	22,039	15,738	20,316	108%		
54	**2015**	20,209	17,308	20,316	99%		
55	**2016**	19,792	22,570	20,316	97%		
56	**2017**	13,212	30,306	11,563	114%		
57	**2018**	7,785	50,716	11,667	67%		
58	**2019**	10,072	31,415	4,630	218%		
59	**2020**	5,308	7,964	243	2184%		
60	**2021**	13,658	32,649	11,946	114%		
61	**Total Homes Treated since 2002**	**320,748**	**253,746**	**202,781**			
62							
63	[1] Summary data which includes ESA Program, CSD Leveraging, and ESA CAM efforts.						
64	[2] Ineligible & Unwilling defined in ESA Table 8.						
65	[3] For years prior to 2017, this value is based on Attachment F of D.12-08-044 and D.14-08-030. For 2017 and 2018, this is based on the calculation of remaining eligible households as described on 1) pages 5 and 6 of SDG&E's Conforming Advice Letter filed April 3, 2017 and as ordered in Ordering Paragraph 80 of D.17-12-009 (for the 2017 value) and 2) SDG&E's Midcycle Advice Letter 3250-E/2688-G filed July 16, 2018 (for the 2018 value) for program years 2019 -2021.						
66	[4] Savings estimates for ESA treated homes are sourced from the PY 2015 to 2017 ESA Impact Evaluation. Savings for ESA CAM are sourced from approved workpapers.						
67	[5] Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative. It includes first touches and CSD leveraging authorized in D.16-11-022 and D.17-12-009. It does not include go-backs/retreatments.						
68							
69							
70							
71	**Year**	**Utility in Shared Service Territory**	**Eligible Households in Shared Service Territory**	**Eligible Households Treated by Both Utilities in Shared Service Territory**			
72	**2021**	SoCalGas	14,172	6			
73							

SDG&E PY 2021 Energy Savings Assistance Program Annual Report
ESAP Table 5
ESAP Direct Purchases & Installation Contractors

	A	B	C	D	E	F	G
1							
2			Contractor Type				2021 Annual
3	**Contractor**	**County**	**Private**	**CBO**	**WMDVBE**	**LIHEAP**	**Expenditures [1]**
4	American Eco Services, Inc.	San Diego	X		X		$ 1,545,842
5	Campesinos Unidos Inc.	San Diego		X	X	X	$ 532,798
6	Capital State Construction	San Diego	X				$ 486,405
7	Eagle Systems International Inc.	San Diego	X				$ 1,183,561
8	Jerry's Heating & Air Conditioning, Inc.	San Diego	X				$ 1,248,331
9	MAAC Project	San Diego		X		X	$ 789,554
10	R&B Wholesale Distributor	San Diego	X				$ 562,580
11	Reliable Energy Management Inc.	Orange	X				$ -
12	Richard Heath & Associates	San Diego	X		X		$ 4,053,148
13	THA Heating and Air Conditioning Inc.	San Diego	X				$ 1,562,597
14	**Total Contractor Expenditures**						**$ 11,964,816**
15							
16	[1] Contractor activity excludes expenses from Pilot and Multi-Family Common Area Measures reflected in ESA Tables 1A, 7 and 12. Additionally, the value excludes $55,030 for rebates received from SDCWA reported on Table 1.						
17	Note: The financial table above excludes $3,412 of expenditures paid in April 2022 for services related to the 2021 program year due to the timing for the preparation of the 2021 Annual Report.						

SDG&E PY 2021 Energy Savings Assistance Program Annual Report
ESAP Table 6
ESAP Installation Cost of Program Installation Contractors [1], [2]

		CBO/WMDVBE						Non-CBO/WMDVBE						2021 Program Total				
	Unit of Measure	Installations		Dwellings		Costs		Installations		Dwellings		Costs						Cost/
		Units	%	Units	%	$	%	Units	%	Units	%	$	%	Units Installed	Installations	Costs	Cost/ Unit	Household
Dwellings	Each	120,406	78%	12,217	89%	$ 6,921,342	54%	33,186	22%	1,457	11%	$ 5,809,441	46%	153,592	13,674	$ 12,730,783	$ 82.89	$ 931.02
Appliances																		
High Efficiency Clothes Washer	Each	-	0%	-	0%	$ -	0%	134	100%	134	100%	$ 127,386	100%	134	134	$ 127,386	$ 951	$ 951
Refrigerator	Each	-	0%	-	0%	$ -	0%	476	100%	481	100%	$ 435,194	100%	476	481	$ 435,194	$ 914	$ 905
Microwave	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	-	0%	-	-	$ -	$ -	$ -
Domestic Hot Water																		
Other Domestic Hot Water	Home	3,494	78%	3,494	78%	$ 234,790	72%	997	22%	997	22%	$ 90,381	28%	4,491	4,491	$ 325,171	$ 72	$ 72
Water Heater Repair/Replacement	Home	829	51%	829	51%	$ 136,080	14%	802	49%	802	49%	$ 863,083	86%	1,631	1,631	$ 999,162	$ 613	$ 613
Water Heater Tank and Pipe Insulation	Home	58	11%	58	11%	$ 3,732	11%	460	89%	460	89%	$ 31,385	89%	518	518	$ 35,117	$ 68	$ 68
New - Heat Pump Water Heater	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Tub Diverter/ Tub Spout	Each	-	0%	-	0%	$ -	0%	19	100%	15	100%	$ 2,038	100%	19	15	$ 2,038	$ 107	$ 136
New - Thermostat-controlled Shower Valve	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Combined Showerhead/TSV	Each	89	100%	89	100%	$ 8,190	100%	-	0%	-	0%	$ -	0%	89	89	$ 8,190	$ 92	$ 92
CAM - Central Boiler	Cap-kBTUh	-	0%	-	0%	$ -	0%	6,817	100%	7	100%	$ 335,184	100%	6,817	7	$ 335,184	$ 49	$ 47,883
CAM - Faucet Aerator	Each	-	0%	-	0%	$ -	0%	20	100%	9	100%	$ 157	100%	20	9	$ 157	$ 8	$ 17
CAM - Pipe Insulation	Home	-	0%	-	0%	$ -	0%	1	100%	1	100%	$ 286	100%	1	1	$ 286	$ 286	$ 286
Enclosure																		
Air Sealing	Home	2,805	60%	2,805	60%	$ 1,235,224	61%	1,905	40%	1,905	40%	$ 798,966	39%	4,710	4,710	$ 2,034,190	$ 432	$ 432
Attic Insulation	Home	105	74%	105	74%	$ 115,458	66%	37	26%	37	26%	$ 58,856	34%	142	142	$ 174,314	$ 1,228	$ 1,228
HVAC																		
FAU Standing Pilot Conversion	Each	3	100%	3	100%	$ 1,029	100%	-	0%	-	0%	$ -	0%	3	3	$ 1,029	$ 343	$ 343
Furnace Repair/Replacement	Each	1,047	50%	1,047	50%	$ 115,398	5%	1,061	50%	1,061	50%	$ 2,041,359	95%	2,108	2,108	$ 2,156,757	$ 1,023	$ 1,023
Room A/C Replacement	Each	114	100%	114	100%	$ 122,159	100%	-	0%	-	0%	$ -	0%	114	114	$ 122,159	$ 1,072	$ 1,072
Central A/C Replacement	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Heat Pump Replacement	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Evaporative Coolers (Replacement)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Evaporative Coolers (Installation)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Duct Test and Seal	Home	142	85%	142	85%	$ 14,217	59%	25	15%	25	15%	$ 10,039	41%	167	167	$ 24,256	$ 145	$ 145
New - Energy Efficient Fan Control	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Prescriptive Duct Sealing	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Smart Thermostat	Home	10	4%	10	4%	$ 2,003	3%	274	96%	274	96%	$ 60,995	97%	284	284	$ 62,998	$ 222	$ 222
CAM - HEAT Pump Split System	Each	-	0%	-	0%	$ -	0%	20	100%	3	100%	$ 62,304	100%	20	3	$ 62,304	$ 3,195	$ 20,768
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - A/C Time Delay	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
CAM - AC Tune-up	Cap-Tons	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
CAM - Furnace Replacement	Cap-kBTUh	-	0%	-	0%	$ -	0%	9	100%	1	100%	$ 463	100%	9	1	$ 463	$ 51	$ 463
CAM - Programmable Thermostat	Each	-	0%	-	0%	$ -	0%	3	100%	1	100%	$ 908	100%	3	1	$ 908	$ 303	$ 908
Maintenance																		
Furnace Clean and Tune	Home	1,540	90%	1,540	90%	$ 128,464	92%	164	10%	164	10%	$ 11,440	8%	1,704	1,704	$ 139,904	$ 82	$ 82
Central A/C Tune-up	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Evaporative Cooler Maintenance	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Lighting																		
Exterior Hard wired LED fixtures	Each	1,765	84%	863	80%	$ 129,706	84%	348	16%	218	20%	$ 25,603	16%	2,113	1,081	$ 155,309	$ 74	$ 144
Interior Hard wired LED fixtures	Each	4,102	93%	1,497	90%	$ 349,256	93%	324	7%	168	10%	$ 27,797	7%	4,426	1,665	$ 377,053	$ 85	$ 226
LED Night Light	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
LED Torchiere	Each	6,858	100%	4,599	100%	$ 646,031	100%	10	0%	12	0%	$ 938	0%	6,868	4,611	$ 646,969	$ 94	$ 140
New - LED A-Lamps	Each	64,557	86%	10,983	90%	$ 954,430	86%	10,579	14%	1,158	10%	$ 155,511	14%	75,136	12,141	$ 1,109,942	$ 15	$ 91
New - LED R/BR Lamps	Each	4,573	83%	1,183	85%	$ 74,195	83%	916	17%	203	15%	$ 14,812	17%	5,489	1,386	$ 89,006	$ 16	$ 64
CAM - Exterior LED Lighting	Fixture	-	0%	-	0%	$ -	0%	704	100%	18	100%	$ 133,026	100%	704	18	$ 133,026	$ 189	$ 7,390
CAM - Exterior LED Lighting - Pool	Lamp	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Exterior LED Lighting - Spa	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
CAM - Interior LED Fixture	Fixture	-	0%	-	0%	$ -	0%	1,291	100%	17	100%	$ 151,981	100%	1,291	17	$ 151,981	$ 118	$ 8,940
CAM - Interior LED Lighting	KiloLumen	-	0%	-	0%	$ -	0%	346	100%	5	100%	$ 34,690	100%	346	5	$ 34,690	$ 100	$ 6,938
CAM - Interior LED Screw-in	Lamp	-	0%	-	0%	$ -	0%	404	100%	11	100%	$ 4,397	100%	404	11	$ 4,397	$ 11	$ 400
CAM - Interior TLED Type A Lamps	Lamp	-	0%	-	0%	$ -	0%	546	100%	13	100%	$ 7,098	100%	546	13	$ 7,098	$ 13	$ 546
CAM - Interior TLED Type C Lamps	Lamp	-	0%	-	0%	$ -	0%	848	100%	16	100%	$ 23,617	100%	848	16	$ 23,617	$ 28	$ 1,476
CAM - Interior LED Exit Sign	Fixture	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Miscellaneous																		
Smart Strip	Each	1,009	78%	1,009	78%	$ 45,747	70%	287	22%	287	22%	$ 19,922	30%	1,296	1,296	$ 65,669	$ 51	$ 51
Smart Strip Tier II	Each	2,861	87%	2,861	87%	$ 242,052	83%	439	13%	439	13%	$ 51,033	17%	3,300	3,300	$ 293,085	$ 89	$ 89
Pool Pumps	Each	1	50%	1	50%	$ 2,150	53%	1	50%	1	50%	$ 1,937	47%	2	2	$ 4,087	$ 2,044	$ 2,044
CAM - Tier-2 Smart Power Strip	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
CAM - Variable Speed Pool Pump	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Ancillary Services																		
Commissioning	Home		0%		0%		0%	-	0%		0%	$ -	0%	-	-	$ -	$ -	$ -
CAM - Audit	Home		0%		0%		0%	10	100%		0%	$ 11,856	100%	10	-	$ 11,856	$ 1,186	$ -
Customer Enrollment																		
ESA In-Home Energy Education	Home	12,217	89%	12,217	89%	$ 373,323	90%	1,452	11%	1,452	11%	$ 42,901	10%	13,669	13,669	$ 416,224	$ 30	$ 30
ESA Outreach & Assessment	Home	12,227	89%	12,227	89%	$ 1,987,708	92%	1,457	11%	1,457	11%	$ 171,897	8%	13,684	13,684	$ 2,159,605	$ 158	$ 158

