

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

Order Instituting Rulemaking for Oversight of  
Energy Efficiency Portfolios, Policies, Programs,  
and Evaluation.

R.25-04-010

**SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ENERGY EFFICIENCY  
PROGRAMS ANNUAL REPORT 2024 RESULTS**

Siobhán E. Murillo  
Attorney for:  
**SAN DIEGO GAS & ELECTRIC COMPANY**  
8330 Century Park Court, CP32D  
San Diego, CA 92123-1530  
Telephone: (619) 616-0624  
Email: smurill1@sdge.com

June 30, 2025

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

Order Instituting Rulemaking for Oversight of  
Energy Efficiency Portfolios, Policies, Programs,  
and Evaluation.

R.25-04-010

**SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ENERGY EFFICIENCY  
PROGRAMS ANNUAL REPORT 2024 RESULTS**

Pursuant to the Administrative Law Judge’s (ALJ) Ruling Adopting Annual Reporting Requirements for Energy Efficiency (EE) and Addressing Related Reporting Issues, dated August 8, 2007, and California Public Utilities Commission (Commission) Decisions (D.) 18-01-004 and D.18-05-041, San Diego Gas & Electric Company (SDG&E) hereby submits its Annual Report for 2024 EE programs and accomplishments. Pursuant to Rule 11.6, on February 18, 2025, SDG&E submitted an extension request to allow for adequate time to resolve system-related challenges and to compile and share statewide data with the investor-owned utilities. Subsequently, on March 10, 2025, ALJ Kao granted the extension as follows:

- SDG&E shall upload its statewide data into the California Energy Data and Reporting System (CEDARS) no later than April 15, 2025.
- SDG&E may have until June 30, 2025, to file its Annual Energy Efficiency Report.

As such, SDG&E’s Annual Report is timely filed/served. SDG&E’s Annual Report provides detailed portfolio, sector, and program-level information on the accomplishments of SDG&E’s EE Portfolio in 2024, including data on energy savings, budget, cost-effectiveness, and metrics. Pursuant to Ordering Paragraph (OP) 9 of D.18-05-041, this Annual Report also includes Performance Metrics and 2024 performance results.

Additionally, and pursuant to OP 8 of D.18-01-004, the dollar amounts of third-party contracts are included in Appendix A, Table 11, and associated documents uploaded and available for viewing on the CEDARS website. The Report and the updated set of final metrics are available on <https://www.sdge.com/rates-and-regulations/regulatory-filing/914/energy-efficiency-filings>.

Lastly, SDG&E notes that this Annual Report includes the following Appendices:

- Appendix A – Annual Report Tables.
- Appendix B - Final True Up Reports.
- Appendix C - Revisions to SDG&E's 2023 Annual Report.

Respectfully submitted,

/s/ Siobhán E. Murillo

Siobhán E. Murillo

Attorney for:

SAN DIEGO GAS & ELECTRIC COMPANY

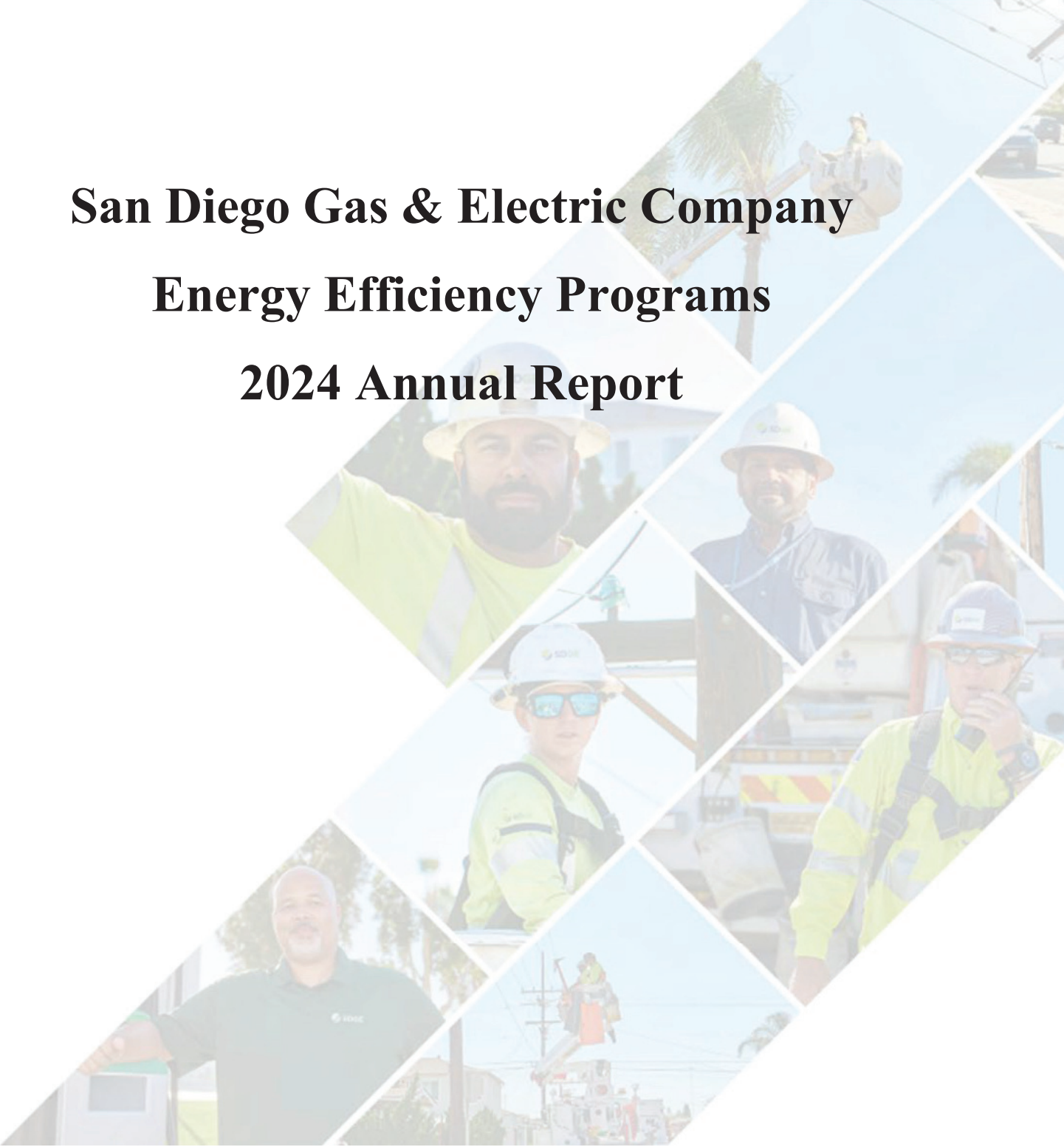
8330 Century Park Court, CP32D

San Diego, CA 92123-1530

Telephone: (619) 616-0624

Email: [smurill1@sdge.com](mailto:smurill1@sdge.com)

June 30, 2025



# **San Diego Gas & Electric Company**

## **Energy Efficiency Programs**

### **2024 Annual Report**

## Table of Contents

I.	EXECUTIVE SUMMARY .....	1
	Statewide Programs.....	2
	SDG&E-Administered Statewide Programs .....	3
	1.    SDGE SW HVAC Up – SW Upstream HVAC Commercial & Residential Program .....	3
	2.    SDGE SW PLA – Plug Load and Appliances (PLA) .....	4
	3.    SDGE SW HVAC QIQM – SW HVAC QI/QM Program.....	6
II.	RESOURCE ACQUISITION SEGMENT PROGRAMS .....	7
	Commercial Sector Programs.....	7
	1.    SDGE3226 – Com Direct Install – Business Energy Solutions (BES).....	7
	2.    SDGE4004 – Commercial Large Customer Services .....	8
	3.    SDGE4198 - Core Market Access Program – Commercial .....	9
	Residential Sector Programs .....	10
	1.    SDGE4001 – Single Family Program .....	10
	2.    SDGE4002 – Multi Family Program .....	11
	3.    SDGE4040 – IDSM Local Residential Behavioral Program .....	12
	4.    SDGE4197 – Core Market Access Program - Residential.....	13
	Agricultural Sector Programs .....	14
	1.    SDGE4009 - Agricultural Growers Services Program – AgEASY.....	14
	Industrial Sector Programs .....	15
	1.    SDGE4006 – Industrial Sector Program .....	15
	Public Sector Programs .....	15
	1.    SDGE4010 – Local Government Customer Program .....	15
	2.    SDGE4012 – Federal Customer Services Program.....	16
III.	MARKET SUPPORT SEGMENT PROGRAMS.....	17
	1.    SDGE3262 – SW – FIN – On-Bill Finance .....	17
	2.    SDGE3280 – 3P – IDEEA365 .....	18
	3.    SDGE4174 – Workforce, Education & Training Programs.....	19

4.	SDGE4175 – Local Residential Fuel-Substitution .....	20
5.	SDGE4184 – Non-Residential Behavioral Program.....	21
IV.	EQUITY SEGMENT PROGRAMS .....	21
1.	SDGE4173 – Small Business Outreach .....	21
2.	SDGE4176 – Residential Equity Program.....	22
V.	CODES & STANDARDS PROGRAMS.....	23
1.	SDGE3251 – SW C&S – Compliance Enhancement .....	23
2.	SDGE3252 – SW C&S – Reach Codes .....	24
3.	SDGE3253 – SW C&S – Planning Coordination.....	25
VI.	OTHER PROGRAMS & ACTIVITIES .....	26
	Market Transformation .....	26
	Coordination with San Diego Regional Energy Network.....	26
	Third Party Contract Upstream/Midstream Installation Verification .....	27
	Appendix A: SDG&E Portfolio Supporting Data.....	1
	Appendix B: Final True Up Reports .....	1
	Section 1 – HVAC.....	1
	Section 2 – PLA .....	2
	Section 3 – HVAC QI/QM.....	2
	Section 4 – 2024 Payment Schedule .....	3

## I. EXECUTIVE SUMMARY

In 2024, San Diego Gas & Electric Company (SDG&E) worked diligently to meet goals, comply with regulatory requirements, and deliver a comprehensive Energy Efficiency (EE) portfolio to its customers. Despite these efforts, the portfolio continued to face significant challenges in achieving cost-effective outcomes. A key indicator of this is the 2024 resource acquisition portfolio's total resource cost (TRC) ratio below 1.0, which shows that the portfolio's benefits did not outweigh its costs.

Several interrelated factors contributed to this outcome. First, SDG&E's service territory offers limited potential for new, above-code energy efficiency opportunities, and contains minimal industrial load, reducing the scale and diversity of achievable savings. Second, the success of past EE efforts has led to market saturation of low-cost, high-impact measures. As a result, the portfolio now relies more heavily on complex, expensive measures that offer diminishing returns in terms of cost-effectiveness. Third, evolving codes and standards have raised the baseline for efficiency, further narrowing the scope for incremental savings. Finally, rising implementation costs, customer participation barriers, and the administrative complexity of delivering increasingly customized solutions have compounded these challenges, making it more difficult to maintain a cost-effective EE portfolio.

