

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

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

Application 19-11-003

And Related Matters.

Application 19-11-004

Application 19-11-005

Application 19-11-006

Application 19-11-007

**AMENDED ANNUAL REPORT ACTIVITY OF
SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ON ENERGY SAVINGS
ASSISTANCE, CALIFORNIA ALTERNATE RATES FOR ENERGY, AND FAMILY
ELECTRIC RATE ASSISTANCE PROGRAMS FOR 2023**

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November 11, 2024

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This report presents the amended 2023 program year results and expenditures for San Diego Gas & Electric Company's (SDG&E or Company) Energy Savings Assistance (ESA), California Alternate Rates for Energy (CARE), and Family Electric Rate Assistance (FERA) Programs. This report consolidates activity for the ESA, CARE and FERA Programs and provides the California Public Utilities Commission's (Commission or CPUC) Energy Division with the necessary information to analyze the low-income programs. Amended content throughout the report is noted in red font and underlined.

Respectfully Submitted,

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SAN DIEGO GAS & ELECTRIC COMPANY



ANNUAL REPORT ACTIVITY ON ENERGY SAVINGS ASSISTANCE (ESA), CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE), AND FAMILY ELECTRIC RATE ASSISTANCE (FERA) PROGRAMS

AMENDED 2023 RESULTS

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2023 ESA, CARE, AND FERA ANNUAL REPORT EXECUTIVE SUMMARY

San Diego Gas & Electric Company (SDG&E or Company) hereby submits its annual report on the ESA, CARE and FERA programs for the program year 2023. These programs are aimed at helping SDG&E's most vulnerable population through the delivery of no-cost weatherization measures and reduced rates on customers' bills. The ESA Program provides income qualified owners and renters with energy efficient appliances, energy education and measures that support the health comfort and safety of customer homes. CARE and FERA extend bill discounts on gas and/or electricity to eligible households, alleviating the energy cost burden for those most affected by such expenses. The content of this amended report includes activities in support of the low-income programs from January 1, 2023, through December 31, 2023.

AMENDED ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL

REPORT

1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY

The ESA portfolio of programs offers no-cost weatherization services, energy efficient lighting, energy efficient appliances, energy education, and other services to income-qualified customers of single family, mobile homes and qualified Deed Restricted and Non-Deed Restricted multifamily buildings in support of reducing energy consumption and costs, while improving the health, comfort, and safety of customers. In 2023, SDG&E's ESA portfolio consisted of the new Main ESA Program, the ESA Common Area Measures (CAM) initiative and the new Multifamily Whole Building (MFWB) Program. Additionally, SDG&E worked towards the implementation of the Pilot Plus and Pilot Deep, focused on providing deeper energy savings to income qualified customers.

In 2023, SDG&E's Main ESA (single family, mobile homes, and multifamily in-unit) program transitioned to an implementer model, "bundling" Outreach and Assessment, Weatherization, Appliance Installation, Natural Gas Appliance Testing (NGAT) and Inspections of gas appliance installation through one ESA program contractor. The transition to the new model provided SDG&E with the opportunity to streamline the delivery of the program and increase opportunities for the installation of energy savings measures by reducing the number of customer visits needed. The Main ESA Program contract for program years 2023-2026 for bundled services was awarded to Richard Heath and Associates (RHA) at the end of 2022. The first quarter of 2023 focused on adjusting operations to align with the new single implementer model. Ramp up activities included finalization of documents, updates to program systems to support invoicing activities, tracking, reporting, and onboarding of new subcontractors. In the second quarter, SDG&E worked through its solicitation process for heating, ventilation, and air

conditioning (HVAC) and water heater repair and replacement services (Water Heater R&R Services). In the third quarter of 2023, SDG&E commenced weekly meetings with RHA to collaborate on process improvements with a focus on strategies to improve energy savings. Throughout 2023, SDG&E and RHA continued to collaborate on efforts to increase energy savings per household. SDG&E initiated a process to investigate potential measure modification opportunities. In the fourth quarter, RHA reported staffing challenges which impacted enrollments and energy savings progress. By the end of the year, the total spend for the Main ESA Program was 69% (\$13,751,896) of its budget.¹ SDG&E achieved 54% (4,533 homes) of its homes treated goal, 37% (~~740,021~~ 745,860 kWh) of its electric savings target, ~~43%~~ 44% (~~7273~~ kW) of its kW demand reduced target, and ~~8%~~ 16% (~~5,789~~ 12,052 therms) of its natural gas savings target.

The ESA CAM initiative (part of the ESA portfolio serving multifamily properties) continued to deliver common area measures to deed restricted properties from January 1, 2023 through June 30, 2023. ESA CAM program exceeded properties treated at 121% of goal, kWh savings at 102% of goal and therm savings at 585% of goal by closing date of June 30, 2023.

On July 1, 2023, the Southern MFWB program successfully launched. The program was welcomed with high interest and significant engagement. By the end of 2023, there was a successful pipeline of 791 property leads, 69 whole building enrollments (SDG&E: 12, Southern California Edison Company (SCE): one, Southern California Gas Company (SoCalGas): 21, SCE and SoCalGas: 35), 38 property assessments, and commencement of installation of basic measures for in-units in the SoCalGas service territory.

¹ In 2023, multifamily in-unit treatment continued to be offered through the Main ESA Program until the new MFWB program was launched on July 1, 2023. The expenses of \$13,751,896 includes ESA Multifamily In-Unit expenses of \$1,799,048. See Appendix G, ESA Program, at Table 2 Main worksheet of the 2023 Low Income Annual Report Program Tables.

The ESA Pilot Plus and Pilot Deep second Request for Proposal (RFP) concluded during the first quarter of 2023 with no successful bidder. SDG&E met with Energy Division during the second quarter, informing them of the challenges in identifying a competitive bidder, and provided regular status updates in its low-income monthly reports. On May 9, 2023, SDG&E submitted Advice Letter (AL) 4223-E/3196-G, requesting to modify the solicitation requirements in Ordering Paragraph (OP) 107 of Decision (D.) 21-06-015, from an open competitive bidding process to sole sourcing with a potential Pilot Implementer. On June 8, 2023, SDG&E's AL was approved. In the third quarter, SDG&E commenced the Request for Quotation (RFQ) with a sole-source Pilot implementer. By fourth quarter contract negotiations commenced with a sole-sourced Pilot implementer. The contract execution took place on January 9, 2024, and the program launched at the end of the first quarter of 2024.

In 2023, SDG&E focused its activities around successfully transitioning to a new ESA portfolio delivery model, which included launching a new Main ESA Program under a single implementer, transitioning HVAC and Water Heater R&R Services to new contracts, sunsetting ESA CAM while developing the Southern MFWB program, and soliciting and negotiating the contract for Pilot Plus/Pilot Deep. While SDG&E addressed implementation challenges with launching a new delivery model, customers continued to access and receive ESA services achieving energy efficiency, reducing utility bill costs, and improving their homes health, comfort, and safety.

The ESA Program experienced significant challenges as it began implementing new program initiatives. These challenges are summarized in this Annual Report, and in greater detail in the Investor-Owned Utilities' Joint Energy Savings Assistance (ESA) Midcycle

Progress Report, filed on December 2023.² In addition to challenges inherent with standing up a new program model, SDG&E also encountered a gap of qualified bidders, a need for longer ramp-up and adaptation time, unanticipated supply chain issues, and contractor workforce challenges. SDG&E focused resources to address these challenges, however, progress towards realizing energy savings goals was delayed.

With only a year of operating the new ESA Portfolio program design, SDG&E is continuously improving its systems and processes to accommodate the new service model. Catching up to the program cycle energy savings goals will be a significant challenge. However, SDG&E anticipates that the administrative groundwork made in 2023 will support positive savings gains through the remainder of the existing program cycle.

Procedural Background

On June 7, 2021, the Commission issued D.21-06-015 (Decision), which approved the applications of the investor-owned utilities (IOUs) and authorized program budgets and requirements for the administration of the ESA, CARE, and FERA Programs for the 2021-2026 program cycle. Most significantly, the Decision approved programmatic changes, including the implementation of the Southern regions MFWB Program to be led by SDG&E on behalf of SoCalGas and SCE, approved the Energy Division's Staff Proposal, a redesign concept of the ESA Program, on a pilot basis, and simplified fund shifting rules. Additionally, the Decision approved a new measure mix for the program that focuses on deeper energy savings. This allowed the IOUs flexibility in managing the portfolio by updating the measure mixes through monthly and annual reporting, established cost effectiveness guidelines, approved and directed

² OP 179 of D.21-06-015 directed Pacific Gas and Electric Company (PG&E), SCE, SDG&E, and SoCalGas to submit a joint mid-cycle progress report, in consultation with the Energy Savings Assistance working group, to the Commission and the service list of the low income proceeding or a successor proceeding by December 31, 2023.

tailored marketing and outreach efforts to reach the program goals, including broadband outreach, approved and directed targeted leveraging efforts to reach the program goals, including with local, state, and federal agencies, water and telecommunication agencies, as well as other low income programs. The content of this report highlights the various program initiatives and activities that address the Decision’s guidance and directives for managing the portfolio of low-income programs.

1.1 Energy Savings Assistance Program Overview
1.1.1 Provide a summary of the Energy Savings Assistance Program elements as approved in D.21-06-015.

Main ESA Program Summary

The Main ESA program provides services to single family and mobile homeowners and renters. The program design is focused on achieving energy savings through targeted outreach efforts, while continuing to offer health, comfort, and safety to low-income customers. In 2023, multifamily in-unit treatment continued to be offered through the Main ESA Program until the new MFWB program was launched on July 1, 2023.

Pursuant to D.21-06-015,³ SDG&E transitioned the ESA Program from a model of homes treated to one focused on providing low-income customers with measures that increase their energy savings and improve their health, comfort, and safety. SDG&E completed competitive solicitations for the implementation of the Main ESA Program in 2022 to prepare for program design transition in the 2023 program year. After reviewing qualified bidders, SDG&E selected RHA to implement the Main ESA Program’s Bundled Services, which includes Outreach, Enrollment, Assessment, Weatherization, Appliance Installation, Inspections and NGAT. SDG&E also solicited for HVAC and Water Heater Repair and Replacement (R&R) Services in

³ D.21-06-015 at OP 56.