[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.
[2] Includes 22 ESA CAM properties treated in 2021.

Note: The financial table above excludes $3,412 of expenditures paid in April 2022 for services related to the 2021 program year due to the timing for the preparation of the 2021 Annual Report.

	A	B	C	D	E
1	**SDG&E PY 2021 Energy Savings Assistance Program Annual Report** **ESAP Table 7** **Expenditures Recorded by Cost Element**				
2	**ESA Program:**	**Labor**	**Non-Labor**	**Contractor**	**Total**
3	Energy Efficiency				
4	Appliances	$ -	$ 1,397	$ 561,183	$ 562,580
5	Domestic Hot Water	$ -	$ -	$ 1,323,074	$ 1,323,074
6	Enclosure	$ -	$ -	$ 2,206,706	$ 2,206,706
7	HVAC	$ -	$ -	$ 2,427,582	$ 2,427,582
8	Maintenance	$ -	$ -	$ 134,700	$ 134,700
9	Lighting	$ -	$ -	$ 2,273,152	$ 2,273,152
10	Miscellaneous	$ -	$ -	$ 405,003	$ 405,003
11	Customer Enrollment	$ -	$ -	$ 2,160,765	$ 2,160,765
12	In Home Education	$ -	$ -	$ 416,224	$ 416,224
13	Contractor Advanced Funds [1]	$ -	$ -	$ (379,675)	$ (379,675)
14	Pilot	$ -	$ -	$ -	$ -
15	Multi-Family Common Area Measures	$ 49,489	$ 449,016	$ 784,004	$ 1,282,509
16	Leveraging	$ -	$ -	$ -	$ -
17	**Energy Efficiency TOTAL**	**$ 49,489**	**$ 450,413**	**$ 12,312,718**	**$ 12,812,620**
18					
19	Training Center	$ 40,698	$ 4,788	$ -	$ 45,486
20	Workforce Education and Training	$ -	$ -	$ -	$ -
21	Inspections	$ 148,107	$ 6,927	$ -	$ 155,034
22	Marketing and Outreach	$ 2,046	$ 698,462	$ -	$ 700,508
23	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -
24	Measurement and Evaluation Studies	$ 87	$ 54,352	$ -	$ 54,439
25	Regulatory Compliance	$ 190,483	$ 22,985	$ -	$ 213,468
26	General Administration	$ 1,406,524	$ 393,611	$ 1,236	$ 1,801,371
27	CPUC Energy Division	$ -	$ 36,393	$ -	$ 36,393
28	SPOC	$ 17,990	$ -	$ -	$ 17,990
29		$ -	$ -	$ -	$ -
30					
31	**TOTAL PROGRAM COSTS**	**$ 1,855,424**	**$ 1,667,931**	**$ 12,313,954**	**$ 15,837,309**
32					
33	[1] Negative amount represents repayments from contractors of the advance funds issued in 2020 that were not eligible for Post-Pandemic Return to Service (PRPS) credits.				
34					
35	Note: The total program costs above is also the sum of ESA Table 1 and ESA Table 1A.				
36	Note: The financial table above excludes $3,412 of expenditures paid in April 2022 for services related to the 2021 program year due to the timing for the preparation of the 2021 Annual Report.				

	A	B	C	D	E	F	G	H
1	**SDG&E PY 2021 Energy Savings Assistance Program Annual Report ESAP Table 8 ESAP Homes Unwilling / Unable to Participate [1]**							
2	**Reason Provided**							
3	**County**	**Customer Unwilling/Declined Program Measures**	**Customer Unavailable - Scheduling Conflicts**	**Hazardous Environment (unsafe/unclean)**	**Landlord Refused to Authorize Participation**	**Household Income Exceeds Allowable Limits**	**Unable to Provide Required Documentation**	**Other Infeasible/ Ineligible**
4	SAN DIEGO	9,968	16,827	10	-	2,789	545	2,051
5	ORANGE	236	64	2	-	66	16	75
6	**Total**	**10,204**	**16,891**	**12**	**-**	**2,855**	**561**	**2,126**
7								
8								
9	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.							
10								
11	**ESAP Coordinated Treatment (SCE and SCG only)**							
12		**Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency [1]**						
13	**# of Households Received Measures from one Utility, but not other Utility or Partnering Agency**	**# of Customer Unwilling/Declined Program Measures**	**# of Customer Unavailable - Scheduling Conflicts**	**# of Hazardous Environment (unsafe/unclean)**	**# of Landlord Refused to Authorize Participation**	**# of Other Infeasible/ Ineligible**		
14								
15								
16	**Total**	**-**	**-**	**-**	**-**	**-**		
17								
18								
19	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.							
20								

	A	B	C	D	E	F	G
1	**SDG&E PY 2021 Energy Savings Assistance Program Annual Report** **ESAP Table 9** **Life Cycle Bill Savings by Measure**						
2	**Measure Name**	**Unit**	**2021 Number Installed**	**Per Measure Electric Impact (kWh)**	**Per Measure Gas Impact (Therms)**	**Effective Useful Life (years)**	**2021 Total Measure Life Cycle Bill Savings**
3	**Appliances**						
4	High Efficiency Clothes Washer	Each	134	10.55	17.77	11	$ 42,446
5	Refrigerator	Each	476	605.74		14	$ 888,069
6	Microwave	Each	-				
7	**Domestic Hot Water**						
8	Other Domestic Hot Water	Home	4,091	5.64	3.02	10	$ 234,943
9	Water Heater Tank and Pipe Insulation	Home	518		0.62	9	$ 4,291
10	Water Heater Repair/Replacement	Each	1,560		24.17	11	$ 617,870
11	Combined Showerhead/TSV	Each	89	4.54	5.77	10	$ 8,536
12	New - Heat Pump Water Heater	Each	-				
13	New - Tub Diverter/ Tub Spout	Each	19	-	2.00	10	$ 566
14	New - Thermostat-controlled Shower Valve	Each	-				
15	**Enclosure**						
16	Air Sealing / Envelope	Home	4,372	20.41	0.49	3	$ 68,414
17	Caulking	Home	-				
18	Attic Insulation	Home	135	64.15	31.76	20	$ 165,857
19	**HVAC**						
20	FAU Standing Pilot Conversion	Each	3	-	10.00	20	$ 894
21	Furnace Repair/Replacement	Each	1,721	-	(18.88)	20	$ (968,503)
22	Room A/C Replacement	Each	114	(65.26)		9	$ (14,731)
23	Central A/C replacement	Each	-				
24	Heat Pump Replacement	Each	-				
25	Evaporative Cooler (Replacement)	Each	-				
26	Evaporative Cooler (Installation)	Each	-				
27	Duct Test and Seal	Home	159	-	5.25	3	$ 3,728
28	New - Energy Efficient Fan Control	Home	-				
29	New - Prescriptive Duct Sealing	Home	-				
30	New - High Efficiency Forced Air Unit (HE FAU)	Home	-				
31	New - A/C Time Delay	Home	-				
32	New - Smart Thermostat	Home	283	120.34	5.94	9	$ 89,966
33	**Maintenance**						
34	Furnace Clean and Tune	Home	1,704	-	(2.07)	3	$ (15,757)
35	Central A/C Tune-up	Home	-				
36	**Lighting**						
37	Interior Hard wired LED fixtures	Each	4,426	4.23	(0.08)	16	$ 57,815
38	Exterior Hard wired LED fixtures	Each	2,113	5.14	-	16	$ 38,230
39	LED Torchiere	Each	6,868	4.23	(0.08)	16	$ 89,810
40	Occupancy Sensor	Each	-				
41	LED Night Light	Each	-				
42	New - LED R/BR Lamps	Each	5,489	3.02	(0.05)	16	$ 51,488
43	New - LED A-Lamps	Each	75,136	2.12	(0.04)	16	$ 495,085
44	**Miscellaneous**						
45	Pool Pumps	Each	2	1,048.00	-	10	$ 4,611
46	Smart Strip	Each	1,296	140.00		5	$ 199,584
47	Smart Strip Tier II	Each	3,298	140.00		5	$ 507,892
48	**Pilots**						
49							
50							
51	**Total**						$ 2,571,105
52							
53	**Total Homes Served By the Program**	13,658					
54	**Life Cycle Bill Savings Per Home**	$ 188					
55							
56	This table includes ESA treated homes only. ESA CAM properties are not included.						
57	Savings estimates are sourced from the PY 2015 to 2017 ESA Impact Evaluation; Energy Division instructed the IOUs to use these results for 2019 and 2020 savings estimates.						
58	Per measure kWh and therm impacts are presented as total kWh savings divided by total participants and total therm savings divided by total participants.						
59							
60							