As part of California's broader decarbonization objectives set forth in Senate Bill (SB) 100 – requiring 100% zero-carbon electricity by 2045 – SDG&E supports the state's climate vision but faces growing challenges in administering regional energy efficiency programs cost-effectively. Most of SDG&E's customers are served by a Community Choice Aggregator (CCA), and SDG&E's largest CCA will be providing EE programs and services to almost all of SDG&E's service territory through the San Diego Regional Energy Network (SDREN), in partnership with the County of San Diego.<sup>1</sup> SDREN will administer EE programs in the public, residential, commercial, and cross-cutting sectors. SDG&E acknowledges the importance of achieving savings goals with a cost-effective portfolio and submitted a plan to enhance affordability and align with

---

<sup>1</sup> SDREN, Energy Efficiency Portfolio Application, Exhibit 1 - 2024-2031 Strategic Business Plan (January 5, 2024), Figure 9 at 21, *available at* [https://sdcommunitypower.org/wpcontent/uploads/2024/01/Exhibit-1\\_SDRENs-2024-2031-Strategic-Business-Plan.pdf](https://sdcommunitypower.org/wpcontent/uploads/2024/01/Exhibit-1_SDRENs-2024-2031-Strategic-Business-Plan.pdf).

the state targets. As requested in SDG&E's Strategic Business Plan, the path forward aims to reduce ratepayers' burden, increase efficiency, and eliminate redundant or underperforming programs by discontinuing administration of most regional EE programs.<sup>2</sup>

### **Statewide Programs**

Decision (D.)18-05-041 assigned lead Program Administrators (PAs) to specific statewide programs and downstream pilot programs and vested each lead PA with full authority, including assignment of personnel to manage the program on behalf of the California Public Utilities Commission (Commission or CPUC).<sup>3</sup> The Commission identified the various areas of sole responsibility for the lead PA.<sup>4</sup> Among these responsibilities is the "[p]rocurement, contract administration, and co-funding management from partner program administrators" of the SW program.<sup>5</sup> In addition to these responsibilities, lead PAs collaborate with non-lead PAs to keep them informed on program progress, delivery, and budgets. SDG&E provides funding to the lead PA and SDG&E receives credit for the proportional benefits from statewide programs through the CPUC's California Energy Data Reporting System (CEDARS).<sup>6</sup> Please refer to the lead PA's respective 2024 Annual Reports for information on statewide programs for which they are responsible.

### **List of Statewide Programs and Lead PAs:**

- Heating Ventilation & Air Conditioning (HVAC) Quality Installation/Quality Maintenance (QI/QM) (SDG&E)
- Plug Load & Appliance (SDG&E) 7

---

<sup>2</sup> See generally Application (A.) 25-04-014, Application of San Diego Gas & Electric Company to Revise Its 2024-2031 Energy Efficiency Rolling Portfolio Business Plan (April 25, 2025).

<sup>3</sup> D.18-05-041 at 79 – 80 and 90 – 92.

<sup>4</sup> *Id.* at Ordering Paragraph (OP) 18.

<sup>5</sup> *Id.* at OP 18(b).

<sup>6</sup> Please be advised that the annual true-up reports may be revised at a future date in order to true up the gas and electric expenditures for fuel substitution projects. See OP 5 of D.19-08-009, which stipulates that fuel substitution measures and their associated program costs shall be borne by the ratepayers of the new fuel, rather than by the ratepayers of the fuel being replaced.

<sup>7</sup> See Advice Letter (AL) 4494-E/3332-G, approved November 6, 2024 and effective September 18, 2024, available at

<https://tariffsprd.sdge.com/view/filing/?utilId=SDGE&bookId=ELEC&flngKey=7273&flngId=4494-E&flngStatusCd=Approved>.



- HVAC (Upstream Residential and Commercial) (SDG&E)<sup>8</sup>
- Residential New Construction (Pacific Gas and Electric Company (PG&E))
- Non-Residential New Construction (PG&E)
- Codes & Standards (Building Codes Advocacy) (PG&E)
- Codes & Standards (Appliance Standards Advocacy) (PG&E)
- Codes & Standards (National Advocacy) (PG&E)
- Emerging Technology (Gas) (Southern California Gas Company (SoCalGas))
- Emerging Technology (Electric) (Southern California Edison Company (SCE))
- Workforce Education & Training (PG&E)
- Higher Education (SCE)
- State of California (PG&E)
- Foodservice Point of Sale (SoCalGas)
- Midstream Water Heating (SoCalGas)
- Water/Wastewater Pumping Program (SCE)
- Workforce Education & Training (Career and Workforce Readiness) (PG&E)
- Home Energy Score (BayREN)

## **SDG&E-Administered Statewide Programs**

### **SDGE SW HVAC Up – SW Upstream HVAC Commercial & Residential Program**

**Program Segment:** Resource Acquisition

**Program Implementer:** CLEAResult Consulting, Inc.

**Program Overview:** SDG&E is the lead PA for the Statewide Upstream HVAC program, an upstream/midstream program that offers HVAC measures, including high-efficiency commercial unitary and packaged air conditioners, commercial heat pumps, commercial chillers, commercial space heating boilers, residential heat pumps, residential gas furnaces, and residential gravity wall furnaces. The program aims to influence the market through changes in stocking and selling practices at the retailer, distributor, and manufacturer levels, thus influencing the end-users and installation contractors. By promoting high-efficiency equipment, the program is designed to

---

<sup>8</sup> *Id.*

encourage manufacturers to develop California-specific equipment and guidelines to influence change in California. The program captures savings through the movement of incentivized deemed measures. Pursuant to AL 4494-E/3332-G, in 2026, SDG&E expects to transition the statewide HVAC program to PG&E.<sup>9</sup>

### **Program Strategies and Outcomes:**

Across both program segments, 39 distributors participated, supporting over 1,200 installation verifications and hosting more than 20 partner events and free contractor training sessions statewide. In response to partner feedback, the programs enhanced data preparation support, improving the quality of customer data submissions. During the program year, the Commercial segment recorded over 4,100 attributed sales, with the top-performing measure—Pkg Air-Cooled Air Conditioner < 65 kBtu (SWHC014)—accounting for 75% of those sales. The Residential segment achieved over 6,100 attributed sales, led by the Pkg/Split System Heat Pump FuelSub (SWHC045), which represented 80% of residential sales. Additional accomplishments included a 98% partner participation rate, high satisfaction scores, and improved processes that boosted trade ally engagement. However, there were certain challenges related to new construction installation restrictions, due to workpaper updates effective January 1, 2024, where new construction installations were no longer permitted for 35 program measures, including some of the program’s more prominent performers. Specifically, SWHC013, SWHC014 - Commercial Pkg Air-Cooled Air Conditioners (all sizes) and SWHC004 - Commercial Hot Water Boilers (all tiers). This considerably impacted the number of qualifying sales that were eligible for rebates from some of our most active distributors. Notwithstanding those challenges, the program successfully met its TSB goal.

### **SDGE SW PLA – Plug Load and Appliances (PLA)**

**Program Segment:** Resource Acquisition

**Program Implementer:** CLEAResult Consulting, Inc.

**Program Overview:** The Statewide PLA program is a midstream program that offers EE measures to residential customers across the investor-owned utility (IOU) service territories. The statewide PLA program, marketed as Golden State Rebates, provides support for customer/supply chain

---

<sup>9</sup> *Id.*

participation and energy savings through trade professional and retail partnerships. Ongoing data collection strategies attempt to target reliable and cost-effective offerings for residential customers throughout the state. Pursuant to AL 4494-E/3332-G, in 2026, SDG&E expects to transition the statewide PLA program to SCE.<sup>10</sup>

### **Program Strategies and Outcomes:**

The Statewide PLA program offers two pathways through the midstream model: a distributor pathway and a retailer pathway. Both focus on assisting partners in developing a procurement strategy that enables them to meet customer demand for high-efficiency units. As part of the program's 2024 strategy for driving participation, the program continued to foster key partnerships with manufacturers, Energy Star, the statewide Technology and Equipment for Clean Housing (TECH) program, and IOUs to spread awareness of the program. The ongoing partnerships with manufacturers and Energy Star led to continued promotion of the program's available rebates. The statewide TECH program partnership promoted the program in their monthly newsletters to contractors and at industry events attended by contractors and distributors. Additionally, the partnership amongst the IOUs led to collaboration resulting in increased customer validation and program design simplicity. The program also continued to promote participation in each IOUs' demand response programs via the retail rebate portal's automated communications. Marketing materials were refined for the program, including the program's website and materials designed for contractor outreach through the distributor pathway. Paid media, email, and search advertising continued in 2024, and the program was featured during the 2024 Earth Day and Black Friday sales events.

The program reached its initial TSB goal mid-year and received additional IOU funding to allow the program to continue through 2024 without interruption. The program has a limited variety of available measures, but the fuel substitution heat pump water heater measures continued to see notable growth in the market and delivered significant TSB for the program. However, the fuel substitution measures lower the program's TRC despite the high TSB value. By year-end, the distributor pathway enrolled 54 participating distributors. Additionally, the program made updates to its online portal that enable product validation, customer eligibility, and reporting.

---

<sup>10</sup> *Id.*

The retailer pathway retained five retailers with about 380 brick and mortar locations across California. This retailer pathway has an online instant rebate portal for end-use customers to receive rebate coupon(s) that are redeemed at participating retailer locations. The online rebate portal allows for customer validation, product validation, and reporting. Pursuant to AL 4494-E/3332-G, in 2026, SDG&E expects to transition the statewide PLA program to SCE.

### **SDGE SW HVAC QIQM – SW HVAC QI/QM Program**

**Program Segment:** Market Support

**Program Implementer:** Frontier Energy, Inc.

**Program Overview:** The Statewide Residential HVAC Quality Installation and Quality Maintenance (QI/QM) Program aims to transform the HVAC installation and maintenance market by assisting and providing incentives to contractors who promote and install higher-value services by exemplifying best practices. This market support program offers participants no-cost training, tools, and multi-tiered incentives to complete quality maintenance setups, quality maintenance calls, quality bids, and quality installations. An Industry Advisory Panel, made up of HVAC industry subject matter experts, guides the standards for services, verification requirements, and outreach and training, particularly for contractors who serve Disadvantaged Communities and hard-to-reach customers.

#### **Program Strategies and Outcomes:**

The key strategy of the QI/QM program is an Industry Advisory Panel consisting of eighteen organizations determines standards for services, verification requirements, outreach and training. In total, nine Advisory Panel meetings were hosted in 2024, ensuring internal processes, resource development, and marketing messaging were refined and simplified for the target audience. Multi-tiered, incentivized services encourage participating contractors to “level up” by exemplifying best practices and expertise. By allowing contractors to leverage other energy efficiency, demand response, and financing programs, they can maximize the program benefits.

Contractor outreach, recruitment efforts and quality installation, and maintenance trainings were offered in 2024. A Learning Management System (LMS) emphasizing themes like “Building Confidence,” “Advancing the Industry,” and “Differentiating the Best” continued to attract a variety of enrollees, from entry-level to experienced companies. Initial outreach was targeted at HVAC contractors located in disadvantaged communities, Diverse Business Enterprise (DBE)

certified, or small businesses. Existing contractor networks participating in regional and statewide EE programs were also leveraged to promote recruitment efforts.

In the second quarter, the implementer experienced an uptake with on-demand training from 99 unique technicians taking trainings in Q1, compared to 219 unique technicians that took training in Q2, and the enrollment of six new HVAC contractors. By the third quarter, 16 trade professionals were actively participating in the program. Additionally, throughout 2024, approximately 31% of all services incentivized were performed by disadvantaged workers. The program collects relevant disadvantaged worker criteria from each contractor upon enrollment, for reporting purposes. Outreach activities and recruitment also continued throughout 2024 including booth presence at the Institute of Heating & Air Conditioning Industries (IHACI) annual trade show, email campaigns, and distribution of program flyers. Process improvements were initiated to ensure best practices were identified and implemented. In 2024, the implementer enrolled 33 active HVAC contractors, held 220 training courses and provided 1,100 incentive projects in total.