2023. The successful bidders were selected, contracted, and launched those services to eligible participants in September and October 2023. However, the transition to the new model was not without challenges. The following section describes the challenges experienced.

Lack of New and Qualified Bidders in Solicitations Limited Bidder Pool

As the IOUs moved to the new program cycle, which requires significant changes in programmatic and administrative requirements, new solicitations were directed to provide opportunities to engage new market players. The Decision contemplated that a larger pool of bidders would provide more competitive ESA Program contractor pricing and address concerns about varying measure costs among the long-standing program implementers. Some market participants, especially smaller and under-resourced organizations, experienced challenges in working through the competitive solicitation process requirements and understanding how to present meaningful bids for the implementation and/or program delivery of the new program cycle. In 2023, SDG&E repeated a solicitation process for its HVAC and Water Heater R&R Services due to insufficient qualified bids received during the initial solicitation effort.

New Policies & Program Design Changes Required Longer Adaptation Time

SDG&E experienced challenges in managing and delivering program design changes within the anticipated transition time. For example, when SDG&E transitioned to a single implementer model, it encountered unanticipated system constraints, which impacted implementation. System business rules set up to monitor and prevent potential fraud contributed to delays in processing invoices to its program implementer. As SDG&E focused on operations and troubleshooting, contractors continued casting a large net for enrollments and installing lower savings, easy-to-install measures. SDG&E learned that a longer ramp-up period is needed when launching a new program to facilitate effective and consistent collaboration with

implementers. Additionally, a longer ramp-up period ensures a thorough understanding of challenges, as well as the identification and acquisition of necessary resources.

Supply Chain Issues Impacted Program Measures and Installation Timing

SDG&E experienced unexpected challenges in the delivery of Program services. One of RHA's appliance vendors went out of business, causing a backlog of 240 appliance deliveries (primarily refrigerators) for the first several months of 2023. RHA worked to restructure production and distribution processes to bring these processes in-house. This led to increased costs due to higher labor expenses and expedited procurement in the initial months. RHA is now maintaining a more diverse supplier network and continuing to monitor their supply chain for performance and efficiency enhancements moving forward.

In September 2023, RHA reported staffing shortages which impacted RHA's customer outreach and enrollment activities, including targeted door-to-door canvassing, working leads, and enrolling customers. RHA took several steps to attract and retain workers and adjusted its onboarding process to give new hires certain field work experience earlier in the training process. By the end of the year, RHA pivoted to onboarding two of its subcontractors to support outreach and engagement activities by Q2 2024.

SDG&E faced additional challenges such as increased costs from inflation, the need for robust contractor training, information system changes, ongoing pandemic concerns, transition to a higher energy savings model, and ISNET safety program requirements. These challenges are described in detail in the Investor-Owned Utilities' Joint ESA Midcycle Progress Report.

Despite these challenges, SDG&E continuously delivered Main ESA Program services to customers. In 2023, SDG&E laid the foundation to advance energy savings including developing a targeted outreach campaign, launching online home energy audits, reviewing the program's measure mix, and preparing for the measure modification process in 2024.

The table below summarizes Main ESA Program expenses and energy savings progress.

SDG&E will carry forward unspent committed contracted funds⁴ to Main ESA Program contracts, as reflected in ESA Table 11 in Appendix G.

ESA Table 1.1.1.1 2023 Main ESA Program Summary⁵			
	2023 Authorized Budget / Forecasted Planning Assumptions	2023 Actual	%
Budget ⁶	\$19,818,827	\$13,751,896	69%
Administrative Budget ⁷	\$5,545,261	\$3,434,224	62%
Homes Treated ⁸	8,326	4,533	54%
kWh Saved	1,997,137	740,021 <u>745,860</u>	37%
kW Demand Reduced	166	7273	43% <u>44%</u>
Therms Saved	74,629	5,789 <u>12,052</u>	8% <u>16%</u>
GHG Emissions Reduced (Tons)	N/A	379 <u>585</u>	N/A

ESA CAM Initiative Summary

The ESA CAM initiative provided natural gas and electric weatherization services, energy-efficient lighting, appliances, and additional services at zero cost to income-eligible deed

⁴ Pursuant to OP 131 of D.17-12-009, SDG&E defines committed funds “as funds that are committed to a specific California Alternate Rates for Energy (CARE) Program/Energy Savings Assistance (ESA) Program contract or customer project. The term “uncommitted funds” is defined as those unspent funds that are not committed to existing CARE Program/ESA Program projects or contracts. The term ‘unspent funds,’ without qualification, refers to all CARE Program/ESA Program authorized yet unspent funds, whether committed or not, unless the term is qualified to specify whether funds are committed.”

⁵ Includes single family (SF) homes, mobile homes (MH), and multifamily (MF) in-unit (Jan-Jun 2023) treatments.

⁶ Budget includes \$2,166,111 in MFWB funds to continue in-unit treatment through the Main ESA Program until the MFWB program was launched on July 1, 2023.

⁷ Administrative budget includes \$449,272 in Multifamily in-unit funds until the MFWB program was launched on July 1, 2023.

⁸ Total homes treated target of 8,326 is derived by using the forecast for Main ESA Program and MF In-Unit from January – June of 2023. The total Annual Household Treated Target reflected in Attachment 1 of D.21-06-015, Table 6 is 11,711. The additional 3,385 homes treated target is reflected in Table 1.1.1.3 of this report.

restricted multifamily property owners and managers. SDG&E’s ESA CAM contract was extended to cater to multifamily CAM customers until the launch of the ESA’s Southern Region MFWB Program through June. SDG&E exceeded properties treated and savings goals before closure on June 30, 2023. The table below provides a summary of the January through June 2023 program activities. In compliance with OP 147 of D.21-06-015, remaining ESA CAM funds not spent prior to the implementation of the MFWB program will be used to “offset collections for the MFWB programs.”

ESA Table 1.1.1.2 2023 ESA CAM Program Summary			
	2023 Authorized Budget / Forecasted Planning Assumptions⁹	2023 Actual	%
Budget	\$2,808,028	\$1,955,093	70%
Administrative Budget ¹⁰	\$280,803	\$87,131	31%
MF Properties Treated	14	17	121%
kWh Saved	200,000	203,993	102%
kW Demand Reduced	N/A	37	N/A
Therms Saved	3,600	21,071	585%

MFWB Program Summary

The Southern MFWB Program offers ESA Program services for In-Unit, CAM, and Whole Building (WB) Measures under one Program to Deed Restricted and Non-Deed Restricted multifamily buildings. D.21-06-015 directed SDG&E to lead the Southern IOUs

⁹ D.21-06-015 directs the IOUs to carry-forward all unspent and uncommitted ESA Common Area Measures funding as of June 30, 2021, into the remainder of program years 2021, 2022 and 2023. The unspent funds as of December 31, 2022, totaled \$2,808,028, to be used for 2023, during the transition to the MFWB Program. ESA CAM Q1-Q2 2023 Goals were filed in SDG&E’s Third-Party Solicitation Advice Letter for MFWB 4115-E/3144-G, under Transition Plan at 14 – 15.

¹⁰ D.17-12-009 at 213 states, “[w]e impose a cap of 10% of ESA Program funds for administrative activities and a ceiling of 20% for direct implementation non-incentive costs.”

(SDG&E, SCE and SoCalGas) in implementing a third party Southern MFWB Program selected through a competitive solicitation process. The Southern MFWB Program provides energy efficiency services to multifamily customers, including in-unit and common area measures, for a holistic approach to treating the whole building. RHA, the selected implementer of the Southern MFWB program received their Notice to Proceed (NTP) letter on December 30, 2022, with an effective date of January 1, 2023. RHA immediately began ramp up activities, including hosting a public webinar to share the Program implementation plan on February 16, 2023. SDG&E continued its close partnership with RHA, collaborating on various program-related tasks. These included finalizing specifications for measures, refining program forms, designing reporting templates, and optimizing the program database. SDG&E compensated RHA for the administrative ramp up cost associated with the activities required to begin program operations while the program opened for customer enrollment.

On July 1, 2023, the MFWB Program launched to provide no-cost and reduced-cost energy efficiency upgrades to eligible affordable multifamily properties and residents in the Southern IOUs service territories. The program began operations using a network of existing ESA contractors, trade allies and a substantial lead list of approximately 400 referrals from the Southern IOUs legacy program. Additionally, both in-unit and CAM customers not enrolled in the existing programs by June 30, 2023 were transitioned to RHA for enrollment.

While no projects were completed in the 2023 program year, the MFWB program was met with enthusiasm, as evidenced by the substantial engagement. RHA completed 69 whole building enrollments (SDG&E 12, SCE 1, SoCalGas 21, SCE and SoCalGas 35), 38 property assessments, and began the installation of basic measures for in-units in SoCalGas's service territory. The Southern IOUs have continued their collaboration with RHA to maintain a strong

pipeline of 791 property leads. Despite these accomplishments, the following factors impacted the program's start and production for 2023.

- **ESA Subcontractor Compensation:** The new single party implementer model required some adjustment for all parties involved. SDG&E collaborated with RHA to facilitate this transition for subcontractors and to ensure their alignment with program goals. For example, SDG&E waived its contractual pay-for-performance retention for 2023 and amended its measure pricing based on feedback from RHA to aid the transition.
- **Resident-Driven Treatments:** The MFWB Program was designed to acquire customers through two pathways: 1) property owners and managers of multifamily properties and 2) individual income-qualified residents of multifamily properties. Because the Program's compensation model was designed for the efficiencies inherent in property-level enrollment, subcontractors found it infeasible to treat individual standalone units. To serve these residents, the MFWB Program has pivoted to work with property owner/managers to turn resident leads into property-wide treatment.
- **Tenant Income Documentation:** Some property owners are hesitant to provide proof of tenant income documentation, which is essential for program compliance. RHA is actively engaging with property owners, addressing their concerns, and emphasizing the benefits of compliance to alleviate such hesitations.

Additionally, SDG&E aimed to integrate and streamline information systems in the Southern region using its Energy Efficiency Collaboration Platform (EECP) as the main system of record for the Southern MFWB Program. The primary goal was to create a more efficient and accessible platform for validating customer data. However, the project faced several challenges, detailed below, that impeded the smooth integration of these systems and required changes in approach.