	A	B	C
1	**SDG&E PY 2021 Energy Savings Assistance Program Annual Report** **ESAP Table 10** **Energy Rate Used for Bill Savings Calculations [1]**		
2	Year	$/kWh	$/Therm
3	2021	0.22	1.49
4	2022	0.22	1.53
5	2023	0.23	1.58
6	2024	0.24	1.63
7	2025	0.24	1.68
8	2026	0.25	1.73
9	2027	0.26	1.78
10	2028	0.27	1.83
11	2029	0.27	1.89
12	2030	0.28	1.94
13	2031	0.29	2.00
14	2032	0.30	2.06
15	2033	0.31	2.12
16	2034	0.32	2.19
17	2035	0.33	2.25
18	2036	0.34	2.32
19	2037	0.35	2.39
20	2038	0.36	2.46
21	2039	0.37	2.53
22	2040	0.38	2.61
23	2041	0.39	2.69
24	2042	0.40	2.77
25	2043	0.41	2.85
26	2044	0.43	2.94
27	2045	0.44	3.03
28			
29	[1] For 2021, the average costs per kWh and therm paid by ESA participants were calculated from billing records. For remaining years, the values are escalated by 3%. Only the 2021 values are used to calculate lifecycle bill savings for this report.		
30			

	A	B	C	D	E
1	**SDG&E PY 2021 Energy Savings Assistance Program Annual Report** **ESAP Table 11** **Bill Savings Calculations by Program Year**				
2	**Program Year**	**Program Costs**	**Program Lifecycle Bill Savings**	**Program Bill Savings/ Cost Ratio**	**Per Home Average Lifecycle Bill Savings**
3	2011	$ 20,950,509	$ 11,372,235	0.54	$ 504
4	2012	$ 21,046,806	$ 10,325,509	0.49	$ 461
5	2013	$ 17,874,649	$ 7,897,313	0.44	$ 450
6	2014	$ 19,143,282	$ 9,030,922	0.47	$ 410
7	2015	$ 17,355,596	$ 5,632,584	0.32	$ 279
8	2016	$ 17,511,142	$ 5,435,882	0.31	$ 275
9	2017	$ 30,649,505	$ 5,891,654	0.19	$ 272
10	2018	$ 22,780,528	$ 15,889,992	0.70	$ 743
11	2019	$ 18,146,973	$ 2,988,782	0.16	$ 184
12	2020	$ 12,620,852	$ 2,315,240	0.18	$ 198
13	2021	$ 14,510,984	$ 2,571,105	0.18	$ 188
14					
15	2020 Program Costs do not include $907,821 advanced to contractors.				

SDG&E PY 2021 Energy Savings Assistance Program Annual Report
ESAP Table 12
Fund Shifting [1]

	Date	Program Year 2021	Budget [2] Electric	Budget [2] Gas	Budget [2] Total Authorized	Expenditures Electric	Expenditures Gas	Expenditures Total Expenditures	(Shift) or Carried Forward (Budget - Expenditures = Variance) [6] Variance Electric	Variance Gas	Variance Total	FUND SHIFT AMOUNT: Among Categories within Program Year 1-3 (1) Shift of Current Year Authorized Electric	(1) Gas	(1) Total	Carry Forward from 2020 (2) Shift of Carry Forward Electric	(2) Gas	(2) Total	Carry Back from 2022 (3) Shift of Carry Back Electric	(3) Gas	(3) Total	Total Shifted Gas/ Electric [4]	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization
		ESA Program:	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	(Ex,xxx)	x%				G-xxxx, D.xx- xx-xxx
		Energy Efficiency																								
	12/31/2021	Appliance [6]	$ 1,166,517	$ 139,093	**$ 1,305,610**	$ 489,753	$ 72,828	**$ 562,580**	$ 676,764	$ 66,266	**$ 743,030**	$ (392,571)	$ -	**$ (392,571)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (392,571)	1.4%	1. Current Year Authorized 2. 3.	1. 2021 2. 3.	1. Fund shift from Appliance to Lighting subcategory.	1. D.21-06-015 2. 3.
		Domestic Hot Water	$ 60,260	$ 1,948,398	**$ 2,008,658**	$ 39,692	$ 1,283,382	**$ 1,323,074**	$ 20,568	$ 665,016	**$ 685,584**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Enclosure	$ 1,585,520	$ 2,101,736	**$ 3,687,256**	$ 948,884	$ 1,257,823	**$ 2,206,706**	$ 636,636	$ 843,913	**$ 1,480,550**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	12/31/2021	HVAC [6]	$ 1,389,128	$ 1,344,718	**$ 2,733,846**	$ 220,826	$ 2,206,756	**$ 2,427,582**	$ 1,168,303	$ (862,039)	**$ 306,264**	$ (862,039)	$ 862,039	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. Current Year Authorized 2. 3.	1. 2021 2. 3.	1. Shift of funds from Electric to Gas 2. 3.	1. D.21-06-015 2. 3.
		Maintenance	$ -	$ -	**$ -**	$ -	$ 134,700	**$ 134,700**	$ -	$ (134,700)	**$ (134,700)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	12/31/2021	Lighting [6]	$ 1,880,580	$ -	**$ 1,880,580**	$ 2,273,152	$ -	**$ 2,273,152**	$ (392,571)	$ -	**$ (392,571)**	$ 392,571	$ -	**$ 392,571**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 392,571	-1%	1. Current Year Authorized 2. 3.	1. 2021 2. 3.	1. Fund shift from Appliance to Lighting subcategory.	1. D.21-06-015 2. 3.
		Miscellaneous	$ 661,118	$ -	**$ 661,118**	$ 405,003	$ -	**$ 405,003**	$ 256,115	$ -	**$ 256,115**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Customer Enrollment	$ 1,738,716	$ 1,738,716	**$ 3,477,433**	$ 1,080,383	$ 1,080,383	**$ 2,160,765**	$ 658,334	$ 658,334	**$ 1,316,667**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		In Home Education	$ 319,367	$ 319,367	**$ 638,733**	$ 208,112	$ 208,112	**$ 416,224**	$ 111,254	$ 111,255	**$ 222,509**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Contractor Advanced Funds	$ -	$ -	**$ -**	$ (189,837)	$ (189,837)	**$ (379,675)**	$ 189,837	$ 189,837	**$ 379,675**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Pilot	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Multi-Family Common Area Measures [9]	$ 2,772,018	$ 2,772,018	$ 5,544,035	$ 773,855	$ 508,654	$ 1,282,509	$ 1,998,162	$ 2,263,363	**$ 4,261,526**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Leveraging	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Energy Efficiency TOTAL	**$ 11,573,224**	**$ 10,364,045**	**$ 21,937,269**	**$ 6,249,822**	**$ 6,562,799**	**$ 12,812,621**	**$ 5,323,402**	**$ 3,801,246**	**$ 9,124,648**	**$ (862,039)**	**$ 862,039**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Training Center	$ 101,587	$ 101,587	**$ 203,173**	$ 22,743	$ 22,743	**$ 45,486**	$ 78,844	$ 78,843	**$ 157,687**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Workforce Education and Training	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Inspections	$ 79,993	$ 79,993	**$ 159,985**	$ 77,517	$ 77,517	**$ 155,033**	$ 2,476	$ 2,476	**$ 4,952**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. . 3.	1. 2. 3.
		Marketing and Outreach	$ 496,564	$ 496,564	**$ 993,128**	$ 350,254	$ 350,254	**$ 700,508**	$ 146,310	$ 146,310	**$ 292,620**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Statewide ME&O	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		M&E Studies [9]	$ 159,965	$ 159,965	**$ 319,930**	$ 27,220	$ 27,220	**$ 54,439**	$ 132,745	$ 132,745	**$ 265,490**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Regulatory Compliance	$ 146,709	$ 146,709	**$ 293,418**	$ 106,734	$ 106,734	**$ 213,468**	$ 39,975	$ 39,975	**$ 79,950**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		General Administration	$ 1,537,294	$ 1,537,294	**$ 3,074,588**	$ 900,686	$ 900,684	**$ 1,801,370**	$ 636,608	$ 636,610	**$ 1,273,218**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		CPUC Energy Division	$ 25,392	$ 25,392	**$ 50,783**	$ 18,196	$ 18,196	**$ 36,393**	$ 7,195	$ 7,195	**$ 14,390**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		SPOC	$ 39,300	$ 39,300	**$ 78,599**	$ 8,995	$ 8,995	**$ 17,991**	$ 30,304	$ 30,304	**$ 60,608**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		TOTAL PROGRAM COSTS	**$ 14,160,026**	**$ 12,950,847**	**$ 27,110,873**	**$ 7,762,167**	**$ 8,075,142**	**$ 15,837,309**	**$ 6,397,859**	**$ 4,875,706**	**$ 11,273,564**	**$ (862,039)**	**$ 862,039**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**0.0%**				
		Carryforward from 2020 and prior years [8,9]	$ 21,402,025	$ 16,338,488	$ 37,740,513	$ 7,762,167	$ 8,075,142	$ 15,837,309	$ 13,639,858	$ 8,263,346	$ 21,903,204				$ 13,639,858	$ 8,263,346	$ 21,903,204									
		Approved Budget for Unspent Funds in 2021 [3, 4]	$ 2,826,358	$ 2,826,358	$ 5,652,715	$ 795,763	$ 530,562	$ 1,326,325	$ 2,030,595	$ 2,295,796	$ 4,326,390				$ 2,030,595	$ 2,295,796	$ 4,326,390									
		TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	**$ 32,735,693**	**$ 26,462,977**	**$ 59,198,670**	**$ 6,988,312**	**$ 7,544,580**	**$ 14,510,984**	**$ 25,747,381**	**$ 18,918,397**	**$ 44,687,686**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**					