The Program Year was not without its challenges, most of which centered around data integrity and recruitment in specific regions. Quality Assurance protocols identified discrepancies across multiple databases, which impacted the accuracy of project reporting. In response, the implementer transitioned the incentive payment process and site QA verification in-house, previously managed by a subcontractor, to improve oversight and consistency. Additionally, early in 2024, submission errors by participants caused delays in the review and approval process. To mitigate this, the implementer was advised to revise training sessions for new participants to ensure accurate completion of program applications and documentation. Recruitment also posed difficulties, particularly in areas outside major metropolitan centers such as the Central Valley. To address this, the implementer launched a targeted marketing campaign aimed at increasing contractor engagement in that region. SDG&E intends to request approval to change the lead of its remaining statewide QI/QM program via Tier 2 Advice Letter at a future date.

## **II. RESOURCE ACQUISITION SEGMENT PROGRAMS**

### **Commercial Sector Programs**

#### **1. SDGE3226 – Com Direct Install – Business Energy Solutions (BES)**

**Program Segment:** Resource Acquisition

**Program Implementer:** Eagle Systems International, Inc.

**Program Overview:** The Business Energy Solutions program delivered no-cost or discounted EE equipment upgrades by an installation contractor to reduce peak demand and energy consumption for K-12 schools. The program is designed to increase the adoption of energy efficient measures by offering an EE audit as well as EE equipment and installation at no cost or at a discounted price. While the legacy program was originally designed for eligible business customers, it was made available to K-12 schools in 2024 due to the early closure of the K-12 Schools Energy Efficiency Program (KEEP).

**Program Strategies and Outcomes:**

SDG&E extended its BES program into 2024 in a limited capacity for public K-12 schools to fill a gap in the market and avoid a lapse in program services. BES enables qualified schools to take advantage of no-cost EE measure installation. BES installed measures including a mix of tank and pipe insulation and heat pump water heaters. Outreach efforts included (1) leveraging account executive contacts for key stakeholder engagement; (2) revising marketing and program collateral to reflect 2024 program offering(s) for eligible customers; and (3) focusing on electrification via fuel-substitution heat-pump water heaters. Although these activities were important to the overall portfolio, the program did not meet its energy savings goals.

**SDGE4004 – Commercial Large Customer Services**

**Program Segment:** Resource Acquisition

**Program Implementer:** TRC Solutions, Inc.

**Program Overview:** The Comprehensive Energy Management Solutions (CEMS) program provides implementation services, including marketing, outreach, engineering, operations, customer service, and data management and reporting to large commercial customers. CEMS is available to gas and electric customers on qualifying rates schedules with a monthly demand greater than 20 kW. The program leverages the implementer's outreach staff, team of subcontractors, and network of trade professionals to provide customers with a single offering that addresses EE needs. Energy savings are primarily delivered through three targeted offerings:

- Deemed - Offers incentives for the installation of select EE equipment based on workpapers approved by the CPUC.
- Custom - Offers incentives to customers for equipment installations not included within approved workpapers. These may also include process or procedural

changes in operations. Custom projects require engineering calculations to project savings, followed by measurement and verification of those savings.

- Normalized Metered Energy Consumption (NMEC) - Similar to custom projects, savings are verified over a 12-month period using data from the customer's utility meters.

### **Program Strategies and Outcomes:**

In 2024, the CEMS program met its contractual goals for TSB and electrification savings. By leveraging a network of trade professionals across the grocery, food service, and hospitality industries, the program facilitated cost-effective, EE equipment installations throughout the service territory. In 2024, only seven custom projects were completed due to the challenges with custom review process and protocols. Customers continue to gravitate to simpler deemed measures, which contributed a large portion of the program's total savings.

Key strategies in 2024 included expanding adoption of software-controlled switch reluctance motors by partnering with two trade professionals leading to the completion of 23 projects in 2024. Additionally, the implementer-maintained relationships with specialized trade professionals allowing the implementer to scale up hot water pipe and tank insulation projects, yielding 210 projects. Finally, the implementer advanced fuel substitution through heat pump water heater installations at locations including hospitals, grocery stores, nursing homes, and hotels, supporting the installation of over 25 systems.

### **SDGE4198 - Core Market Access Program – Commercial**

**Program Segment:** Resource Acquisition

**Program Implementer:** SDG&E

**Program Overview:** D.23-06-055 required that certain PAs “make available solicitations using market access approaches for residential and commercial downstream opportunities in their territories.”<sup>11</sup> On May 8, 2024, SDG&E launched the Market Access Program solicitation. Additionally, on July 1, 2024, to ensure there was no service interruption between the closure of the Summer Reliability Market Access Program, and the launch of the third-party Market Access Program in solicitation, SDG&E launched SDGE4198 Core Market Access Program – Commercial. The interim program continued to offer aggregators the opportunity to provide

---

<sup>11</sup> D.23-06-055 at OP 26.



customers with options not available through conventional EE programs. Due to the mid-year launch date, there were only three installations in 2024.

### **Program Strategies and Outcomes:**

The program utilized aggregators to identify various EE projects for SDG&E commercial customers that deliver measurable TSB. The incentives offered are designed to be valuable during summer peak and net peak hours. Additionally, aggregators market the program's offerings and benefits and offer technical assistance. The program utilized population-level NMEC rules and methodologies to determine verified energy savings. A pay-for-performance (PFP) payment structure based on TSB provides incentives to aggregators for identifying EE projects that deliver measurable peak (4pm-9pm) demand savings, notably during summer months and between the hours of 4pm to 7pm (Peak) and 7pm to 9pm (Net Peak).

### **Residential Sector Programs**

#### **SDGE4001 – Single Family Program**

**Program Segment:** Resource Acquisition

**Program Implementer:** Eagle Systems International, Inc.

**Program Overview:** SDG&E's single-family program (RES) is a Zero Net Energy (ZNE)-focused residential resource acquisition program. The ZNE path begins with installing persistent cost-effective direct install measures that transition the customer into home energy surveys/sales consultations for higher levels of EE and renewable technologies that can potentially be financed by the participant and installed by the implementer. The RES program strategies include (1) maximizing energy savings; (2) forging the pathway to zero net energy; (3) constructing a demand response resource; and (4) developing cost-effective measure packages for ongoing program success. The RES program also presents options to integrate EE and demand response in the single-family market. These options originate from the direct installation of smart thermostats with required demand response enrollment. Over time, a demand response resource is constructed through individual enrollment and provisioning of smart thermostats. This demand response resource helps assist SDG&E during peak demand periods to maintain grid reliability.

### **Program Strategies and Outcomes:**

To maximize energy savings opportunities, the RES program participated in SDG&E technical review meetings where measure package development is advanced, and savings updates



are reviewed. These meetings provided insights and knowledge for current implementation of measures to maximize energy savings and provide a platform for development of new measures and revisions of current measures. These ongoing discussions led to the measure package development of the whole house fan and an update to the duct test and seal measure package. To promote the program and generate interest throughout 2024, the team conducted email campaigns resulting in more than a thousand customer leads. The 2024 RES program outcomes included approximately 1,000 single-family homes treated with cost-effective EE measures; and the program implemented lifecycle refrigerant management and smart fan controllers introduced. Despite these efforts, the RES program fell short of TSB and energy savings goals.

### **SDGE4002 – Multi Family Program**

**Program Segment:** Resource Acquisition

**Program Implementer:** Eagle Systems International, Inc.

**Program Overview:** The Residential Zero Net Energy Transformation (RZNET) program is an innovative way of serving multifamily and manufactured homes with a path to zero net energy (ZNE). The RZNET program aims to transform multifamily and manufactured home community owners, operators, and residents into knowledgeable stewards of water, electricity, and natural gas. RZNET program participants are put on the path to zero net energy, beginning with direct install measures, complimentary ASHRAE Level 1 audits, sales consultations, solar photo voltaic (PV) installations, and battery storage. Additional funding was needed to fulfill multifamily projects in the 2024 pipeline.

#### **Program Strategies and Outcomes:**

The program exceeded its initial TSB goal and received additional funding to allow the program to continue through 2024 without interruption. Leading with no-cost direct install measures, followed by an offer of a complimentary energy assessment and sales consultation yielded results, particularly in therms savings. The RZNET program identified opportunities for upgrading inefficient water heating and HVAC equipment that resulted in the sale and installation of high efficiency water heating and HVAC systems. There were regular coordination meetings with large multifamily portfolio managers supporting the ongoing implementation of direct install EE and ZNE opportunities. The program combines efforts with San Diego County Water Authority high-efficiency toilets for SDG&E RZNET customers. Providing both programs

concurrently improved customer satisfaction and resulted in fewer customer touches. Geotagged timestamped photos continued to be an integral part of RZNET's quality assurance plan, providing assurance that program measures reported were installed. Lifecycle refrigerant management, smart fan controllers, and heat pump water heaters were introduced to the program. Due to these strategies, the program achieved its goals.

## **SDGE4040 – IDSM Local Residential Behavioral Program**

**Program Segment:** Resource Acquisition

**Program Implementer:** Bidgely, Inc.

**Program Overview:** The Home Energy Awareness and Reduction (HEAR) Program delivers comparative home energy reports to residential customers, encouraging them to reduce energy consumption through data-driven insights and behavioral nudges. These reports, sent on a regular cadence, encourage energy-efficient behavior at both the whole-home and appliance-use levels, promoting demand shifting and peak conservation. The program leverages peer comparisons, energy usage insights, and personalized recommendations to drive behavioral change. Reports are delivered through mail, email, a web portal, or a combination of these channels to maximize customer engagement. Participation is based on a randomized control group, ensuring broad customer engagement.

### **Program Strategies and Outcomes:**

Program Year 2024 marked the first full year of HEAR with the current implementer, who sent reports to approximately 950,000 customers. During the second and third quarters, the program refined its energy savings recommendation language to align with new promotions and energy-saving strategies. While the program exceeded its therm savings goals, it fell short of kWh targets due to two primary factors, (1) a higher-than-anticipated shift to solar among eligible customers in the first quarter, reducing the potential kWh treatment pool, and (2) unexpected delays in paper report distribution affecting program consistency. To mitigate these challenges, the implementer refilled the cohort of treated households in quarters one and three, ensuring a sustained impact. Savings from these newly treated customers are expected to be measurable approximately 12 months after their first engagement with the program. Additionally, process improvements with paper suppliers were implemented to prevent future delays with paper reports. Key activities and highlights included:

- Distributed more than 7.4 million personalized digital insights to HEAR recipients, achieving an open rate exceeding 64%.
- Delivered more than 1.6 million paper reports to electric, dual-fuel, and solar customers.
- Achieved over 150% of the therm savings target.
- Developed a Behavioral Demand Response initiative for potential targeted DR engagement.

The HEAR Program will continue refining its strategies to enhance engagement, optimize savings, and drive impactful energy reductions for residential customers.

### **SDGE4197 – Core Market Access Program - Residential**

**Program Segment:** Resource Acquisition

**Program Implementer:** SDG&E

**Program Overview:** D.23-06-055 required that certain PAs “make available solicitations using market access approaches for residential and commercial downstream opportunities in their territories.”<sup>12</sup> On May 8, 2024, SDG&E launched the Market Access Program solicitation. Additionally, on July 1, 2024, to ensure there was no service interruption between the closure of the Summer Reliability Market Access Program and the launch of the third-party Market Access Program, SDG&E launched SDGE4197 Core Market Access Program – Residential. The interim program continued to offer aggregators the opportunity to provide customers with options not available through conventional EE programs to reduce energy usage. Due to the mid-year launch date, there was no participation in 2024.