- **Complex System Integration:** The foremost challenge encountered by the Southern IOUs was the complexity of integrating individual IOU information systems. Each IOU had its own systems, leading to variations in data formats, structures, and processes. For example, some IOUs encountered difficulties in correctly defining and identifying multifamily customers within their systems.
- **New MFWB System:** To address the challenges stemming from the program's complexity, SDG&E turned to RHA for the development of a new system, leveraging their in-house software, RHA Industries. This software streamlined the intake process, enabling tablet-based enrollment, a paperless approach, and the capture of on-site equipment images for utilization in SDG&E quality assurance plan; however, this system development required additional time and effort.

While the initial vision sought efficiency gains through the utilization of SDG&E's EECP system, the decision to incorporate the Implementer's third-party software resulted in significant operational improvements. This combination, with SDG&E's EECP as the primary system of record responsible for invoicing and reporting program activities across the three Southern IOUs, has proven effective. Although individual validation by RHA may not represent the ideal solution, the Southern IOUs are actively engaged in collaboratively addressing and overcoming challenges arising from this approach.

As noted above, the Southern MFWB Program did not launch until July 1, 2023. The table below provides a summary outlining SDG&E's portion of the 2023 Program activity.

ESA Table 1.1.1.3 2023 ESA SDG&E MFWB Program Summary			
	2023 Authorized Budget / Forecasted Planning Assumptions	2023 Actual	%
Budget ¹¹	\$5,698,470	\$958,778	17%
Administrative Budget ¹²	\$569,847	\$652,381	114%
Multifamily Properties Treated	18	0	0%
Multifamily Tenant Units w/in Properties Treated ¹³	3,385	0	0%
kWh Saved	426,674	0	0%
kW Saved	N/A	0	N/A
Therms Saved	22,376	0	0%
GHG Emissions Reduced (Tons)	N/A	0	N/A

MFWB Aggregate Summary

¹¹ Budget excludes \$2,166,111 in multifamily funds to continue in-unit treatment through the Main ESA Program until the MFWB program was launched on July 1, 2023. Total Multifamily In-Unit and Multifamily Whole Building 2023 budget is \$7,864,581, per D.21-06-015 at Attachment 1, Table 11.

¹² SDG&E's 2023 authorized budget of \$5,698,470 includes SDG&E's administrative budget. OP 150 of D.21-06-015 states, "Energy Savings Assistance multifamily whole building (MFWB) programs' administration costs must not exceed 10 percent of the total MFWB program budgets."

¹³ Yearly forecasted homes treated targets were filed in SDG&E's Third-Party Solicitation Advice Letter for MFWB 4115-E/3144-G. MFWB Program goals are for the cycle, per D.21-06-015 at OP 141.

As the Lead IOU for the Southern MFWB Program, SDG&E is providing the total aggregate program costs for SDG&E's, SCE's and SoCalGas's service territories. The Program Implementation costs were managed in accordance with a Co-Funding Agreement amongst the Southern IOUs (SDG&E: 20%, SCE: 31% and SoCalGas: 49%). The table below provides a summary outlining the three Southern IOUs Program activity in 2023. Funds not expended during the current program year will be available for the MFWB Program throughout the program cycle.¹⁴

ESA Table 1.1.1.4 2023 ESA Southern MFWB Program Aggregate Summary			
	2023 Authorized Budget / Forecasted Planning Assumptions	2023 Actual	%
Budget ¹⁵	\$24,214,554	\$2,503,653	10 %
Administrative Budget	\$2,421,455	\$1,004,322	41%
Multifamily Properties Treated ^{16,17}	87	0	0%
Multifamily Tenant Units w/in Properties Treated	15,595	0	0%
kWh Saved	3,916,471	0	0%
kW Saved	N/A	0	N/A
Therms Saved	227,457	0	0%
GHG Emissions Reduced (Tons)	N/A	0	N/A

¹⁴ D. 21-06-015 at OP 181.

¹⁵ Budget amount is the authorized for the three Southern IOUs minus the transition budget allocated to the respective ESA Main for in-unit & ESA CAM for Common Area treatments outlined in AL 4115-E/3144-G.

¹⁶ Southern MFWB Program was open for Customer Enrollment July 2023.

¹⁷ Each IOU is responsible for reporting activities in respective service territory.

Pilot Plus/Pilot Deep Summary

The ESA Pilot Plus and Pilot Deep Program (Pilot or ESA Whole Home) was established to yield deeper home energy savings with energy savings targets expected between 5% to 50%. The Pilot provides more advanced energy savings measures tailored to customer needs that complement and build upon the Main ESA Program measure packages. The Pilot Plus package provides/replaces certain equipment and appliances plug load shifting and electrification measures intended to reduce annual energy usage by 5 to 15%. The Pilot Deep package offers more advanced measures including HVAC, appliances, and hot water measures that aim to reduce annual energy usage by 15 to 50%.

Ordering Paragraph 42 of D.21-06-015 ordered the IOUs to launch the Pilot the beginning of the third quarter of 2022. Due to an insufficient number of responsive proposals from the first RFP event in Q1 – Q2 2022, SDG&E was granted an extension of time to meet the requirements necessary for launching the Pilot. The subsequent RFP was revised as Pilot Plus and Pilot Deep 2.0 and issued in Q4 of 2022. SDG&E was again unable to find a qualified bidder and reported same to Energy Division in March 2023. Pursuant to OP 107 of D.21-06-015, on May 9, 2023, SDG&E submitted AL 4223-E/3196-G, requesting to modify the solicitation requirements from an open competitive bidding process to sole sourcing. Additionally, on May 31, 2023, SDG&E submitted a second extension of time request to comply with OP 42 and Attachment 2 of D.21-06-015 to move the Pilot launch from the end of second quarter of 2023 to no later than the first quarter of 2024. Approval was granted on June 8, 2023.

On August 11, 2023, SDG&E selected a qualified implementer. Contract negotiations continued through the end of October 2023 and a contract was executed on January 9, 2024. The authorized Pilot cycle budget is \$7,633,415, with an estimated annual allocation of \$1,526,683. Due to the challenges in identifying a Pilot implementer, all expenditure charges in 2023 have

been administrative charges totaling \$100,821 (3%). Funds not expended in previous program years will be available for the Pilot throughout the program cycle.¹⁸ The Pilot summary table below reflects costs associated with the administrative activities in support of the pilot implementation in 2023.

ESA Table 1.1.1.5 ESA Pilot Plus and Pilot Deep Program Summary			
	2023 Authorized Budget / Forecasted Planning Assumptions	2023 Actual	%
Budget ¹⁹	\$2,925,686	\$100,821	3%
Administrative Budget ²⁰	\$292,586	\$100,821	34%
Homes Treated	N/A	N/A	N/A
kWh Saved (Plus = 5-15 Percent)	N/A	N/A	N/A
kWh Saved (Deep = 15-50 Percent)	N/A	N/A	N/A
kW Demand Reduced	N/A	N/A	N/A
Therms Saved (Plus = 5-15 Percent)	N/A	N/A	N/A
Therms Saved (Deep = 15-50 Percent)	N/A	N/A	N/A
GHG Emissions Reduced (Tons)	N/A	N/A	N/A

Provide narrative summary of SASH/MASH budget augmentation regarding where funds were used in the ESA Program.

In 2022, both the Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) programs sunset in SDG&E’s service territory. Consistent

¹⁸ D.21-06-015 at OP 181.

¹⁹ Budget authorized of \$1,526,683 in 2023 per D.21-06-015, Attachment 2, adjusted for 2022 Annual Report unspent funds of \$1,399,003.

²⁰ Attachment 2 of D.21-06-015 states “General Administration – Funds may be allocated for administration of the pilot, not to exceed 10 percent of the pilot budget.”

with OP 12 of D.15-01-027, any remaining unspent and unencumbered SASH/MASH program funds should be used for measures in low-income energy efficiency programs in residential housing that benefit ratepayers. On October 31, 2023, SDG&E submitted AL 4285-E²¹ requesting transfer of unspent SASH/MASH funds to the ESA programs.²² The transferred funds will be used primarily to support the Main ESA Program implementation across the current program cycle, including to provide energy efficiency measures and services to single family, mobile homeowners, and renters at no cost to qualifying low-income customers. SDG&E also sought flexibility to utilize the SASH and MASH funds across energy efficiency budget categories and other ESA programs and pilots like the MFWB Program and Pilot Plus/Pilot Deep Program. The AL 4285-E was approved by the Energy Division and became effective on November 30, 2023. As of year-end 2023, SDG&E had not used these funds to supplement Main ESA Program implementation.

ESA Table 1.1.1.6 2023 SASH and MASH Unspent Funds (Electric IOUs Only)			
	2023 Authorized Budget	2023 Actual	%
Budget	\$315,260	0	0%

²¹ See SDG&E AL 4285-E accepted and effective November 30, 2023, available at https://tariff.sdge.com/tm2/pdf/submittals/ELEC_4285-E.pdf.

²² SDG&E requested authorization to transfer the funds from the SDG&E California Solar Initiative Balancing Account (CSIBA) to SDG&E's ESA Core Balancing Account, in which cost of the measures and installations are currently recorded. SDG&E's ESA Program Balancing Account is the Low Income Energy Efficiency - Electric (LIEEBA).

1.1 Marketing, Education, and Outreach (ME&O) Provide a summary of the segmentation strategy employed, (i.e., tools and analysis used to segment households and prioritized for treatment, and how this information is communicated to the contractor/ Community Based Organizations (CBO)).

Customer research and segmentation enables SDG&E to target customers and gain insights into barriers and solutions while organizing the residential population into specific segments. Categorization may include energy-related attitudes and behaviors, including demographics, energy conservation behaviors, media consumption habits, lifestyle preferences, mobile usage, propensity to engage, and more.²³

SDG&E uses a variety of factors to identify customers who are likely to qualify for the ESA Program, which included the most current Athens Research Study²⁴ and SDG&E's Residential Segmentation model. The purpose of this model was to modernize SDG&E's residential customer segments to account for market changes and ever-changing customer dynamics. This segmentation allowed for targeted messaging to customers with high potential for eligibility. As discussed in further detail herein, a series of communication tactics such as direct mail and outbound calling were deployed to potentially eligible customers.