[1] Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 20.1 of D.08-11-031 as modified by D.10-10-008, 16-11-022, D.17-12-009, and D.21-06-015.

[2] Energy Division approved the 2021 authorized budget through SDG&E Advice Letter 3612-E/2905-G for January through June 2021 and D.21-06-015 approved for July through December. See Attachment 1 Table 11 of D.21-06-015.

[3] D.19-06-022 directs the IOUs to use unspent and uncommitted ESA CAM for program year 2021. The unspent funds remaining at the end of December 31, 2020 is $5,544,035, to be used for January-June 2021. D.21-06-015 directs the IOUs to carry-forward all unspent and uncommitted ESA common area measures funding as of June 30, 2021 into the remainder of program year 2021 and 2022.

[4] Includes budget for the Rapid Feedback Study efforts which authorized $200,000 the 2017-2020 program cycle (D.16-11-022 as modified by D.17-12-009).

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

[6] In D.21-06-015, the Commission revised the fund shift rules allowing flexibility to shift funds between the categories and fuel type.

[7] SDG&E's unspent/over-collected funds at the end of 2016 totaled $23,322,672.

[8] Represents SDG&E's ESA Program electric and gas balancing accounts which is comprised of 2009-2016 unspent funds, plus 2017-2021 unspent funds. The unspent balance as of December 31, 2020, is an overcollection of $37,740,513.

[9] 2021 expenditures represent amortization of prior years unspent overcollect funds. The Commission directs the Investor-Owned Utilities (IOUs) to use unspent ESA Program funds to achieve program and policy objectives and to offset future revenue collections. Consistent with this directive, in 2021, SDG&E partially offset its revenue collections by $15,837,309 using ESA Program unspent electric funds of $7,762,16720 and gas funds of $8,075,142.

Note: The financial table above excludes $3,412 of expenditures paid in April 2022 for services related to the 2021 program year due to the timing for the preparation of the 2021 Annual Report.

Note: Supplemental Table below shows the cumulative unspent and overcollected funds available to offset future revenue collections

	Electric	Gas	Total
Total Unspent/Over-collected Funds available from 2016 and prior years [7]	$ 12,313,334	$ 11,009,338	$ 23,322,672
Net Activity for 2017 - over collection / (undercollection)	$ 5,438,620	$ (315,786)	$ 5,122,834
Total Unspent/Overcollected Funds Available 2017	**$ 17,751,954**	**$ 10,693,552**	**$ 28,445,506**
Net Activity for 2018 - over collection	$ 3,025,816	$ 5,606,088	$ 8,631,904
Total Unspent/Overcollected Funds Available 2018	**$ 20,777,770**	**$ 16,299,640**	**$ 37,077,410**
Net Activity for 2019 - (under collection)	$ (3,645,617)	$ (2,147,148)	$ (5,792,765)
Total Unspent/Overcollected Funds Available 2019	**$ 17,132,153**	**$ 14,152,492**	**$ 31,284,645**
Net Activity for 2020 - over collection	$ 4,269,872	$ 2,185,995	$ 6,455,868
Total Unspent/Overcollected Funds Available 2020	**$ 21,402,025**	**$ 16,338,488**	**$ 37,740,513**
Net Activity for 2021 - (under collection)	$ (6,647,701)	$ (5,410,116)	$ (12,057,817)
Total Unspent/Overcollected Funds Available 2021	**$ 14,754,324**	**$ 10,928,372**	**$ 25,682,696**
Less: Unspent Committed funds for Multi-Family Common Area Measures and Rapid Feedback Study as of December 31, 2021 (ESA Table 1A)	$ 2,030,595	$ 2,295,796	$ 4,326,390
Total Unspent/Uncommitted/Overcollected Funds Available to Offset Future Revenue Collections as of December 31, 2021.	**$ 12,723,729**	**$ 8,632,576**	**$ 21,356,305**

	A	B
1	**SDG&E PY 2021 Energy Savings Assistance Program Annual Report**	
2	**ESAP Table 13**	
3	**Categorical and Other Enrollment [1]**	
4		
5	**Type of Enrollment**	**Number of Homes Treated**
6	Women, Infants, and Children Program (WIC)	498
7	Supplemental Security Income (SSI)	496
8	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	1,056
9	CalWORKs/Temporary Assistance for Needy Families (TANF)	66
10	Tribal TANF	
11	Medicaid/Medi-Cal for Families	757
12	Healthy Families A&B	199
13	National School Lunch Program (NSLP) - Free Lunch	56
14	Low-income Home Energy Assistance Program (LIHEAP)	352
15	Bureau of Indian Affairs General Assistance	3
16	Head Start Income Eligible - (Tribal Only)	
17	CARE Income Certified	268
18	80/20	1
19	Targeted Self Certification	5,905
20	Standard Enrollment	4,001
21	**Total**	**13,658**
22		
23	[1] Summary data which includes ESA Program and CSD Leveraging efforts.	
24	Note: Does not include MF common area efforts.	
25		

SDG&E PY 2021 Energy Savings Assistance Program Annual Report
ESAP Table 14
Leveraging & Integration [1][6]

Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria [7]	If not, Explain
LIHEAP	SDG&E's partners with local CSD agencies to enroll eligible LIHEAP bill assistance customers in the ESA Program. ESA expanded efforts which allowed LIHEAP agencies to preform outreach and assessment services.	Y	Y	NA	kWh: 77,706 kW: 10 Therms: 219	NA	827	Sum of savings per treated homes identified as having LIHEAP agency as the source of the enrollment.	No	We are unable to accurately track dollars saved from this effort.
CSD	Data sharing effort providing CSD with customer usage information for CSD client receiving weatherization service and payment assistance	Y	Y	NA	NA	NA	NA	NA	No	We are unable to accurately track dollars saved, enrollments and savings from this effort.
SASH	Leveraging partnership with GRID where SDG&E received list of potential ESA Leads. Lead generated ESA Program enrollments.	Y	Y	N/A	NA	N/A	NA	NA	No	SDG&E did not receive any enrollments from this effort.
SDCWA	Partnership to leverage installation of customers receiving water saving measures in SDCWA service territory. SDCWA provides rebates to SDG&E for measures.	Y	Y	$ 55,030	NA	NA	NA	Internal order used to track rebated dollars received through from SDCWA.	No	We are unable to track the savings from this effort.
CARE/Medical Baseline	Marketing to customers enrolled in CARE and/or Medical Baseline	N	N	NA	kWh: 1,106 kW: 0 Therms: 54	NA	6	Sum of savings per treated homes identified as having CARE or Medical Baseline as lead source.	No	We are unable to accurately track dollars saved from this effort.
CARE High Usage	Automated Lead Generation for CARE High Usage Verification Process	N	N	NA	kWh: 22,890 kW: 2 Therms: -337	NA	262	Sum of savings per treated homes identified as having CARE High Usage as lead source.	No	We are unable to accurately track dollars saved from this effort.

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

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

[3] Annual Energy savings/benefits for measures installation in 2021. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.

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

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

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

[7] This field represents whether IOU is able to capture all of the data across the fields for dollars saved, energy saved, enrollments.

Fields not applicable to specific efforts are marked "NA".

	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2021 Energy Savings Assistance Program Annual Report**									
2	**ESAP Table 15**									
3	**Expenditures for Pilots and Studies**									
4										
5		**Authorized 2021 Funding [1]**			**2021 Expenses**			**% of Budget Expensed**		
6		**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
7	**Pilots**									
8										
9										
10										
11	**Total Pilots [3]**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**0%**	**0%**	**0%**
12										
13										
14	**Studies**									
15										
16	Low Income Needs Assessment Study [1]	$ 105,625	$ 105,625	$ 211,250	$ 5,312	$ 5,312	$ 10,624	5%	5%	5%
17	Rapid Feedback Research and Analysis [2]	$ 54,340	$ 54,340	$ 108,680	$ 21,908	$ 21,908	$ 43,816	40%	40%	40%
18										
19	**Total Studies**	**$159,965**	**$159,965**	**$319,930**	**$27,220**	**$27,220**	**$54,439**	**17%**	**17%**	**17%**
20										
21	[1] Reflects authorized budget in D.21-06-015, Attachment 1 Table 11. The budget and expenditures are also shown on ESA Table 1.									
22	[2] Budget represents remaining unspent funds shown in ESA Table 1A for the Rapid Feedback Study efforts which authorized $200,000 the 2017-2020 program cycle (D.16-11-022 as modified by D.17-12-009).									
23	[3] There were no Pilots in 2021.									