#### **Program Strategies and Outcomes:**

The program utilized aggregators to identify various EE projects for SDG&E’s residential customers that deliver measurable TSB. Additionally, aggregators marketed the program’s offerings and benefits and offered technical assistance. The program utilized population-level NMEC rules and methodologies to determine verified energy savings. A PFP payment structure based on TSB provided incentives to aggregators for identifying EE projects that delivered measurable peak (4pm-9pm) demand savings, notably during summer months and between the hours of 4pm to 7pm (Peak) and 7pm to 9pm (Net Peak). Specific objectives included (1) open

---

<sup>12</sup> *Id.*

access to qualified aggregators to facilitate wider contractor and customer participation; (2) providing incentives aligned with the value to the grid; and (3) providing technical assistance to customers to achieve energy savings.

## **Agricultural Sector Programs**

### **1. SDGE4009 - Agricultural Growers Services Program – AgEASY**

**Program Segment:** Resource Acquisition

**Program Implementer:** Cascade Energy, Inc.

**Program Overview:** The AgEASY program offers a suite of EE services to SDG&E’s agricultural sector, tailored to their business type, operation size, financial needs, and geography. AgEASY, implemented by Cascade Energy, provides training for customers and vendors, engineering support, and incentives for the small and medium businesses that make up most of SDG&E’s agriculture customers. The AgEASY program also presents opportunities to integrate EE and demand response.

#### **Program Strategies and Outcomes:**

Throughout 2024, SDG&E maintained regular meetings with Cascade Energy to review outreach strategies, technical guidance, challenges, and successes. Cascade developed monitoring templates and provided quarterly updates on activities related to enrollments, inspections, engineering reviews, and invoicing. Program and marketing materials including flyers, applications, and tax-credit information were created and approved for distribution. Outreach efforts resulted in connections with trade associations, vendors, potential participants and key stakeholders. Cascade continued partnerships and participated in notable events including:

- Membership and meeting participation in the San Diego Farm Bureau
- Sponsorship of Farm Bureau Golf Tournament
- Meet-and-greet event with California Secretary of Agriculture at the San Diego County Fair
- Flower and Plant Association to connect with local greenhouse growers

As a result of marketing and outreach strategies, approximately 15 projects were enrolled in 2024 resulting in more than \$600,000 TSB, 90,000 net therms, and approximately \$50,000 in incentives to farm and nursery projects. While the program hit its therm goal, the program did not meet its kWh goal.

## **Industrial Sector Programs**

### **1. SDGE4006 – Industrial Sector Program**

**Program Segment:** Resource Acquisition

**Program Implementer:** Cascade Energy, Inc.

**Program Overview:** The Savings Measurement Assistance Rebate & Training (SMART) Industrials program offers a suite of energy efficiency services to SDG&E's entire industrial sector, tailored to individual business type, operation size, and financial needs. The suite of offerings includes custom, deemed, NMEC, and strategic energy management (SEM). Through these offerings, SMART Industrials provides training for customers and vendors, engineering support, and incentives for SDG&E's industrial customer base, which is small in size compared to the other IOUs.

#### **Program Strategies and Outcomes**

The primary program strategy to facilitate energy savings is identifying the program element that best suits the customers' needs. SEM requires the most involvement from customers but also offers elements that are otherwise not available in other offerings. These elements include energy management training, access to energy management software, and a minimum of two years of engagement with the program, during which projects can be completed and incentives received. There are four large customer cohorts and one small to medium customer cohort. Over 30 customers were enrolled with a majority continuing into 2025. While the program surpassed its therm goal, it did not meet its kWh goal.

## **Public Sector Programs**

### **2. SDGE4010 – Local Government Customer Program**

**Program Segment:** Resource Acquisition

**Program Implementer:** Okapi Architecture, Inc.

**Program Overview:** The Climate Action Plan for Zero Net Energy (CAP4ZNE) program provided a concierge approach tailored to the needs of each customer. The program offered individual Partner Climate Action Paths tailored for participating Local Governments aimed at the customer's top energy-consuming facilities. The CAP4ZNE program was designed to work with decision makers directly, (e.g., local government officials, general managers, or facility

personnel).

**Program Strategies and Outcomes:**

The intended strategies include supporting leaders by equipping them with knowledge and tools to make informed decisions on EE upgrades, providing incentives for EE upgrades, eliminating barriers to public sector participation by developing tailored solutions and financing options, and influencing private sector participation through reach codes and engagement. The implementer collaborated on facility audits conducted to identify potential energy and water saving opportunities and to improve systems outside of the on-going retro-commissioning process. Outreach efforts and facility audits provided opportunities for cross-promotion of On-Bill Financing, Demand Response offerings, and electrification and fuel substitution measures that were ultimately included in program offerings. The program completed only one project due to significant obstacles, including municipalities' third-party contracting procurement rules, Energy Service Companies (ESCO) collaboration requirements, and municipal budget shortage.

Due to the challenges in the program structure, on September 16, 2024, SDG&E submitted AL 4514-E/3341-G, requesting termination of this program, which was subsequently approved and effective on October 16, 2024. Pursuant to the contract, SDG&E and the program implementer completed all shutdown activities and the program was closed on December 31, 2024.

**SDGE4012 – Federal Customer Services Program**

**Program Segment:** Resource Acquisition

**Program Implementer:** TRC Solutions, Inc.

**Program Overview:** The San Diego EnergyLink program provides program implementation services, including marketing, outreach, engineering, operations, customer service, and data management and reporting to federal customers of SDG&E. Energy savings are primarily delivered through direct customer outreach of targeted offerings including, deemed, custom, and NMEC. Federal customers eligible for incentives within this program include: (1) Federal buildings (including hospitals owned and/or operated by the federal government); (2) Department of Defense (DoD) facilities, including military bases; and (3) Tribal nations that are electric and/or gas customers of SDG&E on qualifying rate schedules.

**Program Strategies and Outcomes:**

The primary focus was achieving energy savings for federal customers through fostering

partnerships with stakeholders including SDG&E's Federal Turnkey team. This relationship facilitated deemed, custom and NMEC projects for around two dozen DoD and federal sites. To ensure a seamless customer experience from legacy program offerings, the San Diego EnergyLink program team initiated formal assessments of customer sites. These audits, primarily led by TRC's subcontractor, Information & Energy Services, Inc. (IES), filled gaps to perform technical aspects of project delivery. The TRC/IES team completed ASHRAE Level II audits of more than 1.7 million square feet of space for DoD sites in 2024. Targeted outreach to Tribal customers was also a focus in 2024, where projects were completed for five customers. Deemed projects included tank and pipe insulation for Tribal customers that have gas service from SDG&E.

The program year was not without its challenges, leading to the program missing its TSB goal. The program team completed NMEC analysis for four projects in late 2024 for Federal Government customers. While two projects had measured savings in line with original estimates, the other two projects were invalidated due to customer site construction activities. Additionally, a large lighting project for a military base was cancelled as the implementation team procured and installed materials in advance of the notice to proceed. Several other projects were delayed or cancelled due to shifting customer priorities and inability to engage with authorized stakeholders.

### **III. MARKET SUPPORT SEGMENT PROGRAMS**

#### **1. SDGE3262 – SW – FIN – On-Bill Finance**

**Program Segment:** Market Support

**Program Implementer:** SDG&E

**Program Overview:** The On-Bill Financing (OBF) program is SDG&E's interest-free, unsecured finance offering designed to facilitate the purchase and installation of qualified EE and demand response measures for eligible non-residential customers, including multifamily property owners or management companies, who might not otherwise install EE measures, primarily due to capital constraints. Approved customers who install qualified equipment are eligible to receive a full rebate or incentive by participating in SDG&E or third-party programs and financing for the remainder of the project cost. Customer loans are repaid through a fixed monthly installment on the customer's utility bill.



**Program Strategies and Outcomes:**

The OBF program supports financing of approved measures and projects. SDG&E's OBF staff works with third-party program implementers and SDG&E's programs advisors by offering support resources throughout the customer's EE journey, enabling SDG&E to provide alternative options for customers who may have financial constraints to install EE projects. By enabling qualified customers to complete EE projects with no up-front costs, OBF eliminates one of the major barriers to participation in EE. SDG&E has seen a reduction in projects as legacy and core programs have transitioned to new program implementers. SDG&E continues to implement a customer cap to ensure that funding remains available for more customers.

In 2024, OBF facilitated one project which enabled energy savings of approximately 97,500 kWh. SDG&E's existing loan default rate of one percent is consistently low year over year. Payback and eligibility requirements for business projects continue to be a challenge for certain customers. For comprehensive, multi-measure projects, the payback tends to be much longer than the 15-year maximum required for business projects to qualify.

**2. SDGE3280 – 3P – IDEEA365**

Innovative Designs for Energy Efficiency Activities (IDEEA) 365 is a cross-cutting third-party solicitation program that supports the "rolling" solicitation concept and is focused on new, innovative programs. The program was designed to allow for continuous introduction of innovative ideas and technologies into the EE portfolio by drawing from the skill, experience, and creativity of the EE community and third-party implementers. The IDEEA program creates a mechanism for competitive, year-round solicitations for new third-party programs,

**Program Strategies and Outcomes:**

In 2018, SDG&E began the implementation of third-party solicitations, which included setting up its EE Procurement Review Group (PRG), hiring Independent Evaluators (IE) and developing best practices with other utilities. In 2024, SDG&E continued to develop and refine internal processes and procedures, utilizing supply management best practices and an experienced team to ensure that all the guidelines and requirements of the Commission and the EE PRG were met. SDG&E executed contracts for the following programs, which contributed to SDG&E exceeding the 60% third-party outsourcing compliance requirement:



<b>Solicitation</b>	<b>Advice Letter Submitted</b>	<b>Advice Letter Approved</b>	<b>Implementation Plan Webinar</b>
Residential Equity, Education and Outreach	4/9/2024	5/9/2024	6/21/2024
Retail, Office and Wholesale	9/16/2024	10/16/2024	12/02/2024
Groceries, Restaurants and Food Storage	12/27/2024	01/27/2025	03/07/2025
Private Institutions and Healthcare	1/15/2025	2/14/2025	4/01/2025
Lodging - Hotels and Motels	1/21/2025	2/20/2025	4/04/2025

### **3. SDGE4174 – Workforce, Education & Training Programs**

**Program Segment:** Market Support

**Program Implementer:** Richard Heath & Associates

**Program Overview:** The Learning Energy and Resources Nexus (LEARN) program advances EE knowledge and skills across various sectors, focusing on upskilling workforce and trade professionals and educating SDG&E customers. The program leverages educational techniques, including online courses, video-based microlearning, and interactive webinars to make learning accessible and engaging. Additionally, the program collaborates with educational organizations to enrich curricula with EE resources through the Core Energy Education Collaboration (CEEC) initiative.

This learning platform offers mobile-friendly coursework, animations, and simulations that mimic real-world applications. Interactive webinars support the learning experience by facilitating direct engagement with EE experts and peers. The program’s website is a hub for career pathway maps, educational materials, and immersive virtual experiences, such as a 360-degree walkthrough of an energy-efficient home.