An example of SDG&E's multi-touch integrated approach is the 2023 ESA Program targeted marketing campaign. SDG&E sent over 146,500 emails to currently enrolled and potentially eligible CARE and FERA customers, encouraging them to enroll in the ESA Program, where applicable. Following the email and/or postcard, SDG&E provided a canvassing list to ESA Program outreach contractors with ESA Program penetration rates and PRIZM code information for each zip code. PRIZM codes are third party-generated customer

²³ Customer segmentation from a marketing demographic perspective.

²⁴ Compliance Filing of PG&E, SoCalGas, SDG&E, and SCE Regarding Annual Estimates of CARE Eligible Customers and Related Information, submitted on April 13, 2023, *see* Attachments B and C, *available at* <https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M506/K170/506170304.PDF>.

segments based on socioeconomic data. See Appendix C, attached hereto, for a sample of this email campaign.

In August 2023, in collaboration with RHA, SDG&E launched a new customer interest form and an online home energy audit/survey that identified specific household energy needs prior to ESA Program enrollment. The online home energy audit/survey facilitates a more streamlined approach to SDG&E's engagement, focusing on customer segments with the highest need. This interest form and an online home energy audit/survey streamlines the customer journey and immediately sends customer information to outreach contractors. Over 16,000 customers viewed the online interest form, resulting in over 3,100 submissions and 226 appointments scheduled.

SDG&E continued its collaboration with the Energy Solutions Partner Network, which consists of more than 200 Community Based Organizations (CBOs) who help educate and enroll customers in low income programs utilizing a variety of tactics including, messaging through email and social media channels, posting information on their websites, providing booth space at events, and hosting enrollment day fairs at their locations. In 2023, the Energy Solutions Partner Network leveraged both traditional messaging (e-mail, newsletters) and social media platforms (Facebook, X, Instagram, Nextdoor, etc.) to effectively deliver tailored SDG&E program messaging to customers from organizations they trust.

Additionally, SDG&E strategically identified CBOs within and outside of its Energy Solutions Partner Network to further reach areas and various pockets within low-income populations throughout its service territory. These areas include hard-to-reach rural, multi-cultural, multi-lingual, and Access and Functional Needs (AFN) communities. SDG&E also coordinated outreach tactics with CBOs to promote the CARE, FERA, and ESA Programs to customers, which can deepen customer trust in the utility and create more enrollment

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

SDG&E also collaborated with these partners to provide education and engagement opportunities at approximately 543 presentations and events throughout its service territory. To further support customers at events in multicultural/multilingual communities, SDG&E secured bilingual representatives to communicate effectively with non-English speaking customers, who are often part of SDG&E's hardest-to-reach populations. The ability for CBOs to penetrate these harder-to-reach customer segments continues to be valuable in generating program enrollments.

RHA initiated a targeted marketing campaign designed to appeal to customers with specific demographic, financial, geographic, and health-related factors. They collaborated with the Programs subcontractors, trade allies and attended MF Tradeshow to generate leads and enrollments for the Program. Moreover, RHA and SDG&E's Program Advisor jointly managed the marketing endeavors, receiving essential support and coordination from the Southern IOU Single Point of Contacts (SPOC) from SDG&E, SoCalGas, and SCE. The SPOCs played a critical role in identifying prospects and providing leads. The combined efforts of the IOU SPOCs contributed 14% of the total 791 leads in the programs pipeline. For further details, please refer to Section 1.5.1 in the SPOC section. As part of the effort to identify and prospect leads for the Multifamily Energy Savings (MFES) program, SDG&E's SPOC collaborated with Residential Intelligence (Res-Intel) to conduct a refresh of the multifamily market study previously completed in 2020. This refreshment of the multifamily market assisted the SPOC in designing and implementing targeted and segmented marketing campaigns and outreach

activities. More details about the project and benefits can be found in the multifamily section 1.12.2, below.

1.2.2 Provide summary of how customers are targeted/referred to implementation Pilots (Pilot Plus and Pilot Deep and Building Electrification)

SDG&E' ESA Pilot Plus and Pilot Deep program (Pilot) launched in the first quarter of 2024, therefore SDG&E was unable to serve customers in 2023. To achieve the necessary savings as directed in D.21-06-015,²⁵ the customers targeted for participation in the Pilot will be single family, mobile home low income, high usage customers defined as CARE or FERA customers who have either exceeded the electric usage reached 300% of baseline and/or, gas usage reached 200% of baseline 3 or more times within the prior 12 months. In addition, the targeted customer segment for this Pilot will be in climate zones 10, 14, and 15. These climate zones are part of SDG&E's inland, mountain, and desert areas which can experience greater temperature swings. More than 70% of homes in these climate zones are 30 years or older and they are typically less efficient, making deeper energy savings possibly achievable here.

1.2.3 Provide a summary of the customer segmentation strategies employed (i.e., tools and analysis used to identify customers based on energy usage, and other factors) and how these customer segments are targeted in program outreach.

In 2023, SDG&E continued to utilize Residential Segmentation data overlaid with the Athens Research Study for the Main ESA program. The Residential Segmentation data are generated by a predictive model which leverages socioeconomic information and consumption behavior to identify key drivers and apply machine learning algorithms to generate predictive scores and identify customers who are likely to be eligible for the programs. The socioeconomic rank includes income, household size, education, occupation and home value, and Life Stage

²⁵ D.21-06-015 at Attachment 2.

Groups and Social Groups. Layering on top of the Residential Segmentation data, at the end of 2023, SDG&E worked closely with RHA to develop criteria for the ideal customer to target customers with the highest potential for savings, which will dictate targeted communications in 2024. In addition to mass market awareness tactics such as TV and bill inserts, SDG&E launched ESA-specific tactics in 2023, which focused on communicating ESA benefits to eligible customers. The campaign ran in English, Spanish, and Asian languages and included TV (PSA-style interviews), digital (including paid search), out-of-home and email. See Appendices B-E of this report for examples.

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

Identification and Outreach

While the Main ESA Program launched in January 2023, it took several months to set up new systems and processes to implement a new single-implementer, savings-based Program. Efforts to strategically identify and engage customers under the new Program model commenced in the latter half of the year. SDG&E developed and refined its approach to identify customers to target based on their likelihood to qualify for the Program, high energy use, and other fields like homeowner status, previous participation, PRIZM code and others to help prioritize engagement efforts. SDG&E initiated a direct marketing email campaign to subsets of these customers each month directing them to complete the new online home energy audit/survey.

The Southern MFWB Program launched in July 2023 under a single-implementer model across the three service territories (SDG&E, SCE & SoCalGas). The Program delivers energy savings to both deed and non-deed restricted properties that meet the income guidelines. For Deed Restricted properties, all measures (both Common Area Measures and in-unit measures) are fully subsidized by the Program. However, for Non-Deed Restricted Properties, there is a

50% copay for Common Area Measures, while in-unit measures remain fully subsidized. The Program initiated with a robust pipeline, comprised of leads from the southern IOUs, referrals from the Programs' ESA subcontractor network and customer leads from the interest form on RHA's website. RHA also participated in the Apartment Owner's Association tradeshow in Long Beach in October 2023, where they secured 25 Program leads. Additionally, the Program was promoted through LinkedIn. The primary focus of the Program is to target whole building enrollments, encompassing both Common Areas and In-Units. Additionally, the Program is integrated with the Southern IOUs' in-house SPOC and leverages leads from the Multifamily Central Portal (MCP) to establish a "true one-stop model" and enhance utilization of all accessible programs and services, including benchmarking and financial services. While RHA is tasked with managing the marketing and outreach endeavors, the IOUs and their SPOCs are crucial contributors, supplying leads to the Program.

Enrollment, Assessment, and Energy Audit

The Main ESA Program online home energy audit/survey, which launched in August 2023, helps to identify specific household energy needs to streamline customer enrollment and assessment in the ESA Program. In Q4 2023, 226 appointments were scheduled with customers that completed the online energy audit/survey.

The Southern MFWB Program consists of three enrollment pathways. Pathway #1 – Individual Household: For customer-initiated projects, subcontractors will assess the potential for a whole-building approach and, if deemed feasible, engage the owner, and encourage more comprehensive building updates. All in-unit services are offered at no cost to the customer. Property owners can enroll tenants to receive in-unit measures without tenants having to separately enroll, if the property owner provides appropriate income eligibility documentation. Pathway #2 – In-Unit and Limited Common Area: Owners interested in significant savings but

not able to commit to a whole-building approach will be offered bundled in-unit measures combined with select common area measures. Program incentives will fund 100% of in-unit and common area project costs for deed-restricted properties. Non-deed-restricted properties will receive no-cost in-unit measures and incentives for 50% of common area project costs. Pathway #3 – Whole Building: This path maximizes energy savings and incentives for the participant through a comprehensive approach that translates energy audit results into a measure package that includes in-unit, common area, and whole building measures – with an emphasis on property-wide lighting, large central systems, and envelope improvements. Contractors will work with customers to guide the highest-energy users and properties with a disproportionately high energy burden toward this pathway.

For both property-level pathways, a no-cost energy audit of the customer's property, delivered in alignment with ASHRAE standards, will be the basis for measures installed by an ESA subcontractor, trade ally, or the Owner's preferred contractor. The audit will identify potential energy efficiency opportunities, benchmark the building, use collected data to analyze the viability and cost-effectiveness of each proposed opportunity and inform the creation of a building treatment plan. Equipped with this document, Energy Advisors will work with the Owner to ensure they receive the maximum Program benefits.

Measure Installation

In pivoting to a new service delivery model, qualified Main ESA Program customers have two options for services: ESA Basic and ESA Basic Plus. ESA Basic customers do not need to provide additional information or documentation to receive products or services, while ESA Basic Plus customers are required to provide additional income documentation to receive products or services. The Main ESA Program Implementer prioritized engagement of customers through the Basic Plus customer pathway for deeper energy savings. While the ESA Basic

offering is described on the ESA Program website and is available, no ESA participants took advantage of the offering in 2023.

The Southern MFWB Program encompasses an extensive range of measures, covering basic, HVAC, water heaters, appliances, lighting, envelope, and electrification measures. However, given the Program's design and emphasis on energy savings, a primary objective is to prioritize properties interested in whole-building enrollment or a combination of in-unit and common area measures to achieve significant energy savings.