	A	B	C	D	E
1	**SDG&E PY 2021 Energy Savings Assistance Program Annual Report**				
2	**ESAP Table 16**				
3	**Miscellaneous (2nd Refrigerators, Education Only, A/C Cycling, etc.)**				
4					
5	**Measures**	**Units**	**Received Refrigerator**	**Not eligible for Refrigerator due to Less than Six Occupants**	
6					
7	Second Refrigerators	Each	0	0	
8					
9					
10					
11	**Measures**	**Units**	**Households that Only Received Education**		
12					
13	In-Home Education	Home	360		
14					
15					
16	**Households for My Energy/My Account Platform**			**Households that Received ESA Program Measures and Elect to:**	
17	**Opt-Out**	**Already Enrolled**	**Opt-In**	**Opt-In to a New Program (DR or alternative tariff)**	
18	9,905	6,062	476	NA	
19					
20					
21					
22	**Households Received A/C Cycling Controls when A/C**				
23		# Installed			
24	A/C Cycling controls	NA			
25					
26					

SDG&E PY 2021 Energy Savings Assistance Program Annual Report									
ESAP Table 17									
Contractor Advanced Funding and Repayment									
			B-C			E x F			(B)-(cumulative H + cumulative I)
	Total Advanced Amount [7]	Total Advance Eligible for PPRS Credit [1]	Total Advance Not Eligible for PPRS Credit	Percentage for PPRS Credit Calculation [2]	Total Contractor Invoices each month [3, 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	$ 542,576
Mar-21	$ -				$ 420,113	$ 110,655	$ 48,888	$ 7,647	$ 486,041
Apr-21	$ -				$ 97,454	$ 38,982	$ 10,331	$ 2,668	$ 473,042
May-21	$ -				$ 159,178	$ 38,339	$ -	$ 1,000	$ 472,042
Jun-21	$ -				$ -	$ -	$ 263,419	$ -	$ 208,623
Jul-21	$ -				$ -	$ -	$ -	$ 3,115	$ 205,508
Aug-21	$ -				$ -	$ -	$ 205,509	$ (1)	$ -
Sep-21	$ -				$ -	$ -	$ -	$ -	$ -
Oct-21	$ -				$ -	$ -	$ -	$ -	$ -
Nov-21	$ -				$ -	$ -	$ -	$ -	$ -
Dec-21	$ -	$ 528,147	$ 640,894	40%	$ -		$ -	$ -	$ -
Total	**$ 1,169,041**	**$ 528,147**	**$ 640,894**	**40%**	**$ 1,718,806**	**$ 544,778**	**$ 528,147**	**$ 640,894**	$ -

IOUs - Do not delete footnotes 1-6 below.

[1] Contractor labor and labor-related costs. Post-Pandemic Return to Service (PPRS) credit eligible.

[2] 40% for PPRS credit calculation from Joint Tier 2 Advice Letter 5654-G filed on June 29, 2020.

[3] For work performed during PPRS credit-earning period for contractors receiving advances. SDG&E PPRS earning period began December 1, 2020.

[4] Based on total monthly contractor invoices, up to maximum allowable for each contractor.

[5] Credits may be applied at a later date than earned depending on the contractor repayment schedule. This value should not exceed column G.

[6] Includes repayments processed for which PPRS credits were not applied, including contractor payments returned unused due to agreement termination or 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.

SDG&E PY 2021 Energy Savings Assistance Program Annual Report		
ESAP Table 18		
ESAP Tribal Outreach		
OUTREACH STATUS	**Quantity (Includes CARE, FERA, and ESA)**	**List of Participating Tribes**
Tribes completed ESA Meet & Confer	7	Barona, Jamul IndianVillage, Pauma Band, Rincon, Ewiiaapaayap, Sycuan Band of Kumeyaay Nation, Viejas Band of Kumeyaay Indiands
Tribes requested outreach materials or applications	1	Pauma Band
Tribes who have not accepted offer to Meet and Confer	10	San Pasqual, La Posta, Campo Kumeyaay Nation, Inaja & Cosmit, La Jolla, Pala Band, Santa Ysabel, Manzanita, Los Coyotes, Mesa Grande
Non-Federally Recognized Tribes who participated in Meet & Confer [1]	N/A	N/A
Tribes and Housing Authority sites involved in Focused Project/ESA	N/A	N/A
Partnership offer on Tribal Lands	N/A	N/A
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls) [2]	2	Southern California American Indian Resource Center (SCAIR); Southern California Tribal Chairmen's Association (SCTCA)
Housing Authority and TANF offices who participated in Meet and Confer	N/A	N/A

[1] SDG&E has invited all 17 tribes to meet and confer and will continue to engage throughout 2022.

[2] SDG&E provides TANF related messaging through periodic presentations to SCAIR and SCTCA.

SDG&E PY 2021 Energy Savings Assistance Program Annual Report

ESAP Table 19

Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions

ESA Main (SF, MH, MF in-unit)

Customer Segments	# of Households Eligible	# of Households Treated [3]	Enrollment Rate = (C/B)	# of Households Contacted [2]	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures) [4]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures) [4]	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households	Avg. Household Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg.Household Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type [1]													
SF	138,230	5,130	4%	5,390	95%	86.893	108.300	0.012	-1.5982	2.224	916.052	N/A	N/A
MH	19,387	1,314	7%	25,718	5%	105.448	166.038	0.012	13.0231	1.091	1123.915	N/A	N/A
MF In-Unit	158,813	7,214	5%	6,812	106%	61.201	62.368	0.008	0.3906	0.275	387.771	N/A	N/A
Rent vs. Own													
Own	109,547	3,713	3%	37,966	10%	92.321	141.419	0.012	2.4479	2.333	1150.300	N/A	N/A
Rent	207,737	9,945	5%	21,931	45%	68.960	69.836	0.009	0.6179	0.611	431.733	N/A	N/A
Previous vs. New Participant													
Previous [5]	N/A	9,006	N/A	41,844	22%	67.084	77.107	0.009	1.1677	1.052	671.210	N/A	N/A
New Participant	N/A	4,652	N/A	66,023	7%	99.949	119.731	0.013	1.6318	1.246	781.945	N/A	N/A
Seniors	131,332	2,337	2%	N/A	X	86.958	117.126	0.011	4.8681	1.303	978.330	N/A	N/A
Veterans	32,366	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Hard-to-Reach	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Vulnerable	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Location													
DAC	N/A	2,597	N/A	14,085	18%	59.097	65.426	0.008	1.1286	1.009	607.177	N/A	N/A
Rural	N/A	450	N/A	4,273	11%	96.457	113.268	0.013	3.1576	0.571	620.782	N/A	N/A
Tribal	N/A	78	N/A	925	8%	203.366	215.555	0.025	0.0911	0.278	601.928	N/A	N/A
PSPS Zone	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Wildfire Zone	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Climate Zone 1	N/A	8,766	N/A	70,046	13%	71.596	82.227	0.010	0.6828	1.246	707.022	N/A	N/A
Climate Zone 2	N/A	41	N/A	464	9%	201.485	201.485	0.024	-0.0164	-0.016	557.945	N/A	N/A
Climate Zone 3	N/A	23	N/A	112	21%	210.388	244.050	0.025	6.7816	0.667	757.676	N/A	N/A
Climate Zone 4	N/A	4,742	N/A	34,175	14%	85.496	102.313	0.011	2.4635	0.903	712.633	N/A	N/A
Climate Zone 5	N/A	68	N/A	2,367	3%	258.625	258.625	0.032	0	0	560.216	N/A	N/A
Climate Zone 6	N/A	18	N/A	699	3%	132.816	132.816	0.018	0	0	389.436	N/A	N/A
CARB Communities	N/A	N/A	N/A	N/A	N/A	N/A		N/A	N/A	N/A	N/A	N/A	N/A
Financial													
CARE	293,584	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Disconnected	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Arrearages	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
High Usage	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
High Energy Burden	117,568	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SEVI	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Affordability Ratio	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Health Condition													
Medical Baseline	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Respiratory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Disabled	93,194	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Note:
N/A = Not Available
This is a best effort attempt, N/A values will be addressed in monthly iterations during PY2022 or addressed in a future data request as proposed by the Energy Division.
[1] Housing Type is derived from the enrollment level data which is stored in SDG&E's enrollment system
[2] Based on Leads for PY2021, values marked 'X' are not being tracked on the lead
[3] Households treated is defined as a household where SDG&E has been invoiced and paid for customer enrollments.
[4] Health, Comfort, and Safety (HCS) measures are defined by the "Add Back Measures" ESA Table 16 from the 2020 Low Income Annual Report.
[5] Previous is defined as enrollments that are considered a re-treatment.

Pilot Plus and Pilot Deep [1]

Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Enrollment Rate = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households	Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type			0%		0%								
SF			0%		0%								
MH			0%		0%								
MF In-Unit			0%		0%								
Rent vs. Own			0%		0%								
Own			0%		0%								
Rent			0%		0%								
Previous vs. New Participant			0%		0%								
Seniors			0%		0%								
Veterans			0%		0%								
Hard-to-Reach			0%		0%								
Vulnerable			0%		0%								
Location													
DAC			0%		0%								
Rural			0%		0%								
Tribal			0%		0%								
PSPS Zone			0%		0%								
Wildfire Zone			0%		0%								
Climate Zone 7 (example)			0%		0%								
Climate Zone 10 (example)			0%		0%								
Climate Zone 14 (example)			0%		0%								
Climate Zone 15 (example)			0%		0%								
CARB Communities			0%		0%								
Financial													
CARE			0%		0%								
Disconnected			0%		0%								
Arrearages			0%		0%								
High Usage			0%		0%								
High Energy Burden			0%		0%								
SEVI			0%		0%								
Affordability Ratio			0%		0%								
Health Condition													
Medical Baseline			0%		0%								
Respiratory			0%		0%								
Disabled			0%		0%								

[1] Pilot Plus and Pilot Deep program is planned to be launched in Quarter 3 of 2022 and contractor go live in Quarter 4 of 2022.