#### **Program Strategies and Outcomes:**

The LEARN program launched in April 2024 and began ramp-up, completing pre-launch deliverables such as the marketing implementation plan, marketing infrastructure, printed and digital collateral. The program partnered with around 60 organizations, hosted 21 workshops, engaged around 8,000 participants, and maintained 90%+ customer satisfaction rate. Shared resources, tailored workshops, and campaigns supported the program. The marketing strategy included email campaigns, social media outreach, and in-person events, reaching around 5,800

individuals through webinars and 2,690 via on-demand platforms. Strong relationships with industry partners, manufacturers, training organizations, and community groups enhanced the program's impact, particularly in disadvantaged communities. Collaborative efforts included resource sharing, co-hosted workshops, and cross-promotional activities, enhancing program accessibility and visibility. The program engaged with 18 training partners and four curriculum developers, initiating discussions with potential collaborators like the U.S. Green Building Council California, SkillCat, and Energy Vanguard. A total of 257 new training modules were published, totaling 370 available courses. The program also established a presence on social media. Relationships with industry partners, manufacturers, training organizations, community groups supported the program's impact, particularly in disadvantaged communities. Collaborative efforts included resource sharing, co-hosted workshops, and cross-promotional activities, enhancing program accessibility and visibility. The program faced challenges reaching the 51% disadvantaged worker participant rate, achieving only 23%. Efforts to identify barriers and adapt strategies for broader participation are ongoing.

#### **4. SDGE4175 – Local Residential Fuel-Substitution**

**Program Segment:** Market Support

**Program Implementer:** SDG&E

**Program Overview:** Customer Home Electrification Readiness (CHERP) is a program designed to assist income-qualified residents in San Diego County install EE measures through a concierge service. It focuses on fuel substitution, renewable energy, energy storage, and demand response. CHERP provides a comprehensive approach by packaging various existing programs and supporting multi-distributed energy resources (DER) projects. It offers guidance on PV solar systems, panel upgrades, heat pump water heaters, heat pump HVAC systems, and energy storage. Additionally, CHERP educates customers and contractors via newly created tools on EE technologies, available incentives, and comprehensive DER projects.

#### **Program Outcomes and Strategies:**

AL 4444-E approved CHERP as a core portfolio program to be launched during the 2024 – 2027 Business Plan cycle. The CHERP budget was allocated for the program years 2025-2027 with program launch anticipated in 2025. In 2024, a retroactive fund shift was completed to account for SDG&E's internal labor to manage the solicitation for CHERP. SDG&E's internal

labor activities during 2024 included, but were not limited to, the development of the Program, regulatory obligations associated with filing Program Advice Letter, request for proposal solicitation, reviewing submitted proposals, and selection of CHERP vendor(s).

## **5. SDGE4184 – Non-Residential Behavioral Program**

**Program Segment:** Market Support

**Program Implementer:** Bidgely, Inc.

**Program Overview:** The Business Energy Report (BER) program is designed to help Small Business ( $\leq 20$  kW) customers achieve energy savings through personalized, data-driven business energy reports. By leveraging appliance-level energy use analysis (disaggregation), the program identifies key opportunities for businesses to optimize energy consumption. A key priority of the BER program is supporting hard-to-reach customers and businesses in disadvantaged communities. Participation is based on a randomized control group. The program's primary goal is to empower energy report recipients to adopt energy-efficient behaviors and equipment upgrades that reduce consumption. By increasing awareness of energy usage, the program promotes demand shifting and peak load conservation, offering businesses actionable insights and customized efficiency recommendations.

### **Program Strategies and Outcomes:**

Program Year 2024 marked the official launch of the BER program with ramp up activities completed during the first quarter of 2025. Throughout the second and third quarters, the program implementer focused on data integration, system configuration, and marketing material approval. The initial email and paper reports were distributed in the third quarter, coinciding with the launch of the integrated web platform. The program distributed paper and email reports to approximately 30,000 small business customers but only achieved an email open rate of 50% and a click-through rate of 4%. The BER will not report any savings for 2024 and will operate for a full year to establish baseline savings. The independent evaluator will provide a report in Q1 2026 regarding the program. If it is determined that the program cannot achieve any meaningful savings, SDG&E will reassess and adjust its strategies as needed.

## **IV. EQUITY SEGMENT PROGRAMS**

### **1. SDGE4173 – Small Business Outreach**

**Program Segment:** Equity

**Program Implementer:** Resource Innovations, Inc.

**Program Overview:** The Small Business Saver program (SBS) delivers energy bill savings to SDG&E's micro and small business customers with a monthly maximum demand of  $\leq 20$  kW (SB) within disadvantaged communities and/or are considered hard-to-reach customers. The program achieves this through local partnerships with subcontractor Environmental Innovations (EI) and California Green Business Network (CAGBN), as well as Community Based Organizations (CBOs) and trade allies for customer outreach. The program offers energy education, bill analysis, direct install measures, and information about other EE and demand response programs. SBS aims to achieve key objectives, including engaging 5,500 customers through targeted outreach, providing customer first-year energy bill savings, and training trade allies to better serve their communities. The program is designed to improve customer satisfaction by providing customer service, making EE accessible, and ensuring the participation process is simple.

**Program Strategies and Outcomes:**

During the first several months of 2024, ramp-up activities included preparation of program documentation, including: program implementation plans, marketing and collateral, and program manual. Project assessments began in June 2024, and the first installations were completed in August 2024. By the end of 2024, a total of 120 small businesses were served through the program.

**SDGE4176 – Residential Equity Program**

**Program Segment:** Equity

**Program Implementer:** Global Energy Services, Inc.

**Program Overview:** The Community Education & Outreach (CEO) program is designed to educate and engage residential customers in disadvantaged communities, hard-to-reach customers, and equity-focused communities across seven cities within the SDG&E service territory. The program aims to increase customer awareness of SDG&E's EE and demand response programs. Through community engagement and in-person outreach activities, the CEO program provides in-language messaging to diverse customer groups. The program utilized seminars, community outreach booths, multi-family facility outreach, and in-home surveys.

### **Program Strategies and Outcomes:**

In 2024, the CEO program implemented several strategies including; delivering five bilingual seminars in English and Spanish, hosting 57 booths at farmers markets, food banks, senior centers, cultural festivals, and health fairs, engaging a total of 6,940 customers from disadvantaged and hard to reach communities, reached more than 6,400 residents and property owners across 60 multi-family units, conducted 180 energy assessments, distributed 10,000 doorhangers in English and Spanish to increase visibility and engagement in residential communities. Social media campaigns included 60 targeted Instagram ads and 35 Spanish-language radio spots aired.

Although the program made significant progress, it encountered challenges due to a compressed timeline, which limited opportunities to refine strategies during the early stages of implementation. While the program established a relationship with a school district, preexisting school schedules limited the implementation of initiatives during the year.

## **V. CODES & STANDARDS PROGRAMS**

### **1. SDGE3251 – SW C&S – Compliance Enhancement**

The Compliance Enhancement (CE) subprogram supports increased compliance with the adopted Building Energy Efficiency Codes and the Appliance Standards. Compliance enhancement and improvement activities complement advocacy work in maximizing verified, persistent savings from codes and standards activities. The CE subprogram targets market actors throughout the compliance chain, providing education, outreach, technical support, and resources to improve compliance with both building and appliance energy standards.

### **Program Strategies and Outcomes:**

The CE subprogram strives to maximize compliance with Title 24, Part 6 and Title 20 to support California's EE and carbon reduction goals. Under the Energy Code Ace (ECA) brand, the CE program effectively drives higher compliance rates by enacting behavior change throughout the building and appliance efficiency supply chains. Training builds knowledge and skills; tools and resources enable users to take desired actions; outreach raises awareness and motivation. Key 2024 accomplishments included:

- Delivered 180 training courses to 4,600+ participants, achieving a 23% knowledge increase and 97% satisfaction.

- ECA website had 33,866 registered users in 2024, with 6,479 new users.
- Reference Ace received 64,514 views for Title 24 Energy Code lookups.
- Users downloaded 183,640 Energy Code Ace resources, showing high demand for compliance fact sheets and checklists.
- Promoted 9 educational tools, including Reference Ace, Timeline Ace, Forms Ace, and Virtual Compliance Assistant (VCA).
- VCA assisted in submitting 55,187 energy code compliance projects.
- Grew social media presence: Facebook (94 followers, 558K impressions, 3,087 clicks) and LinkedIn (779 followers, 357K impressions, 3,476 clicks).
- Sent 181 promotional email campaigns with 979,490 sends, 271,738 opens, and 25,128 clicks.
- Attended 46 industry conferences, promoting Title 24 and Title 20 compliance education.
- Distributed 58 new 2022 T24 Energy Code compliance resources at conferences.
- Began updating tools, training, and resources for the 2025 Energy Code, offering “What’s New in 2025” courses and fact sheets.

### **SDGE3252 – SW C&S – Reach Codes**

The Reach Codes (RC) subprogram provides technical support and stakeholder outreach and education to local governments that seek to adopt local energy ordinances (reach codes) that exceed statewide Title 24 Building Energy Code (Part 6) minimum requirements and meets Title 24 CALGreen (Part 11) for new buildings, additions, or alterations. The RC subprogram support for local governments included pre-adoption research and analysis to establish performance levels and cost effectiveness relative to Title 24 by climate zone, drafting model ordinance templates to facilitate adoption and encourage regional consistency, assistance for completing the application process for approval by the CEC (California Energy Commission) and BSC (Building Standards Commission), and supporting post-adoption implementation once effective through trainings, tools, videos, and resources.

### **Program Strategies and Outcomes:**

The RC program supported multiple efforts across California and SDG&E’s service territory to increase adoption of reach codes by local jurisdictions in achieving their Climate Action Plan goals. 2024 Highlights included:

- Supported 14 local jurisdictions in San Diego County to evaluate reach codes policies and ordinances.

- Supported City of San Diego and Encinitas staff on the “High Performance Reach Code (electric preferred)” with model code language, presentations, and responding to inquiries from City Councils, committees, and other key external stakeholders.
- Supported City of San Diego’s Zero Emissions Municipal Building Policy (ZEMBOP) with technical assistance on updates to their Sustainable Building Policy, Building Design Guidelines, and developed prescriptive EE and electrification ZEMBOP measure recommendations.
- Supported Chula Vista’s Building Performance Standard implementation in educating the 500+ building owners for 800+ buildings through website updates, fact sheets, public workshop, 5 mailings, and coordinated outreach strategies for staff.
- Supported Encinitas post reach code adoption implementation with 6 fact sheets, 3 interactive checklists, electric ready building design guidelines, 1 educational video, 3 training sessions including a Public Workshop of 77 stakeholders.
- Developed the [www.calgreeninfo.com](http://www.calgreeninfo.com) educational website in collaboration with State Agencies and Stakeholders with key training, tools, and resources for T24 CALGreen compliance.

### **SDGE3253 – SW C&S – Planning Coordination**

The Planning & Coordination (PC) subprogram works with IOUs and key stakeholders on C&S strategies, goals, initiatives, and projects. This includes expanded scope to support energy efficiency, electrification, greenhouse gas reduction, alternative fuel vehicles, grid flexibility and sustainability, indoor air quality, and equity considerations. The planning element of the PC subprogram includes long-term planning and scenario analyses, modeling of impacts from potential C&S program activities relative to California policy goals. The coordination element includes C&S coordination with other internal and external stakeholder groups to integrate the influence of future codes and standards for all homes and buildings.

#### **Program Strategies and Outcomes:**

The Planning and Coordination (PC) subprogram takes an integrated approach to strategic initiatives and projects, perspectives, relationships, and expectations of multiple market actors to meet the various decarbonization goals. The PC subprogram creates multiple market strategies and resources to move the construction market toward decarbonization, greenhouse gas, and climate goals. Key 2024 accomplishments included:

- Built the “Energy Education and Resource Hub” for the San Diego Region



targeting local governments by providing quick access to energy code trainings, Title 24 Part 6 resources, reach codes, decarbonization resources, and regional case studies.