Inspections

Under the new program delivery model, the Main ESA and MFWB Program Implementers conduct NGAT and post-installation inspections for all HVAC and Water Heater R&R Services while SDG&E inspects a sample of all work performed. All inspections are required by contract to be conducted according to the California Installation Standards and the Statewide Energy Savings Assistance Program 2021-2026 Cycle Policy and Procedures Manual (v1.2).

1.2.5 Describe Tribal outreach activities, including a summary of the biannual Tribal meetings, and an up-to-date list of Tribal contacts, including progress towards meeting goal for relationships with non-federally recognized tribes.

In 2023, SDG&E's Outreach and Tribal Relations team worked together to engage with the 17 federally recognized tribes within its service territory as part of its ongoing initiative to educate tribal members on available customer assistance programs, eligibility requirements, and other available resources. SDG&E's Tribal Relations team regularly engaged with tribal leaders, staff, and community members to learn and understand the challenges and needs in these communities.²⁶ There are currently no multi-family properties in these communities. Hard-to-

²⁶ D.21-06-015 at 455 directs the IOUs to contact each tribe and/or conduct individual meetings with tribes in their territory at least once every 6 months.

reach areas where tribal members reside continued to be a top priority for SDG&E low-income program outreach. In 2023, SDG&E's Tribal Relations Manager and dedicated Outreach Advisor sent a meeting request to all 17 federally recognized tribes to discuss program offerings. By the end of 2023, SDG&E met with 13 tribes to discuss low-income programs and other customer programs and continues to offer the opportunity to the remaining tribes. SDG&E did not meet with any of the three non-federally recognized tribes. There are ongoing challenges to engage non-federally recognized tribes because they do not own a specific tract of land, nor have funding for dedicated tribal government staff.

In addition to ongoing outreach and engagement efforts with all federally recognized tribes, SDG&E targeted a subset of 7 tribes, based on income eligibility, to provide Customer Assistance training and mini-grant opportunities to further drive awareness and enrollment on these programs. At the end of 2023, SDG&E completed four tribal staff training sessions, hosted twenty-one community resource fairs, and processed two mini grant payments to tribes. Additionally, in its effort to enhance outreach to provide mini grants to additional tribes with eligible customers for Customer Assistance programs, SDG&E began working with Southern California Tribal Chairmen's Association (SCTCA) and Southern California American Indian Resource Center (SCAIR) to identify additional points of contact with the seven tribes identified as being able to support the mini grant request.

In accordance with D.21-06-015, SDG&E confirms that it has an updated list of tribal contacts.

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

Assembly Bill (AB) 793, among other requirements, directed the IOUs to incorporate energy management technologies into the ESA Program measure offerings. The following ESA Program activities were conducted in 2023 related to energy management technologies and costs.

As part of contractor training for the ESA Program, Residential Outreach Specialists are trained on SDG&E's My Account offerings so they can walk customers through the website during the In-Home Education visit. This training ensures that customers are educated on programs and tools available for them to manage their energy, and to benefit from the services offered through My Account. Energy Savings opportunities are also included in the statewide Energy Savings Assistance Program Energy Education booklet, which is reviewed with the customer at the time of the home visit. Additionally, in 2023, the ESA Program leveraged the in-home energy education process to inform customers about the Power Saver Rewards program. In 2023, SDG&E spent \$251,812 in In-Home Energy Education costs.

1.2.7 Managing Energy Use

Outreach & Assessment contractors in the field offer customers energy use management tools and assistance. As mentioned above, during in-home visits, customers are guided through the registration process if not already enrolled in My Account and are provided with educational resources to be utilized for energy management through the My Account tool. Additionally, Residential Outreach Specialists review customers' bills to provide them with information on how to best manage their energy use as they walk through the in-home assessment. For example, when a contractor examines the water heater, they will guide the customer on setting the appropriate water temperature of the water heater to help reduce costs. As part of the installation

of a smart thermostat, ESA contractors educate customers on how to set up the smart thermostat to improve energy usage. In 2023, SDG&E spent \$83,205 on the installation of smart thermostats in income qualified households.

1.2.8 Services to Reduce Energy Bill

To help educate customers on their energy use, customers can complete a no-cost online five-minute Home Energy Checkup through the Ways-to-Save Home Energy Survey, which is available through My Account. By answering a few basic questions on how they use energy, the survey can help identify ways in which their home can be more energy efficient. The customized tips range from conservation to no-or-low-cost upgrades to long-term solutions that help reduce energy use and save money.

1.3 Energy Savings Assistance Program Customer Enrollment

1.3.1 Report the number of customers or households treated, the IOU specific 2023 household treatment target, and the percentage of households treated. If the IOU was not able to reach the total household target, please explain.

SDG&E's household treatment target for 2023 was 11,711. SDG&E treated a total of 4,533, or 39% of the target. The homes treated target was not reached in 2023 due to longer than anticipated ramp up activities and challenges for both the Main ESA Program and Southern MFWB Program described earlier in the report. SDG&E treated 3,408 single family, 901 mobile home treatments and 224 MF in-unit treatments, which were completed prior to the transition to the launch of the Southern MFWB Program on July 1, 2023.

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

In 2023, SDG&E continued to utilize categorical eligibility and self-certification to streamline enrollment efforts for the ESA Program. Categorical eligibility based on qualifying programs is used to simplify the enrollment income verification and data collection process for

customer enrollment. SDG&E also continued its targeted self-certification enrollment strategies (based on PRIZM codes) to conduct target marketing campaigns and canvassing efforts for CARE and FERA qualified households.

In August of 2023, SDG&E launched an online customer interest form, which includes questions designed to inform program implementers regarding a home's energy savings potential. The online interest form is a new strategy intended to help streamline customer enrollment in support of achieving energy savings goals.

1.3.3 If the IOU failed to meet its annual energy savings goal, please explain why it was not met. Explain the programmatic modifications that will be implemented in order to accomplish future annual energy savings goals.

In D.21-06-015, the Commission directed the utilities to transition from the previous programmatic goal of number of homes treated to energy savings achieved.²⁷ SDG&E is not currently meeting program cycle energy savings goals due to a longer than anticipated ramp up for both the Main ESA and the Southern MFWB program. While both programs launched on time, avoiding a gap in offerings, both programs experienced challenges pivoting to an energy savings focused approach. While the teams worked to stand up new systems and processes to support revised requirements and program design features, the Main ESA Program was further constrained in the early months of 2023 by having to repeat a solicitation process for its HVAC and Water Heater R&R Services due to lack of qualified bidders, and needing to address a backlog of 2022 appliance deliveries when a vendor unexpectedly went out of business. Similarly, the progress of Southern MFWB program implementation activities were stalled as unanticipated challenges took time to assess and mitigate. These challenges and their respective resolutions are detailed in MFWB Program Summary, Section 1.1 of this report.

²⁷ D.21-06-015 at OPs 56 and 57.

SDG&E notes that catching up to its program cycle energy savings goals will be a significant challenge. Looking ahead, SDG&E, in collaboration with RHA, will be taking a strategic approach toward achieving its program cycle energy savings goals by:

- Refining customer outreach efforts to identify and engage a narrower pool of customers with higher energy savings potential and likelihood to qualify for the program,
- Regular review of energy savings measures for potential modifications to improve program level energy savings and cost-effectiveness,
- Leveraging program performance metrics to develop and deploy contractor implementation activities to increase savings, such as identifying opportunities to increase or decrease measure installations in support of energy savings and cost effectiveness, and
- Filling vacancies and developing the skills of the existing RHA workforce.

In compliance with D.21-06-015, SDG&E included implementer compensation models in its contracts that are directly tied to achieving energy savings for SDG&E's Main ESA Program and the Southern MFWB program, ensuring RHA and its subcontractors are incentivized to maximize energy savings, pursuant to the goals set forth by the Commission.

1.4 Disability Enrollment Efforts

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

In 2023, SDG&E conducted outreach efforts with organizations serving individuals with a disability (listed below) or other AFN to improve ESA Program engagement. Throughout the year, SDG&E partnered with these organizations in more than 500 events and presentations reaching over 90,000 customers. These events and presentations were provided to CBO staff and volunteers, so they could assist community members that utilize their services. Additional information about these community organizations and SDG&E's joint outreach efforts can be found in Section 1.4.2 below. SDG&E partnered with the following organizations to better reach customers with a disability or other AFN:

211 Orange County	Meals on Wheels San Diego County
211 San Diego	Metropolitan Area Advisory Committee (MAAC)
Access to Independence	Mitchell Thorp Foundation
Access Youth Academy	Neighborhood House Association (NHA)
Adjoin	North County Health Project, Inc.
American Red Cross WIC	Paralyzed Veterans of America, Cal-Diego Chapter
Asian Culture and Media Alliance	Peninsula Shephard Center
Black American Political Association of California (BAPAC)	Persian Cultural Center
Brazilian Institute for Arts and Culture - BIAC	Ramona Senior Center
Chula Vista Chamber of Commerce	Resounding Joy
Chula Vista Community Collaborative (CVCC)	Ride Above Disability Therapeutic Riding Center
City of San Marcos Senior Activity Center	San Diego Center for the Blind and Vision Impaired
Cool Zones-County of San Diego	San Diego Council on Literacy
CREER Comunidad Y Familia	San Diego County HHSA - Health and Human Services Agency
Cystic Fibrosis Foundation	San Diego Futures Foundation
Deaf Community Services	San Diego Hunger Coalition
Diabetes Research Connection	San Diego Regional Center
D'Vine Path	San Diego Regional East County Chamber of Commerce
ElderHelp of San Diego	San Diego Seniors Community Foundation
Epilepsy Foundation of San Diego	San Diego State (SDSU) Research Foundation
Fallbrook Senior Center	San Diego Unified School District - Cesar Chavez Elementary
Family Assistance Ministries	San Ysidro Health Center
Feeding San Diego	San Ysidro Health Center WIC - Chula Vista
Foundation For Senior Care	Silent Voices
GRID Alternatives San Diego	Somali Family Service of San Diego
Hearts and Hands Working Together	South Bay Unified School District - SunnySlope Elementary
Helping Paws Foundation	Southern Caregiver Resource Center
Home Start Incf	Southwestern College Foundation
Horn of Africa Community	St. Madeleine Sophie's Center
House of Italy San Diego	Support The Enlisted Project (STEP)

House Of Peru	The Arc of San Diego
Julian Cuyamaca Resource Center, Inc.	The San Diego Chinese Historical Society and Museum
Kalusugan + Kalakasan Center for Health & Wellness	Thrive Lemon Grove
La Jolla Community Center	Tricity Food Pantry
La Maestra Community Health Centers	Valley Center CERT/ Valley Center ARC
Laguna Niguel Family YMCA	Vista Community Clinic

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

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

San Diego Center for the Blind and Vision Impaired

San Diego Center for the Blind and Vision Impaired promoted SDG&E's energy solutions and services that include Low Income and Medical Baseline programs in English and Spanish. A series of presentations on SDG&E programs and services including Customer Assistance Programs and Public Safety Power Shutoff (PSPS) was given to multiple constituent groups of San Diego Center for the Blind and Vision Impaired.