	A	B	C	D	E	F	G	H
1	**SDG&E PY 2021 CARE Annual Report**							
2	**CARE Table 1**							
3	**Overall Program Expenses**							
4	**Category**	**Overall Expenditures**		**Total**	**Authorized Budget[1]**	**% of Budget Spent**	**Total Shifted[2]**	**Shifted to/from?**
5		**Electric**	**Gas**					
6	Outreach	$ 1,923,482	$ 260,933	$ 2,184,415	$ 3,214,243	68%		
7	Processing, Certification, Recertification[3]	$ 718,930	$ 97,052	$ 815,982	$ 815,982	100%	$ 250,988	Shifted from IT Programming
8	Post Enrollment Verification[4]	$ 18,242	$ 2,402	$ 20,644	$ 438,896	5%		
9	IT Programming	$ 286,561	$ 38,810	$ 325,371	$ 850,006	38%	$ (269,994)	Shifted to Processing, Certification, Recertification; CPUC Energy Division
10	Pilots	$ 215,358	$ 28,824	$ 244,182	$ 265,000	92%		
11	Measurement & Evaluation	$ 9,348	$ 1,275	$ 10,623	$ 28,125	38%		
12	Regulatory Compliance	$ 258,122	$ 34,983	$ 293,105	$ 300,000	98%		
13	General Administration	$ 447,809	$ 60,565	$ 508,374	$ 625,000	81%		
14	CPUC Energy Division[5]	$ 74,732	$ 10,185	$ 84,917	$ 84,917	100%	$ 19,006	Shifted from IT Programming
15								
16	**TOTAL Program Costs**	**$ 3,952,584**	**$ 535,029**	**$ 4,487,613**	**$ 6,622,169**	**68%**	**$ -**	
17								
18	CARE Rate Discount[6]	**$ 154,978,964**	**$ 19,845,896**	**$ 174,824,860**	**$ 145,472,843**	**120%**	**$ -**	
19	Service Establishment Charge Discount	**$ -**	**$ -**	**$ -**	**$ -**	**0%**	**$ -**	
20								
21	**TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS**	**$ 158,931,548**	**$ 20,380,925**	**$ 179,312,473**	**$ 152,095,012**	**118%**	**$ -**	
22								
23	1. Reflects total authorized funding approved in the D.21-06-015, Attachment 1, Table 2 as adjusted for program year 2021 fund shifts as noted in footnote 2.							
24	2. Reflects fund shift in accordance with the rules set forth in D.08-11-031 as modified by D.10-10-008, D.16-11-022, D.17-12-009, and D.21-06-015 which granted the IOUs authority to shift funds between the CARE program categories.							
25	3. Overage is due to increased application processing combined with transition to the new Customer Information System known as Envision.							
26	4. SDG&E Advice Letter 3516-E-D/2854-G-D implemented COVID-19 emergency customer protections. This Advice Letter suspended all CARE and FERA program removals and discontinued all recertification and verification requests that require customers to provide income verification through June 2021, in accordance with Resolution M-4849.							
27	5. Overage is due to higher expenses for the Energy Division Staff.							
28	6. CARE Rate Discount budget totals reflected in Advice Letters 3620-E and 2923-G, effective January 1, 2021.							

SDG&E PY 2021 CARE Annual Report

CARE Table 2

Enrollment, Recertification, Attrition, & Enrollment Rate

	New Enrollment										Recertification[8]				Attrition (Drop Offs)[7]					Enrollment		Total CARE Participants by Dwelling Type[6]					
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled[5]	Non-Scheduled (Duplicates)	Automatic[5]	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)	SF	MF	MH	Total CARE Participants	Estimated CARE Eligible	Enrollment Rate % (W/X)
	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	3,938	660	413	115	5,126	5,205	0	588	0	588	0	0	0	80	80	5,793	5,125	N/A	N/A	N/A	341,143	293,584	116%
February	11	43	0	54	4,034	695	480	91	5,300	5,354	0	1,234	0	1,234	0	0	0	2,666	2,666	6,588	2,688	N/A	N/A	N/A	343,831	293,584	117%
March	8	32	0	40	2,154	396	129	49	2,728	2,768	21	1,494	2	1,517	0	0	0	3,252	3,252	4,285	-484	N/A	N/A	N/A	343,347	293,584	117%
April	0	36	0	36	4,373	588	233	96	5,290	5,326	0	1,373	0	1,373	0	0	0	10,786	10,786	6,699	-5,460	193,557	97,536	9,703	337,887	293,584	115%
May	0	33	0	33	4,744	505	474	106	5,829	5,862	0	2,988	0	2,988	0	0	0	4,238	4,238	8,850	1,624	194,610	97,908	9,705	339,511	293,584	116%
June	1	51	0	52	4,513	459	440	107	5,519	5,571	8	2,627	0	2,635	0	0	0	4,592	4,592	8,206	979	195,226	98,074	9,730	340,490	293,584	116%
July	0	45	0	45	4,116	537	314	107	5,074	5,119	199	2,442	323	2,964	2	2	9	5,211	5,224	8,083	-105	195,409	97,722	9,678	340,385	293,584	116%
August	0	21	0	21	4,015	333	363	81	4,792	4,813	682	1,985	263	2,930	262	3	37	4,389	4,691	7,743	122	195,582	97,617	9,630	340,507	293,584	116%
September	0	37	0	37	4,926	676	253	80	5,935	5,972	2,500	2,476	729	5,705	3,869	3	177	4,351	8,400	11,677	-2,428	193,459	97,458	9,556	338,079	293,584	115%
October	1	24	0	25	4,743	976	235	115	6,069	6,094	2,946	2,665	247	5,858	9,621	0	179	3,404	13,204	11,952	-7,110	188,580	95,721	9,553	330,969	293,584	113%
November	41	17	0	58	4,265	1,116	360	89	5,830	5,888	2,037	2,163	256	4,456	6,335	5	134	2,331	8,805	10,344	-2,917	186,539	95,010	9,431	328,052	293,584	112%
December	1	6	0	7	5,001	790	464	128	6,383	6,390	2,171	2,526	460	5,157	13,327	2	157	3,452	16,938	11,547	-10,548	180,241	91,883	9,251	317,504	293,584	108%
YTD Total	**91**	**396**	**0**	**487**	**50,822**	**7,731**	**4,158**	**1,164**	**63,875**	**64,362**	**10,564**	**24,561**	**2,280**	**37,405**	**33,416**	**15**	**693**	**48,752**	**82,876**	**101,767**	**-18,514**	**180,241**	**91,883**	**9,251**	**317,504**	**293,584**	**108%**

N/A - Not available

[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.

[5] From March 4, 2020 - June 30, 2021, customers were not required to recertify due to customer protections established in Resolution M-4842 and M-4849. Accordingly, SDG&E has not removed any customers from the CARE program resulting from recertification/failure to recertify. Customers can manually request to recertify but are automatically placed in the COVID protection category.

[6] Due to Customer Information System (CIS) conversion, data not available for first three months of 2021. Data contained in the remaining months (April - Dec) does not fully represent total number of customers by dwelling type as SDG&E is unable to extrapolate from its CIS. SDG&E will continue to refine data for future reports.

[7] In April, post migration of CIS to SAP, SDG&E identified a percentage of customers who were enrolled without an application on file. These customers where counted under the attrition category. A data fix was put in place at the end of June and the customers where counted under total enrollment.

[8] Due to the recertification backlog as described in the Annual Report narrative, recertification totals reflected may not include those pending to be processed.