- Assisted the Port of San Diego with climate initiatives through Title 24 Lunch & Learns, EV charging strategies, and decarbonization modeling strategies for their headquarters building and annex.
- Educated stakeholders on new construction forecasts, project tracking, decarbonization strategies, T&D coordination, load profile analysis, future resiliency measure research, Building Performance Standards (BPS), and the Bottoms Up Grid Model Advanced Profiles (BUGMAP) tool.
- Created a “Building Electrification Tracker” database of potential electrification projects and tracked residential builders moving towards all-electric construction.
- Developed a “Small Lot Analysis Tool” to analyze the code impact on the increased demand of accessory dwelling units (ADU) in the San Diego Region.
- Launched the “Building/Transportation Electrification Equity Project” to develop an equity framework toolkit to assess the impacts of electrification, resiliency, and BPS.
- Created Electrification Fact Sheets to educate stakeholders on code requirements and benefits of electrification technologies, including references to rebates and incentives.
- Supported updates to EV infrastructure and EVSE requirements under CALGreen (Title 24, Part 11) for the 2022 Interim and 2025 Code Cycle. In collaboration with SDG&E, SCE, and PG&E, provided analysis for CARB’s request to the California Building Standards Commission and HCD.

## **VI. OTHER PROGRAMS & ACTIVITIES**

### **Market Transformation**

D.19-12-021 requires the IOUs co-fund a \$310 million dollar initiative to transform the EE market. PG&E is the lead fiscal agent and selected Resource Innovations as the third-party Program Administrator. SDG&E’s portion of the Co-Funding Agreement is \$43.4M, paid over eight years, with cost recovery through the Public Purpose Program charge.

### **Coordination with San Diego Regional Energy Network**

OP 7 of D.21-05-031 requires all PAs to continue to prepare and submit Joint Cooperation Memoranda (JCMs), according to the existing requirements in D.18-05-041, except that the JCMs may be included for the upcoming program year as an attachment in each PA’s EE Annual Report.



The JCM between SDG&E and SDREN is available on CEDARS for reference. D.23-06-055 OP 35 supersedes Decision D.18-05-041 and D.21-05-031 requiring submission of a JCM 60 days after Commission approval of True Up and Mid Cycle Tier 2 Advice Letters. The JCM between SDG&E and SDREN is available on CEDARS for reference.

### **Third Party Contract Upstream/Midstream Installation Verification**

OP 13 of D.23-06-055 requires portfolio administrators to “identify and describe the approaches they will take to verify upstream and midstream installations, beginning with the annual reports due in 2025.” SDG&E responds as follows: SDG&E serves as the lead administrator for two upstream or midstream programs, and SDG&E collects end-user data elements for each savings claim to verify upstream and midstream installations. Data collected includes, but is not limited to, locations of installations (e.g, customer names and addresses) and contact information. Additionally, both SDG&E and its third-party implementers perform inspections for a representative sample of sites to confirm that incentivized equipment is installed. SDG&E consulted with its third-party implementers during contract negotiations, referencing D.23-06-055 as well as program evaluation studies, to ensure that its contracts document the process, steps, and collected data elements necessary for program evaluability. SDG&E has identified these approaches for Commission staff in its Responses to Recommendations (RTR) reports following program evaluation studies

**Appendix A**  
**Annual Report Tables**

## Appendix A: SDG&E Portfolio Supporting Data

Please review the file: “SDG&E 2024 Annual Report Data Tables,” uploaded to the CEDARS website (<https://cedars.sound-data.com/documents/standalone/list/>), to view 2024 Supporting Data including the following tables:

Tab	Content
<b>Tab 1 – Savings &amp; Goals</b>	The purpose of Table 1 is to report the savings achievements of the energy efficiency portfolio of programs implemented by SDG&E for the 2024 program year toward the CPUC Adopted Goals. The annual impacts are reported for 2024 in terms of annual and lifecycle energy savings in GWh (gigawatt hours), annual and lifecycle natural gas savings in Mth (million therms), and peak demand savings in MW (megawatts). The table shows annual savings that reflect installed savings, not including commitments.
<b>Tab 2 – Environmental Impacts</b>	The purpose of Table 2 is to report the annual incremental environmental impacts of the energy efficiency portfolio (for both electricity and natural gas) of programs implemented by SDG&E during the 2024 program year. The impacts should be in terms of annual and lifecycle tons of CO <sub>2</sub> , NO <sub>x</sub> , and PM <sub>10</sub> avoided and should come from the Cost Effectiveness Tool calculator.
<b>Tab 3 – Program Data</b>	The purpose of Table 3 is to report the annual costs expended by SDG&E in implementing the Energy Efficiency portfolio of programs. The report shows the “Total EE Portfolio Expenditures” broken out into the Administrative Costs, Marketing/Advertising/Outreach Costs, Direct Implementation Costs, and Evaluation, Measurement and Verification (EM&V) Cost categories. This table also includes budget and expenditure dollars for Financing Programs/Pilots
<b>Tab 4 – Segment Summary</b>	The purpose of Table 4 is to provide sector and segment level energy savings metrics and data with expenditures.
<b>Tab 5 – Bill Impacts</b>	The purpose of Table 5 is to report the annual impact of the energy efficiency activities on customer bills relative to bills without the energy efficiency programs, as required the Energy Efficiency Policy Manual version 3, adopted in D.05-04-051.
<b>Tab 6 – Savings Use Category</b>	The purpose of Table 6 is to show annual portfolio savings by end-use category, including those savings

	attributable to the Codes and Standards programs.
<b>Tab 7 - Commitments</b>	The purpose of Table 7 is to allow the utilities to report commitments (contractual or incentive) that will produce savings after December 2024. This information will be useful for the Commission's resource planning purposes by enabling program activities to be linked to a particular funding cycle.
<b>Tab 8 – Cap &amp; Target</b>	The purpose of Table 8 is to show the annual Cap & Target performance of the energy efficiency portfolio by budget category (Administrative, Marketing & Outreach, Direct Implementation, and EM&V) as defined in D.09-09-047 and clarified in D.12-11-015.
<b>Tab 9 – BP Metrics</b>	The purpose of Table 9 is to show portfolio savings for numerous key elements based on the activity of SDG&E's local portfolio and the service territory customer population.
<b>Tab 10 – 3P Calculation</b>	The purpose of Table 10 is to demonstrate compliance with Commission D.18-01-004 and D.16-08-019 regarding SDG&E's Third-Party Program solicitations.
<b>Tab 11 – 3P Contract Information</b>	The purpose of Table 11 is to provide detail on Third Party contract information including program sector, contract start and end dates, contract length and contract amount.
<b>Tab 12 – PG&amp;E Marketplace</b>	This table is specific to PG&E. As such, it is not included in the SDG&E annual report.

**Appendix B**  
**Final True Up Reports**

## Appendix B: Final True Up Reports

The purpose of the following tables is to show the Annual True-Up Report submitted to each funding IOU by the other IOUs following a program year and included in the program year Annual Report, as required by the various Co-Funding Agreement. The Annual True-Up Report outlines the following:

- amounts funded by each of the IOUs, per the Co-Funding Agreement;
- a summary of program expenditures and the allocation of these expenditures to each of the IOUs;
- a calculation of interest applicable to each IOUs balance after program funding and expenditure amounts; and
- a calculation of any applicable refund to the IOUs.

### Section 1 – HVAC

Annual True-Up Report						
Program Name: SW Upstream and Midstream Heating, Ventilation, and Air Conditioning (HVAC) Program						
Program Year: 2024						
Lead: San Diego Gas & Electric						
	PG&E	SCE	SCG	SDG&E	Total	Note on Row Content
Proportional Contribution per Load-Share	31.49%	49.75%	8.84%	9.92%	100.00%	For each IOU: its proportional share per CFA Exhibit B
Total Monthly CFA Payments Made	\$ 4,304,188.61	\$ 6,800,043.92	\$ 1,208,289.21	\$ 1,355,908.26	\$ 13,668,430.00	For each IOU: total dollar amount of payments for that Program Year for this SW Program
Total Interest Payment Accrued *	\$ 43,463.98	\$ 53,067.92	\$ (885.56)	\$ 15,258.85	\$ 110,905.19	For each IOU: dollar amount of interest accrued on that IOU's Total Monthly Payments made
Program Costs Actually Spent	\$ 4,272,318.32	\$ 6,749,693.11	\$ 1,199,342.45	\$ 1,345,868.46	\$ 13,567,222.34	For each IOU: proportional share of the total program implementer contract costs spent for that Program Year
Program Costs Committed	\$ 10,057.96	\$ 15,890.24	\$ 2,823.51	\$ 3,168.47	\$ 31,940.18	For each IOU: proportional share of the total program implementer contract costs committed for that Program Year
Annual True-Up Payment Accrued	\$ 65,276.31	\$ 87,528.49	\$ 5,237.69	\$ 22,130.18	\$ 180,172.67	For each IOU: dollar amount calculated as: [Total Monthly Payments Made + Total Interest Payment Accrued - Program Contract Costs Spent - Program Contract Costs Committed]
* Interest is calculated through December 31, 2024 by multiplying the following factors:						
i. the average of the account balance at the beginning of the month and the balance in the account after the program funding and expense but before interest at the end of month						
ii. one-twelfth of the interest rate on three-month nonfinancial Commercial Paper for the previous month, as reported in the Federal Reserve Statistical Release, H.15. or its successor						

## Section 2 – PLA

Annual True-Up Report						
Program Name: SW Plug Load Appliances Program						
Program Year: 2024						
Lead: San Diego Gas & Electric						
	PG&E	SCE	SCG	SDG&E	Total	Note on Row Content
Proportional Contribution per Load-Share	31.49%	49.75%	8.84%	9.92%	100.00%	For each IOU: its proportional share per CFA Exhibit B
Total Monthly CFA Payments Made	\$ 5,631,757.25	\$ 8,897,425.32	\$ 1,580,969.64	\$ 1,774,119.79	\$ 17,884,272.00	For each IOU: total dollar amount of payments for that Program Year for this SW Program
Total Interest Payment Accrued*	\$ (10,107.35)	\$ (27,951.58)	\$ (14,896.29)	\$ (3,003.51)	\$ (55,958.73)	For each IOU: dollar amount of interest accrued on that IOU's Total Monthly Payments made
Program Costs Actually Spent	\$ 5,412,692.32	\$ 8,551,331.94	\$ 1,519,472.85	\$ 1,705,109.80	\$ 17,188,606.91	For each IOU: proportional share of the total program implementer contract costs spent for that Program Year
Program Costs Committed	\$ 219,064.93	\$ 346,093.38	\$ 61,496.79	\$ 69,009.99	\$ 695,665.09	For each IOU: proportional share of the total program implementer contract costs committed for that Program Year
Annual True-Up Payment Accrued	\$ (10,107.35)	\$ (27,951.58)	\$ (14,896.29)	\$ (3,003.51)	\$ (55,958.73)	For each IOU: dollar amount calculated as: [Total Monthly Payments Made + Total Interest Payment Accrued - Program Contract Costs Spent - Program Contract Costs Committed]
* Interest is calculated through December 31, 2024 by multiplying the following factors:						
i. the average of the account balance at the beginning of the month and the balance in the account after the program funding and expense but before interest at the end of month						
ii. one-twelfth of the interest rate on three-month nonfinancial Commercial Paper for the previous month, as reported in the Federal Reserve Statistical Release, H.15. or its successor						