Deaf Community Services

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

(ASL) interpretation for internal and external events with SDG&E and has an active Service Agreement to provide ASL interpreting services for key external events and customer notifications.

Mental & Health & Services

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

Senior Centers

Outreach Advisors conducted presentations to Senior Centers throughout San Diego, including Alzheimer's Association, Backcountry Communities Thriving, Bayside Community Center, ElderHelp of San Diego, Ramona Senior Center, and others, with information on SDG&E's Customer Assistance Programs and offerings. Monthly messages were posted through the partners various social media channels.

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

SDG&E's ME&O communications are designed to specifically address the needs of individuals with an AFN, as detailed above. For customers who are blind/low vision, SDG&E has provided large-font printed collateral materials and large-font customer bills upon request. These resources are available at sdge.com/AFN and sdge.com/accessibility page, which is a dedicated landing page for AFN customers.

Through SDG&E's Energy Solutions Partner Network, SDG&E can provide customized messaging through email, e-blasts, newsletters, social media posts on Facebook, X, and Instagram, as well as at events, workshops, and trainings with each organization's staff. These

efforts led to 6.7% of SDG&E's ESA Program enrollments being identified as customers with disabilities in 2023.

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

In 2023, SDG&E's enrollment numbers from individuals who are disabled totaled 6.7% of the goal. The percentage reflects the number of customers who have self-identified as disabled, are participants of Medical Baseline, or who have been identified during the enrollment process. The challenge with reaching this goal is in part because of the limitations in how identification of a customer who is disabled occurs during the ESA enrollment process. Customers are not required to provide disability status and are sometimes hesitant to voluntarily disclose this information. Contractors are reliant on customers to provide disability status or visual indicators, which are not always apparent. For additional details regarding enrollment of customers who are disabled and those with other access and functional needs please see Appendix G, ESA Program - Table 16 – ESA Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions

Throughout 2023, SDG&E continued to partner with local organizations serving customers with disabilities and other access and functional needs. These organizations included 211 San Diego, Deaf Community Services, and others to increase enrollments within SDG&E's service territory. In addition to leveraging existing partnerships, in 2023, SDG&E Outreach proactively added 11 CBOs to further support and reach individuals with an access and functional need.

1.5 Leveraging Success, Including LIHEAP

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

As previously mentioned, SDG&E works closely with a network of approximately 200 CBOs to connect customers with programs and solutions related to Customer Assistance, bill payment resources, energy conservation, Public Safety Power Shutoffs, resiliency, and wildfire preparedness. Some of these partners include 211 San Diego, Community Resource Centers, Women, Infants and Children (WIC) and similar agencies. As part of the intake process, 211 San Diego enrolls eligible customers in CARE or FERA and generates leads to the ESA Program. Approximately 2,200 leads and 60 customer enrollments were generated through SDG&E's partnership efforts in 2023.

Additionally, SDG&E's MF SPOC conducted targeted outreach to MF property owners and managers by establishing connections within the non-profit affordable housing organizations. With these connections, the MF SPOC was able to refer 82 properties to ESA MFWB program and 70 properties to ESA. The SPOC worked with a CBO to reach tenants of MF properties in a hard-to-reach community. The SPOC collaborated with the Chaldean Community Council's Chaldean Radio to broadcast a video announcement of the Multifamily Energy Savings program on their Facebook page resulting in 1,600 views. The SPOC has made multiple visits to the CCC office to meet customers and build a strong relationship with the Chaldean Community. This relationship allows the SPOC to provide program updates and leverage multiple programs for the community.

SDG&E's SPOC established a relationship with the City of Chula Vista and participated in the Chula Vista Benchmarking and Beyond event in October 2023. The SPOC presented information on the MFES to property owners and managers in attendance. The SPOC

established a relationship with a local nonprofit organization and a property management company which resulted in 10 multifamily whole building property leads and 5 in unit leads for the MFES program. The SPOC continued to build relationships with organizations, property owners and managers, and tenants resulting in 403 property referrals to the MFWB program.

SDG&E also partners with the Disadvantaged Communities Single-family Affordable Solar Homes (DAC-SASH) Program Administrator, currently GRID Alternatives, to initiate leveraging efforts with the DAC-SASH program. This effort includes annual data sharing effort of ESA single-family enrollments for households that exceed 400% of baseline as part of the CARE Program high usage process.

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

SDG&E's robust network of local agency partnerships helped the utility promote programs and services offered quickly and efficiently to customers in need. Partnerships with organizations such as 211 San Diego also helped streamline the enrollment processes for the programs and increased the ability of customers to receive comprehensive services, from payment assistance to ESA Program measure installation, providing for a simplified customer experience.

In support of California Emerging Technology Fund's (CETF) efforts to provide eligible Californians with affordable internet services, SDG&E provides customers visiting SDG&E's website with a link to The Affordable Connectivity Program (ACP) program website. In January 2023, CETF reached out to SDG&E to update the website link and to begin discussion on leveraging efforts for 2023. SDG&E and CETF met on March 15, 2023, to discuss new opportunities to provide customers with information on affordable broadband. During this meeting, SDG&E and CETF had the opportunity to review 2022 achievements and discuss next

steps to continue effective engagement through its ME&O channels. Additionally, SDG&E added CETF information in its Cool Zone Program brochure, which is distributed to customers at more than 100 Cool Zone locations throughout the service territory during the high heat months of June through October.

In June 2023, CETF presented ACP program information in a mid-year CBO webinar. On October 25, 2023, SDG&E met with CETF to review year-to-date progress on CETF program marketing, education, and outreach efforts. This was the last quarterly meeting of 2023. On November 3, 2023, SDG&E participated in the CETF meeting with the other IOUs to discuss acceleration of enrollment in the ACP. Each IOU had the opportunity to present their YTD accomplishments in support of the ACP, which included highlights on SDG&E's Marketing and Outreach tactics as well as ACP promotion through the ESA program. Additionally, the IOUs shared lessons learned and suggestions with the CETF team to further promote ACP in 2024, including a recommendation on dedicated social media toolkits for each IOU to share through their respective social channels.

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

As part of the transition to the implementer model, SDG&E ceased contracting directly with local Low Income Home Energy Assistance Program (LIHEAP) agencies. In turn, RHA is subcontracting with both San Diego LIHEAP contractors, MAAC and Campesinos Unidos, to continue leveraging enrollment efforts. In 2023, RHA implemented processes to streamline referrals from these LIHEAP agencies to the ESA Program.

As part of the long-standing partnerships with local LIHEAP payment assistance agencies, SDG&E continued leveraging efforts with LIHEAP organizations to support non-IOU fuel customers by offering various payment assistance programs available and maximizing

measures offered through the ESA Program and LIHEAP. This partnership also allows for the installation of measures to renters that may not be available through the ESA Program.

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

In 2023, SDG&E and the San Diego County Water Authority (SDCWA) met to discuss opportunities for continued leveraging activities. While SDG&E and SDCWA did not leverage any measure installations as in previous years, SDG&E supported efforts to market program materials through ESA Program energy education. SDG&E and SDCWA will be exploring opportunities for expanded efforts in early 2024. SDG&E included Low Income Household Water Assistance Program (LIHWAP) messaging on bill inserts, the assistance website and branch office digital boards.

1.6 Integration Success

1.6.1 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the California Alternate Rates for Energy (CARE) Program.

SDG&E's online joint CARE/FERA Application is a leveraging tool for the ESA Program, creating ESA Program leads when a customer applies for CARE/FERA. Contractors are assigned program leads for customer follow-up. In 2023, more than 22,300 leads were generated through the joint online internet application leveraging efforts, and approximately 1,492 customers were enrolled. Customers enrolling in ESA, but not previously on CARE or FERA, can sign up for the CARE or FERA Program through the ESA Program agreement forms.

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

Within the residential energy efficiency (EE) portfolio, SDG&E attempts to minimize confusion that property owners/managers may have regarding various program participation and eligibility requirements through the MF SPOC. The MF SPOC approach was authorized in

D.16-11-022 to provide a one-stop shop for MF property owners and managers²⁸ and was subsequently updated in D.21-06-015²⁹ to additionally offer benchmarking and financial services. The MF SPOC continued to leverage leads to SOMAH, ESA, and ESA CAM, in addition to evaluating multifamily properties. The MF SPOC also offered On-Bill Financing (OBF) and Benchmarking services during customer touchpoints, as well as SDG&E's Residential Zero Net Energy Transformation (RZNET) Program.

The MF SPOC coordinates all common area and in-unit enrollments across low income and energy efficiency programs, thus creating a seamless and comprehensive whole building approach for the participant. The MF SPOC approach also allows for better visibility and identification of areas for refinements in the programs to improve property owner/manager satisfaction. In cases where a property does not qualify for ESA programs, the SPOC's knowledge of programs or incentives and a customer's project needs allow the SPOC to refer customers to other programs. The SPOC continues to strengthen cross-departmental relationships, communication, and strategies to ensure customers receive a comprehensive and streamlined experience.

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

There were no efforts or collaborations with Energy Efficiency Government Partnerships Programs in 2023. However, the MF SPOC collaborated with the City of Chula Vista to outreach to the community about ESA and the ESA MFES programs. See section 1.5.1 describing the relationship with the City of Chula Vista.

²⁸ D.16-11-022 at OP 45.

²⁹ D.21-06-015 at OP 130.