	A	B	C	D	E	F	G	H	I
1	**SDG&E PY 2021 CARE Annual Report**								
2	**CARE Table 3A - Post-Enrollment Verification Results (Model) 2021**								
3	**Month**	**Total CARE Households Enrolled**	**Households Requested to Verify[1,4]**	**% of CARE Enrolled Requested to Verify Total**	**CARE Households De-enrolled (Due to no response)**	**CARE Households De-enrolled (Verified as Ineligible)[2]**	**Total Households De-enrolled[3]**	**% De-enrolled through Post Enrollment Verification[4]**	**% of Total CARE Households De-enrolled**
4	**January**	341,143	0	0.00%	0	0	0	0%	0.00%
5	**February**	343,831	0	0.00%	0	0	0	0%	0.00%
6	**March**	343,347	0	0.00%	0	0	0	0%	0.00%
7	**April**	337,887	0	0.00%	0	0	0	0%	0.00%
8	**May**	339,511	0	0.00%	0	0	0	0%	0.00%
9	**June**	340,490	0	0.00%	0	0	0	0%	0.00%
10	**July**	340,385	1,491	0.44%	1,072	19	1,091	73%	0.32%
11	**August**	340,507	2,519	0.74%	1,913	24	1,937	77%	0.57%
12	**September**	338,079	1,558	0.46%	1,241	17	1,258	81%	0.37%
13	**October**	330,969	218	0.07%	171	2	173	79%	0.05%
14	**November**	328,052	281	0.09%	237	1	238	85%	0.07%
15	**December**	317,504	227	0.07%	155	1	156	69%	0.03%
16	**YTD Total**	**317,504**	**6,294**	**1.98%**	**4,789**	**64**	**4,853**	**77%**	**1.53%**
17									
18	[1] Includes all customers who failed SDG&E's CARE eligibility probability model.								
19	[2] Includes customers verified as over income or who requested to be de-enrolled.								
20	[3] Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.								
21	[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.								
22									
23	**SDG&E PY 2021 CARE Annual Report**								
24	**CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)**								
25									
26	**Month**	**Total CARE Households Enrolled**	**Households Requested to Verify [1,4]**	**% of CARE Enrolled Requested to Verify Total**	**CARE Households De-enrolled (Due to no response)**	**CARE Households De-enrolled (Verified as Ineligible) [2]**	**Total Households De-enrolled [3]**	**% De-enrolled through HUV Post Enrollment Verification**	**% of Total CARE Households De-enrolled**
27	**January**	341,143	2	0.00%	0	0	0	0%	0.00%
28	**February**	343,831	0	0.00%	0	0	0	0%	0.00%
29	**March**	343,347	46	0.01%	0	0	0	0%	0.00%
30	**April**	337,887	6	0.00%	0	0	0	0%	0.00%
31	**May**	339,511	13	0.00%	0	0	0	0%	0.00%
32	**June**	340,490	0	0.00%	0	0	0	0%	0.00%
33	**July**	340,385	5,696	1.67%	4,592	49	4,641	81%	1.36%
34	**August**	340,507	5,377	1.58%	4,502	39	4,541	84%	1.33%
35	**September**	338,079	2,039	0.60%	1,760	7	1,767	86%	0.52%
36	**October**	330,969	618	0.19%	524	4	528	85%	0.16%
37	**November**	328,052	289	0.09%	248	5	253	86%	0.08%
38	**December**	317,504	904	0.28%	789	2	791	84%	0.24%
39	**YTD Total**	**317,504**	**14,990**	**4.72%**	**12,415**	**106**	**12,521**	**84%**	**3.94%**
40									
41	[1] Includes all participants who were selected for high usage verification process.								
42	[2] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.								
43	[3] Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.								
44	[4] Between March 4, 2020 through June 30, 2021, CARE customers were not required to complete the PEV and HEU PEV process due to customer protections established in Resolution M-4842 and M-4849. Accordingly, SDG&E has not removed any customers from the CARE program resulting from failure to PEV.								

	A	B	C	D	E	F	G
1	**SDG&E PY 2021 CARE Annual Report**						
2	**CARE Table 4**						
3	**CARE Self-Certification and Self-Recertification Applications[1]**						
4		**Provided**	**Received[2]**	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**
5	Total (Y-T-D)	37,459	110,008	73,919	7,782	1,254	27,053
6	Percentage		100%	67%	7%	1%	25%
7							
8	[1] Includes CARE\FERA Applications and Expanded CARE Applications.						
9	[2] Due to the recertification backlog as described in the Annual Report narrative, recertification totals reflected may not include those pending to be processed.						

	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2021 CARE Annual Report**									
2	**CARE Table 5**									
3	**CARE Enrollment by County**									
4	**County**	**Estimated Eligible**			**Total Participants**			**Enrollment Rate**		
5		**Urban**	**Rural [1]**	**Total**	**Urban**	**Rural**	**Total**	**Urban**	**Rural**	**Total**
6	Orange	18,944	0	18,944	13,702	0	13,702	72%	0%	72%
7	San Diego	267,760	6,880	274,640	296,902	6,900	303,802	111%	100%	110%
8	**Total**	**286,704**	**6,880**	**293,584**	**310,604**	**6,900**	**317,504**	**108%**	**100%**	**108%**
9										
10										
11	[1] Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.									
12										

	A	B	C	D	E	F	G	H
1	**SDG&E PY 2021 CARE Annual Report**							
2	**CARE Table 6**							
3	**CARE Recertification Results**							
4	**2021**	**Total CARE Households**	**Households Requested to Recertify [1,6]**	**% of Households Total (C/B)**	**Households Recertified [2, 5,7]**	**Households De-enrolled [3, 5]**	**Recertification Rate % [4] (E/C)**	**% of Total Households De-enrolled (F/B)**
5	January	341,143	4	0.0%	0	0	0%	0.00%
6	February	343,831	7	0.0%	0	0	0%	0.00%
7	March	343,347	172	0.1%	0	0	0%	0.00%
8	April	337,887	0	0.0%	0	0	0%	0.00%
9	May	339,511	0	0.0%	0	0	0%	0.00%
10	June	340,490	0	0.0%	0	0	0%	0.00%
11	July	340,385	5,157	1.5%	1,536	3,245	30%	0.95%
12	August	340,507	5,115	1.5%	1,399	3,366	27%	0.99%
13	September	338,079	15,926	4.7%	3,901	11,064	24%	3.27%
14	October	330,969	5,986	1.8%	1,800	3,851	30%	1.16%
15	November	328,052	5,185	1.6%	1,854	3,046	36%	0.93%
16	December	317,504	7,565	2.4%	2,897	2,750	38%	0.87%
17	**YTD**	**317,504**	**45,117**	**14.21%**	**13,387**	**27,322**	**30%**	**8.61%**
18								
19								

20 [1] Excludes count of customers recertified through the probability model.

21 [2] Recertification results are tied to the month initiated and the recertification process allows customers 90 days (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.

22 [3] Includes customers who did not respond or who requested to be de-enrolled.

23 [4] Percentage of customers recertified compared to the total participants requested to recertify in that month.

24 [5] There were 3,654 accounts that were excluded from Households Recertified or De-Enrolled process due to any one of the following reasons: account was selected for high usage, account was selected for PEV (show proof of eligibility), or account closed.

25 [6] From March 4, 2020 - June 30, 2021, customers were not required to recertify due to customer protections established in Resolution M-4842 and M-4849. Accordingly, SDG&E has not removed any customers from the CARE program resulting from recertification/failure to recertify. Customers can manually request to recertify but are automatically placed in the COVID protection category.

26 [7] Due to the recertification backlog as described in the Annual Report narrative, recertification totals reflected may not include those pending to be processed.

	A	B	C	D	E	F	G	H	I
1	**SDG&E PY 2021 CARE Annual Report**								
2	**CARE Table 7**								
3	**CARE Capitation Contractors**								
4	**Contractor Name [1]**	**Contractor Type (Check one or more if applicable)**				**Enrollments**			**Total Expenditures**
5		**Private**	**CBO**	**WMDVBE**	**LIHEAP**	**Rural**	**Urban**	**Total**	
6	211 SAN DIEGO [2]		X			-	-	1,427	$ 28,540
7	ALPHA MINI MART	X				-	7	7	$ 140
8	AMERICAN RED CROSS WIC OFFICES		X	X		-	2	2	$ 40
9	CHULA VISTA COMMUNITY COLLABORATIVE		X			-	4	4	$ 90
10	COMMUNITY HOUSING WORKS		X			-	-	-	$ -
11	COMMUNITY RESOURCE CENTER		X			-	2	2	$ 40
12	HEARTS AND HANDS WORKING TOGETHER		X			-	1	1	$ 30
13	HOME START		X			-	-	-	$ -
14	HORN OF AFRICA		X			-	-	-	$ -
15	INTERFAITH COMMUNITY SERVICES		X			-	1	1	$ 20
16	LA MAESTRA COMMUNITY HEALTH CENTERS		X			-	3	3	$ 80
17	MAAC PROJECT		X		X		7	7	$ 140
18	NEIGHBORHOOD HEALTH CARE		X			-	2	2	$ 50
19	NORTH COUNTY HEALTH SERVICES	X				-	3	3	$ 70
20	SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			1	10	11	$ 220
21	SAN YSIDRO HEALTH CENTERS		X			-	6	6	$ 170
22	SCRIPPS HEALTH WIC		X			-	-	-	$ -
23	VISTA COMMUNITY CLINIC		X			-	-	-	$ -
24	**Total Enrollments and Expenditures**					**1**	**48**	**1,476**	**$ 29,630**
25									
26									
27	[1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.								
28	[2] Unable to allocate enrollments separately for rural or urban and have provided in total only.								

	A	B	C	D	E	F	G	H
1	**SDG&E PY 2021 CARE Annual Report**							
2	**CARE Table 8**							
3	**CARE Participants as of Month-End**							
4	**2021**	**Gas and Electric**	**Gas Only**	**Electric Only**	**Total**	**Eligible Households**	**Enrollment Rate**	**% Change**
5	**January**	215,708	0	125,435	341,143	293,584	116%	1.53%
6	**February**	217,462	0	126,369	343,831	293,584	117%	0.79%
7	**March**	217,363	0	125,984	343,347	293,584	117%	-0.14%
8	**April**	197,138	0	140,749	337,887	293,584	115%	-1.59%
9	**May**	198,202	0	141,309	339,511	293,584	116%	0.48%
10	**June**	198,866	0	141,624	340,490	293,584	116%	0.29%
11	**July**	199,133	0	141,252	340,385	293,584	116%	-0.03%
12	**August**	199,309	0	141,198	340,507	293,584	116%	0.04%
13	**September**	198,227	0	139,852	338,079	293,584	115%	-0.71%
14	**October**	193,777	0	137,192	330,969	293,584	113%	-2.10%
15	**November**	191,807	0	136,245	328,052	293,584	112%	-0.88%
16	**December**	185,316	0	132,188	317,504	293,584	108%	-3.22%
17								
18								