## Section 3 – HVAC QI/QM


Annual True-Up Report						
Program Name: SW Residential HVAC Quality Installation/Quality Maintenance Program (ENERGY EFFICIENCY)						
Program Year: 2024 Energy Efficiency						
Lead: San Diego Gas & Electric						
	PG&E	SCE	SCG	SDG&E	Total	Note on Row Content
Proportional Contribution per Load-Share	31.49%	49.75%	8.84%	9.92%	100.00%	For each IOU: its proportional share per CFA Exhibit B
Total Monthly CFA Payments Made	\$ 2,565,765.18	\$ 4,053,566.77	\$ 720,271.97	\$ 808,268.99	\$ 8,147,872.91	For each IOU: total dollar amount of payments for that Program Year for this SW Program
Total Interest Payment Accrued *	\$ 24,065.91	\$ 28,815.04	\$ (1,396.80)	\$ 8,364.30	\$ 59,848.45	For each IOU: dollar amount of interest accrued on that IOU's Total Monthly Payments made
Program Costs Actually Spent	\$ 1,534,727.88	\$ 2,424,665.35	\$ 430,835.02	\$ 483,470.95	\$ 4,873,699.20	For each IOU: proportional share of the total program implementer contract costs spent for that Program Year
Program Costs Committed	\$ -	\$ -	\$ -	\$ -	\$ -	For each IOU: proportional share of the total program implementer contract costs committed for that Program Year
Annual True-Up Payment Accrued	\$ 1,055,103.21	\$ 1,657,716.46	\$ 288,040.15	\$ 333,162.34	\$ 3,334,022.16	For each IOU: dollar amount calculated as: [Total Monthly Payments Made + Total Interest Payment Accrued - Program Contract Costs Spent - Program Contract Costs Committed]
* Interest is calculated through December 31, 2024 by multiplying the following factors:						
i. the average of the account balance at the beginning of the month and the balance in the account after the program funding and expense but before interest at the end of month						
ii. one-twelfth of the interest rate on three-month nonfinancial Commercial Paper for the previous month, as reported in the Federal Reserve Statistical Release, H.15. or its successor						

Annual True-Up Report						
Program Name: SW Residential HVAC Quality Installation/Quality Maintenance Program (DEMAND RESPONSE)						
Program Year: 2024 Demand Response						
Lead: San Diego Gas & Electric						
	PG&E	SCE	SCG	SDG&E	Total	Note on Row Content
Proportional Contribution per Load-Share	28.71%	62.19%	0.00%	9.10%	100.00%	For each IOU: its proportional share per CFA Exhibit B
Total Monthly CFA Payments Made	\$ 7,546.42	\$ 16,346.64	\$ -	\$ -	\$ 23,893.06	For each IOU: total dollar amount of payments for that Program Year for this SW Program
Total Interest Payment Accrued *	\$ 243.09	\$ 291.06	\$ -	\$ 84.49	\$ 618.64	For each IOU: dollar amount of interest accrued on that IOU's Total Monthly Payments made
Program Costs Actually Spent	\$ -	\$ -	\$ -	\$ -	\$ -	For each IOU: proportional share of the total program implementer contract costs spent for that Program Year
Program Costs Committed	\$ -	\$ -	\$ -	\$ -	\$ -	For each IOU: proportional share of the total program implementer contract costs committed for that Program Year
Annual True-Up Payment Accrued	\$ 7,789.51	\$ 16,637.70	\$ -	\$ 84.49	\$ 24,511.70	For each IOU: dollar amount calculated as: [Total Monthly Payments Made + Total Interest Payment Accrued - Program Contract Costs Spent - Program Contract Costs Committed]
* Interest is calculated through December 31, 2024 by multiplying the following factors:						
i. the average of the account balance at the beginning of the month and the balance in the account after the program funding and expense but before interest at the end of month						
ii. one-twelfth of the interest rate on three-month nonfinancial Commercial Paper for the previous month, as reported in the Federal Reserve Statistical Release, H.15. or its successor						

## Section 4 – 2024 Payment Schedule

The purpose of the following tables is to show the timing of the amounts funded by each IOU for the 2024 program year for each SDG&E Lead SW program.

## SW HVAC



2024 Payment Schedule

SDGE SW Upstream and Midstream Heating, Ventilation, and Air Conditioning (HVAC) Program

Parties	Annual Funding Contribution per Load-Share	2024 Annual Funding Contribution	2024 Payments												
			Payment #1 01/15/24	Payment #2 02/15/24	Payment #3 03/15/24	Payment #4 04/15/24	Payment #5 05/15/24	Payment #6 06/15/24	Payment #7 07/15/24	Payment #8 08/15/24	Payment #9 09/15/24	Payment #10 10/15/24	Payment #11 11/15/24	Payment #12 12/15/24	Total
PG&E	31.490%	\$ 4,304,188.61	\$ 358,682.38	\$ 358,682.38	\$ 358,682.38	\$ 358,682.38	\$ 358,682.38	\$ 358,682.38	\$ 358,682.38	\$ 358,682.38	\$ 358,682.38	\$ 358,682.38	\$ 358,682.38	\$ 358,682.38	\$ 4,304,188.61
SDG&E	9.920%	\$ 1,355,908.26	\$ 112,992.36	\$ 112,992.36	\$ 112,992.36	\$ 112,992.36	\$ 112,992.36	\$ 112,992.36	\$ 112,992.36	\$ 112,992.36	\$ 112,992.36	\$ 112,992.36	\$ 112,992.36	\$ 112,992.36	\$ 1,355,908.26
SCE	49.750%	\$ 6,800,043.92	\$ 566,670.33	\$ 566,670.33	\$ 566,670.33	\$ 566,670.33	\$ 566,670.33	\$ 566,670.33	\$ 566,670.33	\$ 566,670.33	\$ 566,670.33	\$ 566,670.33	\$ 566,670.33	\$ 566,670.33	\$ 6,800,043.92
SCG	8.840%	\$ 1,208,289.21	\$ 100,690.77	\$ 100,690.77	\$ 100,690.77	\$ 100,690.77	\$ 100,690.77	\$ 100,690.77	\$ 100,690.77	\$ 100,690.77	\$ 100,690.77	\$ 100,690.77	\$ 100,690.77	\$ 100,690.77	\$ 1,208,289.21
Total	100.00%	\$13,668,430.00	\$ 1,139,035.84	\$ 1,139,035.84	\$ 1,139,035.84	\$ 1,139,035.84	\$ 1,139,035.84	\$ 1,139,035.84	\$ 1,139,035.84	\$ 1,139,035.84	\$ 1,139,035.84	\$ 1,139,035.84	\$ 1,139,035.84	\$ 1,139,035.84	\$ 13,668,430.00

Footnote 1: Monthly remittance calculation:  
Monthly remittance = 1 / 12 of 2024 annual funding contribution per section II.2)b.

Payment Requirement: The first payment is due by 1/15/2024 via ACH to Lead IOU. Payments #2,3,4,5,6,7,8,9,10,11,12 are due by the 15th of each month WITHOUT further notification from Lead IOU.

Footnote 3: Exhibit B 2024 Program Budget and IOU Funding Contribution of the CFA

Exhibit B

2024 Program Budget and IOU Funding Contribution


Party	Annual Funding Contribution per Load-Share	Annual Funding Contribution
PG&E	31.490%	\$ 4,304,188.61
SDG&E	9.920%	\$ 1,355,908.26
SCE	49.750%	\$ 6,800,043.92
SoCalGas	8.840%	\$ 1,208,289.21
Total Program Annual Budget	100.00%	\$13,668,430.00

For any questions, please contact Kenneth Pitko at [kpitko@sdge.com](mailto:kpitko@sdge.com). Thank you.

For Lead Company AR Wire Use Only (optional)  
(Put any instruction for Lead IOU AR for Payment Record Purpose.)



## SW PLA



2024 Amended Payment Schedule

SW Plug-Load and Appliance Program

Parties	Annual Funding Contribution per Load-	2024 Annual Funding Contribution	2024 Payments														
			Payment #1	Payment #2	Payment #3	Payment #4	Payment #5	Payment #6	Payment #7	Payment #8	Payment #9	Payment #10	Payment #11	Payment #12	Total		
			01/15/24	02/15/24	03/15/24	04/15/24	05/15/24	06/15/24	07/15/24	08/15/24	09/15/24	10/15/24	11/15/24	12/15/24			
PG&E	31.49%	\$ 5,631,757.25	\$ 275,537.50	\$ 275,537.50	\$ 275,537.50	\$ 275,537.50	\$ 275,537.50	\$ 275,537.50	\$ 275,537.50	\$ 275,537.50	\$ 275,537.50	\$ 275,537.50	\$ 275,537.50	\$ 275,537.50	\$ 275,537.50	\$ 275,537.50	\$5,631,757.25
SDG&E	9.92%	\$ 1,774,119.79	\$ 86,800.00	\$ 86,800.00	\$ 86,800.00	\$ 86,800.00	\$ 86,800.00	\$ 86,800.00	\$ 86,800.00	\$ 86,800.00	\$ 86,800.00	\$ 86,800.00	\$ 86,800.00	\$ 86,800.00	\$ 86,800.00	\$ 86,800.00	\$1,774,119.79
SCE	49.75%	\$ 8,897,425.32	\$ 435,312.50	\$ 435,312.50	\$ 435,312.50	\$ 435,312.50	\$ 435,312.50	\$ 435,312.50	\$ 435,312.50	\$ 435,312.50	\$ 435,312.50	\$ 435,312.50	\$ 435,312.50	\$ 435,312.50	\$ 435,312.50	\$ 435,312.50	\$8,897,425.32
SCG	8.84%	\$ 1,580,969.64	\$ 77,350.00	\$ 77,350.00	\$ 77,350.00	\$ 77,350.00	\$ 77,350.00	\$ 77,350.00	\$ 77,350.00	\$ 77,350.00	\$ 77,350.00	\$ 77,350.00	\$ 77,350.00	\$ 77,350.00	\$ 77,350.00	\$ 77,350.00	\$1,580,969.64
Total	100.00%	\$ 17,884,272.00	\$ 875,000.00	\$ 875,000.00	\$ 875,000.00	\$ 875,000.00	\$ 875,000.00	\$ 875,000.00	\$ 875,000.00	\$ 875,000.00	\$ 875,000.00	\$ 875,000.00	\$ 875,000.00	\$ 875,000.00	\$ 875,000.00	\$ 875,000.00	\$17,884,272.00

Footnote 1: Monthly remittance calculation:

Monthly remittance = 1 / 12 of 2024 annual funding contribution per section II.2.b.

Payment Requirement: The first payment is due by 1/15/2024 via ACH to Lead IOU. Payments #2,3,4,5,6,7,8,9,10,11,12 are due by the 15th of each month WITHOUT further notification from Lead IOU.


EXHIBIT B

Amended 2024 Program Budget and IOU Funding Contribution

Party	Proportional Contribution per Load-Share	Original 2024 Annual Contribution	Revised 2024 Annual Contribution
PG&E	31.49%	\$3,306,450.00	\$5,631,757.25
SDG&E	9.92%	\$1,041,600.00	\$1,774,119.79
SCE	49.75%	\$5,223,750.00	\$8,897,425.32
SoCalGas	8.84%	\$928,200.00	\$1,580,969.64
Program Budget	100.00%	\$10,500,000.00	\$17,884,272.00

For any questions, please contact Kenneth Pitsko at [kpitsko@sdge.com](mailto:kpitsko@sdge.com). Thank you.