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

ESA program staff continue to collaborate with the EE team through the SPOC model. The SPOC coordinates EE program access for customers to simplify the process and minimize confusion of programs. In cases where a multifamily property does not qualify for the ESA program, the SPOC can leverage residential EE programs including the Residential Zero Net Energy Transformation (RZNET) Program or non-residential programs such as the Comprehensive Energy Management Solutions (CEMS) Program.

1.6.5 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Demand Response programs, including successes in Air Conditioning Cycling or other Demand Response programs, and the new Summer Reliability programs from D.21-12-015.

To ensure that ESA program contractors are knowledgeable in both energy efficiency and Demand Response (DR) offerings, ESA Program management communicated the latest DR program eligibility guidelines, enrollment details, and benefits of participating to its implementer. The Main ESA Program leveraged the in-home energy education process to inform customers about the Power Saver Rewards program including leaving a program flyer with the customer. As a result, in 2023, SDG&E installed 315 smart thermostats, totaling \$83,205 in program costs.

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

The California Solar Initiative (CSI) Programs include the CSI General Market Program, Single-family SASH Program, MASH Program, and the CSI-Thermal Program. The CSI General Market closed December 31, 2016, and SASH and MASH closed effective November

30, 2023.³⁰ CSI Thermal closed to new applications on July 31, 2020, and the program is in the process of ramping down. There is not a final closure date for CSI Thermal as projects are still being completed. The CSI Thermal program does not have any coordination with the ESA program. Outside of CSI, the DAC-SASH Solar on Multifamily Affordable Housing (SOMAH) programs are more recent offerings that provide customers with incentives for solar systems.

Pursuant to OP 43 of D.21-06-015, on November 9, 2023, the IOUs held the third annual Clean Energy Workshop, providing interested stakeholders with an opportunity to review updated program information and continue the discussion on collaboration and leveraging opportunities between the low income and clean energy programs. The overall objectives of the Clean Energy Workshop were to:

- Create connections and foster opportunities for relationship development and networking across California’s income-qualified and clean energy program administrator community.
- Provide program administrators with information on initiatives and programs along with approaches for customer engagement, increasing participation and enabling program collaboration.
- Discuss barriers, lessons learned and shared successes to building program partnerships and customer involvement.
- Highlight successful program coordination that could be modeled and/or expanded.

As a result of the Workshop, key areas of priority requiring further consideration were identified. Areas of priority included:

- Consistency in determining bill impacts across programs,
- importance of leveraging remediation funding to expand program opportunities,
- importance of targeting the right customers,
- improved collaboration between programs to minimize communications and confusion,
- identifying the appropriate metrics, given the differing goals across programs
- improving property owner engagement
- SPOC/Coaching, and
- early education opportunities/financial literacy.

³⁰ SDG&E AL 4285-E accepted and effective November 30, 2023, *available at* https://tariff.sdge.com/tm2/pdf/submittals/ELEC_4285-E.pdf.

As next steps, the IOUs suggested leveraging the ESA Working group meetings as an opportunity to provide updates on relevant activities. Additionally, the IOUs will utilize the next workshop to address any lessons learned, recommendations, or actions taken to address these areas of priority.³¹

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

As stated above, the SASH and MASH programs are closed. DAC-SASH and SOMAH are more recent solar incentive programs. Pursuant to OP 2 of D.20-12-003, SDG&E entered into a non-disclosure agreement (NDA) with GRID Alternatives, the implementer of DAC-SASH, to share customer data. D.20-12-003 required the electric utilities to provide GRID Alternatives with an annual data set of customers profiles to support marketing and outreach efforts for the DAC-SASH program. The customer profiles are specific to ESA program participants identified as residing in single-family, owner-occupied homes within a disadvantaged community. In 2023, SDG&E provided 200 leads to GRID Alternatives in compliance with D.20-12-003.

SDG&E and GRID Alternatives established recurring quarterly and ad hoc meetings to discuss process improvements and ways to increase leveraging opportunities. Additionally, GRID provided SDG&E with ESA leads received from the program. In Q2 and Q3 of 2023, SDG&E received 2 batches of leads from GRID resulting in a total of 43 leads. Due to enrollment system maintenance, the DAC-SASH ESA leads were inadvertently deleted resulting in zero enrollments. These DAC-SASH ESA leads were resubmitted to RHA in Q1 of 2024 to

³¹ See Income-Qualified and Clean Energy Programs Workshop Summary Report (November 9, 2023), available at <https://pda.energydataweb.com/#!/documents/3878/view>.

ensure that all leads have the potential to become enrollments. Any enrollments will be reported out in the monthly reports for 2024.

SDG&E also continued efforts to leverage GRID Alternative leads for the purposes of enrolling customers into the FERA Program. In 2023, SDG&E enrolled one customer through this effort.

SDG&E also collaborated with Center for Sustainable Energy (CSE) to send customer leads, based on SOMAH participation, to participate in ESA Programs resulting in 12 leads received from CSE in 2023.

Pursuant to Resolution (Res.) E-4987, the SOMAH program requires³² SDG&E to respond to recurring data requests from the Center for Sustainable Energy (CSE) which includes an annual data request to provide CSE with a renewed list of potentially eligible electric customers. The purpose of the annual data request is to streamline the program's marketing efforts. This step allows CSE to verify that the PV systems are being sized correctly, and the Virtual Net Energy Metering (VNEM) bill credits are being allocated appropriately to property tenants and common area meters. In addition to the annual data request mentioned above, CSE also submits data requests for all addresses and meters associated with a SOMAH application as part of their annual reporting.

1.6.8 Report annually the number of participation referrals provided to other PAs and the number of leads they successfully acted on by program type.

For annual report results, please see ESA Table 13B (Clean Energy Referral, Leveraging, and Coordination) in Appendix G.

³² Res. E-4987 at Appendix B.

1.7 Workforce Education & Training

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

In 2023, SDG&E's Workforce, Education, and Training (WE&T) continued to offer on-demand, online classes. In 2023, SDG&E transitioned WE&T to RHA, the primary implementer, who has a robust training platform used for hiring, coupled with structured training programs to equip employees, including subcontractors, with the latest industry insights and best practices. This approach is different than in prior years, where SDG&E directly provided contractors with information about WE&T opportunities. In 2023, RHA held a hands-on training session to get its weatherization installers more comfortable with smart thermostat installations. Also with the new single implementer model, RHA Field Supervisors conduct regular Quality Assurance (QA) ride-alongs with measure installation crews which serve to provide on-the-job training support and to identify workforce training needs.

Additionally, in 2023, RHA took several steps to attract and retain workers including increasing pay-for-performance incentives and adjusting its employee onboarding process to give new hires certain field work experience earlier in the training process. RHA continued to promote employment opportunities to local communities it serves by leaving a flyer with customers that includes a QR code to an online job application.

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

A description of the training conducted in 2023 can be found in section 1.7.1 above. Additionally, SDG&E contractors utilize various business development organizations as part of recruitment and hiring efforts. San Diego Workforce Partnership, San Diego Health and Human Services, and San Diego Community College are some of the organizations utilized to find

workforce resources for the ESA Program. As mentioned above, RHA provided employment information to the low-income community during outreach in the local communities.

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

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

Starting in 2023, SDG&E required RHA and HVAC and Water Heater R&R Services contractors to commit to providing career pathways to disadvantaged workers. As a result, 81 percent of incentive dollars spent on ESA Program contracts include commitments to providing career pathways to disadvantaged workers.

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

CWRs are administered as a statewide program, with PG&E serving as the contract holder and lead IOU. Metrics are tracked collectively for the IOUs at the statewide level. In 2023, RHA, SDG&E’s Main ESA and MFWB Implementer, met with PG&E to discuss CWR opportunities for ESA Program contractor employees.

In 2023, 381 participants enrolled in training through the CWR program, with 261 participants who completed training being placed in jobs using EE skills, and 133 having been employed for 12 months after receiving training. Many students are still actively involved in training and therefore have not yet been placed in jobs.

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

For SDG&E’s local WE&T program, the percent of total WE&T training program participants that meet the definition of disadvantaged worker is reported in Table T-10 BP

Metrics of SDG&E's 2023 Energy Efficiency Annual Report, being filed/served on May 1, 2024, in R.13-11-005.

1.8 Studies

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

2025 Low Income Needs Assessment (LINA)

Public Utilities (P.U.) Code Section 382 requires a Low Income Needs Assessment (LINA) to be conducted by the Commission with the assistance of the Low Income Oversight Board (LIOB,) every three years. Scope planning for the 2025 LINA began in early 2023. The LIOB Needs Assessment Subcommittee met with ED and IOU staff to discuss potential topics for the study in March 2023. Among a list of potential topics, the characterization of high and low energy-using low-income households was selected, with the objective of providing recommendations on how the ESA program can best serve these customers.

In May 2023, the LIOB Needs Assessment Subcommittee and stakeholders met to share the research topic and the high-level scope of work. As the IOU contract lead, SoCalGas issued an RFP in June 2023, and solicitation activities progressed for the rest of the year. Evergreen Economics was selected as the third-party evaluator to conduct this study through the competitive solicitation process. The study commenced in January 2024 and is expected to be completed by the end of 2025.

Non-energy Impacts (NEIs) Study

In Q4 2023, SCE held a competitive solicitation for the Non-Energy Impacts (NEIs) statewide. Evergreen Economics was selected as the primary consultant to conduct the study. The primary objective of the NEIs Study is to assess and quantify health, comfort, and safety

impacts resulting from ESA program treatments. The project commenced in February 2024, and the study is expected to be completed by June 2025.

1.8.2 For studies that concluded in 2023, submit a Final Study Report describing: (1) overview of study; (2) budget spent vs. authorized budget; (3) final results of study; and (4) recommendations.

Categorical Eligibility Study

The Categorical Eligibility Study, authorized in D.21-06-015, began in June 2022 with the selection of Evergreen Economics as the third-party consultant to execute the categorical eligibility study. The final study report was completed and serviced on June 30, 2022. Pursuant to OP 170 of D.21-06-015, the IOUs submitted a joint Tier 2 AL after study completion and a final study report, proposing an updated list of categorical programs for enrollment in the ESA, CARE and/or FERA programs.

(1) Overview of Study

On behalf of the IOUs, SDG&E contracted with Evergreen Economics in June 2022 to review and assess means-tested public assistance programs that could serve to qualify households categorically for the CARE, ESA and FERA programs.