	A	B	C	D	E
1	**SDG&E PY 2021 CARE Annual Report**				
2	**CARE Table 9**				
3	**CARE Average Monthly Usage & Bill**				
4	**Average Monthly Gas / Electric Usage**				
5	**Residential Non-CARE vs. CARE Customers**				
6	**Customer**	**Gas Therms**	**Gas Therms**	**Total**	
7		**Tier 1**	**Tier 2**		
8	Non-CARE	19.4	6.6	26.0	
9	CARE	17.4	2.8	20.2	
10	**Customer**	**Electric KWh**	**Electric KWh**	**Total**	
11		**Tier 1**	**Tier 2**		
12	Non-CARE	284	114	398	
13	CARE	289	77	366	
14					
15					
16	**Average Monthly Gas / Electric Bill[2]**				
17	**Residential Non-CARE vs. CARE Customers[1]**				
18	**(Dollars per Customer)**				
19	**Customer**	**Gas**	**Electric**		
20	Non-CARE	$50.65	$131.51		
21	CARE	$29.78	$76.06		
22					
23					
24	[1] Excludes master-meter usage.				
25	2 Average Monthly Gas/Electric Bill reflects residential Non-CARE (CARE) 2021 total billed.				
26					

	A	B	C	D	E	F
1	**SDG&E PY 2021 CARE Annual Report**					
2	**CARE Table 10**					
3	**CARE Surcharge & Revenue**					
4	**Electric**					
5	**CARE Surcharge and Revenue Collected by Customer Class**					
6						
7	Customer	Average Monthly[3]		CARE Surcharge	Total CARE Surcharge Revenue	Percentage of CARE Surcharge
8	Class	CARE Surcharge[1]	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
9	Residential	$ 2.73	$ 122	2%	$ 46,388,747	37%
10	Commercial	$ 9.38	$ 361	3%	$ 16,039,605	13%
11	Agricultural	$ 46.06	$ 1,131	4%	$ 1,931,673	2%
12	Large/Indust	$ 330.18	$ 7,277	5%	$ 62,258,275	49%
13						
14						
15	**GAS**					
16	**CARE Surcharge and Revenue Collected by Customer Class**					
17						
18	Customer	Average Monthly		CARE Surcharge	Total CARE Surcharge Revenue	Percentage of CARE Surcharge
19	Class	CARE Surcharge[2]	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
20	Residential	$ 1.56	$ 57	3%	$ 12,026,889	55%
21	Commercial	$ 16.19	$ 452	4%	$ 5,393,968	25%
22	Natural Gas Vehicle	$ 2,165.32	$ 28,840	8%	$ 607,266	3%
23	Industrial	$ 6,394.39	$ 19,129	33%	$ 3,717,407	17%
24						
25	[1] Excludes CARE customers. Pursuant to D. 15-07-001, OP 4 and Section 11.1.1 authorizes adjustments to CARE to transition to the legislatively-mandated CARE discount range in compliance with Section 739.1 were authorized. Effective 9/1/15 per AL 2783-E, CARE customers receive non-CARE rates; therefore, there is no longer a CARE Rate subsidy.					
26	[2] Excludes CARE customers.					
27	[3] As of 2021, SDG&E has revised its methodology to calculate the electric averages to align with Public Purpose Program reporting.					

	A	B	C	D	E	F
1	**SDG&E PY 2021 CARE Annual Report**					
2	**CARE Table 11**					
3	**CARE Capitation Applications[1]**					
4	**Entity**	**Total Received**	**Approved[2]**	**Denied**	**Pending/ Never Completed**	**Duplicate**
5	211 SAN DIEGO	1,830	1,355	64	41	370
6	ALPHA MINI MART	9	4	0	0	5
7	AMERICAN RED CROSS	6	2	0	3	1
8	CHULA VISTA COMMUNITY COLLABORATIVE	3	3	0	0	0
9	COMMUNITY HOUSING WORKS	0	0	0	0	0
10	COMMUNITY RESOURCE CENTER	3	2	1	0	0
11	HEARTS AND HANDS TOGETHER	0	0	0	0	0
12	HOME START	0	0	0	0	0
13	HORN OF AFRICA	0	0	0	0	0
14	INTERFAITH COMMUNITY SERVICES	1	1	0	0	0
15	LA MAESTRA FAMILY CLINIC	17	7	0	8	2
16	MAAC PROJECT - CARE	31	8	4	0	19
17	NEIGHBORHOOD HEALTH CARE	2	2	0	0	0
18	NORTH COUNTY HEALTH SERVICES	7	3	1	1	2
19	SAN DIEGO STATE UNIVERSITY WIC	13	12	0	0	1
20	SAN YSIDRO HEALTH CENTERS	19	5	1	9	4
21	SCRIPPS HEALTH WIC (SHW)	2	0	0	0	2
22	VISTA COMMUNITY CLINIC	1	0	0	1	0
23	**Total**	**1,944**	**1,404**	**71**	**63**	**406**
24						
25	[1] Includes sub-metered customers.					
26	[2] Includes new enrollments and recertification applications approved.					
27						
28						

	A	B	C	D	E	F	G
1	**SDG&E PY 2021 CARE Annual Report**						
2	**CARE Table 12**						
3	**CARE Expansion Program**						
4	**Participating Facilities by Month**						
5	**2021**	**Gas**			**Electric**		
6		**CARE Residential Facilities**	**CARE Commercial Facilities**	**Total Gas**	**CARE Residential Facilities**	**CARE Commercial Facilities**	**Total Electric**
7	**January**	227	115	342	514	185	699
8	**February**	227	116	343	502	185	687
9	**March**	189	100	289	443	165	608
10	**April**	232	112	344	511	191	702
11	**May**	232	109	341	510	190	700
12	**June**	231	109	340	510	189	699
13	**July**	228	109	337	499	193	692
14	**August**	227	109	336	500	186	686
15	**September**	227	111	338	496	187	683
16	**October**	225	111	336	494	187	681
17	**November**	225	111	336	493	187	680
18	**December**	225	111	336	498	187	685
19							
20							
21	**Average Monthly Gas / Electric Usage[1]**						
22	**Customer**	**Gas**	**Electric**				
23		**Therms**	**KWh**				
24	Residential Facilities	47	475				
25	Commercial Facilities	424	9,629				
26							
27							
28	**CARE Expansion Self-Certification and Self-Recertification Applications**						
29		**Received**	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**	
30	Total	5	5	0	0	0	
31	Percentage		100%	0%	0%	0%	
32							
33							
34	[1] Excludes master meter usage.						
35							

	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2021 CARE Annual Report**									
2	**CARE Table 13**									
3	**CARE High Usage Verification Results[5]**									
4	**Stage 1 - IRS Documentation and ESA Agreement**				**Stage 2 - ESA Participation**			**Stage 3 - Usage Monitoring**		
5	**Households Requested to Verify**	**Removed (No Response)**	**Removed (Verified Ineligible)[1]**	**Income Verified and Referred to ESA**	**Failed and Removed[2]**	**Ineligible[3]**	**Completed**	**Removed[4]**	**Appeals Denied**	**Appeals Approved**
6	14,990	12,415	106	2,556	8	2,375	181	4	0	0
7										
8	[1] Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.									
9	[2] Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms.									
10	3 Includes customers who previously participated in ESA Program, landlord refused, etc. These customers move directly to Stage 3.									
11	[4] Customers removed for exceeding 600% of baseline in any monthly billing cycle.									
12	[5] High usage is defined as a CARE customer that exceeds 400% or 600% of baseline.									
13										
14										

	A	B	C	D	E	F	G	H	I
1	**SDG&E PY 2021 CARE Annual Report**								
2	**CARE Table 13A**								
3	**CARE Customer Usage and ESA Program Treatment**								
4	# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV [1]	Percent of those CARE customers Not served by ESA Program [3]	# of Enrollments led to ESA Program measure Installations [4]	# of Long-Term tenancy CARE customers who have Not applied for ESA Program [2]	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment [10]				Energy Usage of CARE customers who do Not accept ESA Program treatment [9]
5					Energy Usage before ESA Program treatment[8, 5]	Energy Usage within 3-months of ESA Program treatment [6]	Energy Usage within 6-months of ESA Program treatment [7]	Energy Usage within 12-months of ESA Program treatment [8]	
6	8,177	50%	0	4,077	N/A	N/A	N/A	N/A	717 kWh
7									
8									
9									
10	[1] In 2021, there were 8,177 CARE accounts identified as customers who have been on CARE rate at the same meter for a least six years and have 90th Percentile of high usage.								
11	[2] CARE customers who did not participated in the ESA Program during 2021.								
12	[3] Percentage of CARE customers not served by ESA: *2/*1(4077/8177= 50%)								
13	[4] Among the 4,077 accounts, 0 accounts enrolled in ESA for program year 2021.								
14	[5] Average monthly kWh in 12 months prior to ESA enrollment. Usage starting and ending month vary on accounts depending on ESA enrollment dates.								
15	[6] Average monthly kWh 3 months after ESA enrollment. N/A								
16	7 Average monthly kWh 6 months after ESA enrollment. N/A								
17	8 Average monthly kWh 12 months after ESA enrollment. N/A								
18	[9] Among the 4,077 accounts, this represents the average monthly kWh.								
19	[10] Not applicable for columns E-H as no customer enrollments led to ESA program measure installations as indicated in column C.								

	A	B	C
1	**SDG&E PY 2021 CARE Annual Report**		
2	**CARE Table 14**		
3	**Categorical Enrollment**		
4	**Type of Enrollment**	**Number of Customer Enrollments[1]**	
5	Bureau of Indian Affairs General Assistance	95	
6	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	20,824	
7	CalWORKs/Temporary Assistance for Needy Families (TANF) [2]	1,891	
8	Head Start Income Eligible - (Tribal Only)	201	
9	Healthy Families A&B	5,933	
10	Low-income Home Energy Assistance Program (LIHEAP)	1,692	
11	Medicaid/Medi-Cal	30,696	
12	National School Lunch Program (NSLP) - Free Lunch	9,322	
13	Supplemental Security Income (SSI)	6,572	
14	Tribal TANF [2]	n/a	
15	Women, Infants, and Children Program (WIC)	6,238	
16			
17			
18			
19	[1] Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.		
20	[2] CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.		
21			