## SW HVAC QI/QM



2024 Payment Schedule

SDGE Res Heating, Ventilation, and Air Conditioning (HVAC) QI/QM Program

Parties	Annual Funding Contribution per Load-Share	2024 Annual Funding Contribution	2024 Energy Efficiency Payments													Total
			Payment #1	Payment #2	Payment #3	Payment #4	Payment #5	Payment #6	Payment #7	Payment #8	Payment #9	Payment #10	Payment #11	Payment #12		
			01/15/24	02/15/24	03/15/24	04/15/24	05/15/24	06/15/24	07/15/24	08/15/24	09/15/24	10/15/24	11/15/24	12/15/24		
PG&E	31.49%	\$2,565,765.18	\$213,813.77	\$213,813.77	\$213,813.77	\$213,813.77	\$213,813.77	\$213,813.77	\$213,813.77	\$213,813.77	\$213,813.77	\$213,813.77	\$213,813.77	\$213,813.77	\$213,813.77	\$2,565,765.18
SDG&E	9.92%	\$808,268.99	\$67,355.75	\$67,355.75	\$67,355.75	\$67,355.75	\$67,355.75	\$67,355.75	\$67,355.75	\$67,355.75	\$67,355.75	\$67,355.75	\$67,355.75	\$67,355.75	\$67,355.75	\$808,268.99
SCE	49.75%	\$4,053,566.77	\$337,797.23	\$337,797.23	\$337,797.23	\$337,797.23	\$337,797.23	\$337,797.23	\$337,797.23	\$337,797.23	\$337,797.23	\$337,797.23	\$337,797.23	\$337,797.23	\$337,797.23	\$4,053,566.77
SCG	8.84%	\$720,271.97	\$60,022.66	\$60,022.66	\$60,022.66	\$60,022.66	\$60,022.66	\$60,022.66	\$60,022.66	\$60,022.66	\$60,022.66	\$60,022.66	\$60,022.66	\$60,022.66	\$60,022.66	\$720,271.97
Total	100.00%	\$8,147,872.91	\$678,989.41	\$678,989.41	\$678,989.41	\$678,989.41	\$678,989.41	\$678,989.41	\$678,989.41	\$678,989.41	\$678,989.41	\$678,989.41	\$678,989.41	\$678,989.41	\$678,989.41	\$8,147,872.91

Parties	Annual Funding Contribution per Load-Share	2024 Annual Funding Contribution	2024 Demand Response Payments												Total	
			Payment #1	Payment #2	Payment #3	Payment #4	Payment #5	Payment #6	Payment #7	Payment #8	Payment #9	Payment #10	Payment #11	Payment #12		
			1/15/2024	2/15/2024	3/15/2024	4/15/2024	5/15/2024	6/15/2024	7/15/2024	8/15/2024	9/15/2024	10/15/2024	11/15/2024	12/15/2024		
PG&E	28.71%	\$7,546.42	\$628.87	\$628.87	\$628.87	\$628.87	\$628.87	\$628.87	\$628.87	\$628.87	\$628.87	\$628.87	\$628.87	\$628.87	\$628.87	\$7,546.42
SDG&E	9.10%	\$2,391.94	\$199.33	\$199.33	\$199.33	\$199.33	\$199.33	\$199.33	\$199.33	\$199.33	\$199.33	\$199.33	\$199.33	\$199.33	\$199.33	\$2,391.94
SCE	62.19%	\$16,346.64	\$1,362.22	\$1,362.22	\$1,362.22	\$1,362.22	\$1,362.22	\$1,362.22	\$1,362.22	\$1,362.22	\$1,362.22	\$1,362.22	\$1,362.22	\$1,362.22	\$1,362.22	\$16,346.64
SCG	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	100.00%	\$26,285.00	\$2,190.42	\$2,190.42	\$2,190.42	\$2,190.42	\$2,190.42	\$2,190.42	\$2,190.42	\$2,190.42	\$2,190.42	\$2,190.42	\$2,190.42	\$2,190.42	\$2,190.42	\$26,285.00

Footnote 1: Monthly remittance calculation:

Monthly remittance = 1 / 12 of 2024 annual funding contribution per section II.2.b. SDGE will update this payment schedule once 2024-27 TUAL is approved by CPUC.

Payment Requirement: The first payment is due by 1/15/2024 via ACH to Lead IOU. Payments #2,3,4,5,6 are due by the 15th of each month WITHOUT further notification from Lead IOU.

Footnote 3: Exhibit B 2024 Program Budget and IOU Funding Contribution of the CFA

Exhibit B

2024 EE Program Budget and IOU Funding Contribution

Party	Annual Funding Contribution per Load-Share	Annual Funding Contribution
PG&E	31.49%	\$ 2,565,765.18
SDG&E	9.92%	\$ 808,268.99
SCE	49.75%	\$ 4,053,566.77
SoCalGas	8.84%	\$ 720,271.97
Total Program Annual Budget	100.00%	\$ 8,147,872.91

Exhibit B

2024-2026 DR Program Budget and IOU Funding Contribution

Party	Annual Funding Contribution per Load-Share	Annual Funding Contribution
PG&E	28.71%	\$ 7,546.42
SDG&E	9.10%	\$ 2,391.94
SCE	62.19%	\$ 16,346.64
SoCalGas	0.00%	\$ -
Total Program Annual Budget	100.00%	\$ 26,285.00

**Appendix C**  
**Revisions to SDG&E's 2023 Annual Report**

T-3 Environmental Impacts of EE Portfolio by Measure Use Category					ORIGINAL								
Measure Use Category	Gross annual tonnes of CO2 avoided <sup>1</sup>	Net annual tonnes of CO2 avoided <sup>1</sup>	Gross lifecycle tonnes of CO2 avoided <sup>1</sup>	Net lifecycle tonnes of CO2 avoided <sup>1</sup>	Gross annual tonnes of NOx avoided <sup>2</sup>	Net annual tonnes of NOx avoided <sup>2</sup>	Gross lifecycle tonnes of NOx avoided <sup>2</sup>	Net lifecycle tonnes of NOx avoided <sup>2</sup>	Gross annual tonnes PM10 avoided <sup>2</sup>	Net annual tonnes PM10 avoided <sup>2</sup>	Gross lifecycle tonnes PM10 avoided <sup>2</sup>	Net lifecycle tonnes PM10 avoided <sup>2</sup>	
Appliance or Plug Load	8,736	8,733	79,892	79,845	2	2	20	20	1	1	7	7	
Building Envelope	10,762	10,566	213,950	212,970	5	5	92	91	1	1	10	10	
Compressed Air	213	213	3,880	3,880	0	0	1	1	0	0	0	0	
Commercial Refrigeration	10,834	10,095	95,322	91,437	3	3	23	22	1	1	8	8	
Codes & Standards (4)	10,763	10,763	206,163	206,163	3	3	47	47	1	1	16	16	
Food Service	2,234	1,738	37,744	31,897	1	1	15	11	0	0	2	2	
HVAC	19,216	18,874	320,538	314,925	7	7	109	106	1	1	20	20	
Irrigation	1	0	10	4	0	0	0	0	0	0	0	0	
Lighting	66,218	65,919	987,251	984,698	17	17	210	210	7	7	82	81	
Non-Savings Measure	-	-	-	-	-	-	-	-	-	-	-	-	
Process Distribution	-	-	-	-	-	-	-	-	-	-	-	-	
Process Drying	-	-	-	-	-	-	-	-	-	-	-	-	
Process Heat	269	269	4,064	4,064	0	0	3	3	0	0	0	0	
Process Refrigeration	-	-	-	-	-	-	-	-	-	-	-	-	
Recreation	1,340	1,330	16,795	16,744	0	0	4	4	0	0	1	1	
Service	-	-	-	-	-	-	-	-	-	-	-	-	
Service and Domestic Hot W	27,408	22,135	288,297	233,084	22	17	227	184	0	0	0	0	
Whole Building	20,004	19,527	265,438	263,171	9	9	99	98	1	1	15	15	
TOTAL	177,998	170,162	2,519,344	2,442,882	69	64	850	797	13	13	161	160	
SOURCE: CET Outputs													
[1] For 2023 PY CO2 emissions in CEDARS is expressed in metric tons for electric and short tons for gas. Conversions are done in this table to represent metric tons (denoted as Tonnes) for the total.													
[2] For 2023 PY, NOx and PM10 emissions in CEDARS are represented as pounds; Conversions are done in this table to represent in metric tons (denoted as Tonnes) for the totals.													
[3] Excludes Energy Savings Assistance (ESA) program savings.													
[4] For the Codes & Standards programs, savings that do not have a standard Use Category appear in the Use Category "Codes & Standards".													
[5] Net energy savings numbers include 5% market effects.													

T-3 Environmental Impacts of EE Portfolio by Measure Use Category					REVISED								
Measure Use Category	Gross annual tonnes of CO2 avoided1	Net annual tonnes of CO2 avoided1	Gross lifecycle tonnes of CO2 avoided1	Net lifecycle tonnes of CO2 avoided1	Gross annual tonnes of NOx avoided2	Net annual tonnes of NOx avoided2	Gross lifecycle tonnes of NOx avoided2	Net lifecycle tonnes of NOx avoided2	Gross annual tonnes of PM10 avoided2	Net annual tonnes of PM10 avoided2	Gross lifecycle tonnes of PM10 avoided2	Net lifecycle tonnes of PM10 avoided2	
Appliance or Plug Load	24,918	8,733	259,633	79,845	6	2	75	20	2	1	20	7	
Building Envelope	17,198	10,566	349,835	212,970	8	5	147	91	1	1	17	10	
Compressed Air	633	213	11,529	3,880	0	0	2	1	0	0	1	0	
Commercial Refrigeration	29,045	10,095	247,385	91,437	8	3	58	22	3	1	21	8	
Codes & Standards	61,073	10,763	1,269,889	206,163	16	3	272	47	6	1	99	16	
Food Service	4,519	1,738	97,261	31,897	2	1	27	11	0	0	6	2	
HVAC	47,951	18,874	863,502	314,925	17	7	266	106	4	1	57	20	
Irrigation	1	0	10	4	0	0	0	0	0	0	0	0	
Lighting	251,026	65,919	3,290,217	984,698	65	17	719	210	25	7	275	81	
Non-Savings Measure	-	-	-	-	-	-	-	-	-	-	-	-	
Process Distribution													
Process Drying													
Process Heat	374	269	5,659	4,064	0	0	4	3	0	0	0	0	
Process Refrigeration													
Recreation	2,729	1,330	33,789	16,744	1	0	8	4	0	0	3	1	
Service													
Service and Domestic Hot W	38,295	22,135	417,773	233,084	30	17	322	184	0	(0)	1	(0)	
Whole Building	29,012	19,527	470,334	263,171	13	9	169	98	2	1	27	15	
TOTAL	506,774	170,161	7,316,816	2,442,881	166	64	2,071	797	43	13	527	160	
SOURCE: CET Outputs													
[1] For 2023 PY CO2 emissions in CEDARS is expressed in metric tons for electric and short tons for gas. Conversions are done in this table to represent metric tons (denoted as Tonnes) for the total.													
[2] For 2023 PY, NOx and PM10 emissions in CEDARS are represented as pounds; Conversions are done in this table to represent in metric tons (denoted as Tonnes) for the totals.													
[3] Excludes Energy Savings Assistance(ESA) program savings													
[4] For the Codes & Standards programs savings that do not have a standard Use Category appear in the Use Category "Codes & Standards"													
[5] Net energy savings numbers include 5% market effects.													