The objectives of this study included:

- Determine the degree of alignment of eligibility requirements of existing categorical eligibility programs with those of the CARE, ESA, and FERA programs;
- Identify other means-tested programs that could serve to ensure categorical eligibility;
- Recommend practical criteria for selection of programs to be used to provide categorical eligibility, and recommend which programs should provide categorical eligibility going forward; and
- Inform potential future auto-enrollment of participants from recommended categorical eligibility programs directly into CARE or FERA by assessing the suitability of auto-enrollment for recommended categorical programs and the steps required to establish auto-enrollment.

An additional task in the study involved assessing the feasibility of automatic enrollment for CARE and FERA using categorical programs.

In July 2022, the IOUs met with Evergreen Economics and the ESA CARE Study Working Group to discuss the study scope of work and to refine the work plan. A draft research plan was presented during a public webinar on August 31, 2022.³³ Comments received during the webinar were incorporated into the final research plan.

In the subsequent months, Evergreen Economics began researching 17 public assistance programs and conducted telephone interviews with representatives of the assistance programs to collect information on their eligibility requirements and application processes. Responses from these interviews were entered into an informational database which were used during the analysis phase of the study. An interim memorandum describing the analysis process and results was provided at the end of October 2022 and shared with the ESA CARE Study Working Group for discussion and feedback.

A draft report was presented initially during a public workshop on May 23, 2023, and subsequently at the LIOB meeting on June 15, 2023. The study was finalized on June 30, 2023. The final study report, public comments on the report, and a database of program characteristics used in the analysis were posted on the Commission's public document website.³⁴ The results of the study were used to inform the Joint IOU advice letter proposing an updated list of categorical programs to be used for ESA and CARE enrollment.³⁵

(2) Budget Spent versus Authorized Budget

³³ The ESA CARE Study Working Group consists of representatives from the IOUs, Energy Division, the Public Advocates Office, Community Housing Opportunities Organization, American Ecos, and The Utility Reform Network.

³⁴ Evergreen Economics, 2022 Categorical Eligibility Study (June 26, 2023) (Evergreen), *available at* <https://pda.energydataweb.com/#!/documents/2814/view>.

³⁵ Advice Letter 4304-E/3240-G submitted October 13, 2023.

The authorized budget for this study was \$150,000.³⁶ The total spent on this study was \$149,960. The costs were split amongst the four IOUs using the following split: PG&E 30%, SCE 30%, SoCalGas 25%, SDG&E 15%.³⁷

(3) Final Results of Study and Recommendations

Evergreen collected data on seventeen third-party assistance programs which were identified by the IOU study team and stakeholders, including the nine statewide programs currently used for categorical eligibility by CARE and ESA.³⁸ A set of criteria was developed to organize and assess the alignment of the programs with the statutory eligibility requirements for CARE and ESA. Criteria for assessment included the unit of eligibility (e.g., individual or household), income eligibility thresholds, other non-income eligibility criteria, duration of program participation, and assurance of eligibility. Each categorical program was then assessed and classified according to the extent they aligned with CARE and ESA eligibility requirements. Table 1.8.2.1 below shows the results by category.

³⁶ D.21-06-015 at OP 170.

³⁷ SDG&E's portion is slightly higher than 15% due to an early payment discount granted on one of the co-funded payments.

³⁸ The nine current programs include the Bureau of Indian Affairs General Assistance, CalFresh (Food Stamps) / SNAP, CalWORKs (TANF) or Tribal TANF, Head Start Income Eligible (Tribal Only), Low-Income Home Energy Assistance Program (LIHEAP), Medicaid/Medi-Cal for Families A & B, National School Lunch Program (NSLP), Supplemental Security Income (SSI), WIC. Additional programs assessed include California Head Start, Lifeline, Children's Health Insurance Plan (CHIP), Housing Choice Voucher Program (Section 8), Supportive Housing for the Elderly (Section 202), California's Military Family Relief Fund (CMFRF), Chafee Foster Care Independence Program (CFCIP), Child Care and Development Block Grant (CCDBG).

Table 1.8.2.1: Study Results and Recommendations by Category

Category	Category Description	Recommendation	Programs
1	Best aligned	Recommended	CalFresh, WIC
2	Next best aligned	Recommended with modest risk	LIHEAP
3	Partially aligned and possibly feasible	Option to use partially if feasible to allow only income qualified	AIAN Head Start, California Head Start, CalWORKS, Lifeline, SSI
4	Partially aligned and less feasible	Not recommended	CHIP, Medi-Cal, NSLP, Section 8, Section 202
5	Least aligned	Not recommended	CMFRF, CFCIP, CCDBG
6	Unable to assess due to lack of information	No recommendation possible	BIA General Assistance

(4) Recommendations

As shown above, Evergreen recommended the IOUs consider retaining both category 1 and category 2 programs as categorical eligibility enrollment options. In addition, they noted that category 3 programs could be partially considered if it were possible to identify participants who qualified based on income and not alternative paths to entry. Evergreen further recommended not using programs in categories 4 and 5 for categorical enrollment as their use would include a significant risk of enrolling non-eligible customers. Furthermore, the study reported that the use of categorical eligibility for FERA would not be practical given 1) FERA's narrow income range for eligibility and 2) none of the third-party programs analyzed use a minimum household size of three individuals as required by FERA.

It is important to note that none of the recommendations in this study preclude any income-eligible household from receiving reduced rates under CARE or energy-saving measures under the ESA program. The elimination of a categorical program does not change any income eligible household's access to CARE or ESA. Households may still apply through self-certification of their income.

Additionally, the study determined that the feasibility of using categorical programs for auto-enrollment into CARE would be feasible but may have limited benefits. For auto-enrollment into FERA, the study reported that none of the programs reviewed would be able to identify potential FERA participants.

1.9 Pilots

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

SDG&E has noted the challenges and activities with regards to its implementation of the ESA Whole Home Pilot. Please refer to Sections 1.1 and 1.2.2.

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

SDG&E did not have any active Pilots for the ESA Program in 2023.

1.10 ESA Working Groups (WG) and Sub-Working Groups (SWG)

1.10.1 Please provide a brief background on each WG and SWG.

D.21-06-015³⁹ approved the formation of the ESA WG, tasked with monitoring and reviewing areas including, but not limited to, mid-cycle issues, energy education, multifamily issues, and the Universal Application System (UAS). Several sub-working groups (SWG) were formed to address these areas, as listed below. Additionally, D.22-12-029 added the CARE/FERA Post Enrollment Verification (PEV) SWG to expand the SWGs from three to four for PY 2023:

- ESA Program Cost-Effectiveness SWG (CE SWG),

³⁹ D.21-06-015 at 413.

- ESA Program Policy and Procedures (PP) and Installation Standards (IS) Manual SWG (PP&IS SWG),
- UAS SWG, and
- CARE/FERA PEV SWG

In addition to the SWGs, an ESA WG Council performed the following functions in 2023:

- Oversaw ESA WG and SWGs,
- Addressed cross-cutting program concerns beyond the ESA program,
- Coordinated activity with ESA/CARE Study Group,
- Managed the Response-to-Recommendation (RTR) process, and
- Managed the Facilitation Team.

The initial ESA WG facilitation team transitioned out of the role in Q4 2023, as a new facilitation team was on-boarded to provide facilitation support, with the current facilitator's budget and contract expiring at the end of 2024.

All ESA WG meeting materials, notes, and actions are posted to the CPUC public site for public access.⁴⁰

1.10.2 What were the accomplishments of each WG and SWG in the 2023 Program Year?

2023 ESA WG:

In 2023, the ESA WG retained seven non-IOU members, comprised of contractors and non-profit organizations. In addition, the ESA WG completed seven statewide public meetings throughout 2023 to engage ESA WG IOUs, non-IOUs member organizations, and the public.

2023 ESA Program Cost-Effectiveness SWG (CE SWG):

From February 2022 to March 2023, the CE SWG met to discuss the cost effectiveness guidelines presented in D.21-06-015.⁴¹ The CE SWG reviewed proposals for modifications to the guidelines and discussed issues related to the cost effectiveness inputs and tests. In March

⁴⁰ ESA WG meeting materials can be found on the California Energy Efficiency Energy Contracts page, available at <https://pda.energydataweb.com/#/> by searching "ESA WG."

⁴¹ D.21-06-015 at 250.

2023, SDG&E, on behalf of the IOUs, served the progress report to all parties on the service list for A.19-11-003, et al.⁴² The CE SWG concluded in PY 2023.

2023 ESA Program Policy and Procedures (PP) and Installation Standards (IS) Manual SWG (PP&IS SWG):

The Policies and Procedures & Installation Standards (PP&IS) SWG continued executing its core function throughout 2023 of incorporating timely updates to the PP&IS manuals to support program implementation. The SWG addressed issues related to the IOUs safety programs, and other contractor related issues. In addition, the sub-working group provided the IOUs with a streamlined mechanism for introducing, retiring, and modifying measures that provides transparency and efficiency in program operations.

2023 UAS SWG:

The UAS SWG concluded in 2022. While the SWG remained terminated in 2023, additional work related to a UAS was carried out by the CPUC, IOUs, and stakeholders via a Concurrent Application System (CAS) WG, convened pursuant to D.23-05-006, and established to develop the design requirement for CAS. In October 2023, the Energy Division concluded CAS WG meetings for CAS Phase 1, and PG&E issued a CAS RFP in December 2023, in accordance with the timeline established in D.23-05-006.⁴³

2023 CARE/FERA PEV SWG:

The CARE/FERA SWG was initiated in February 2023, and met biweekly for six months, with the SWG sunseting by the end of the program year. The SWG was tasked with

⁴² See California Energy Efficiency Energy Contracts, ESA Cost Effectiveness Sub-Working Group Draft Progress Report for Task 1: Cost Effectiveness Test Considerations (March 2023), *available at* <https://pda.energydataweb.com/#!/documents/2783/view>.

⁴³ D.23-05-006 at 2, specifies that the CAS RFP must be released no later than December 29, 2023. And within 220 days after the RFP release, the IOUs must submit a joint Tier 3 Advice Letter seeking approval of the bid selection and executed contract resulting from the CAS RFP, as well as the budget for CAS Phase I development related costs (recorded to date and forecasted through Phase I launch).

exploring a wide range of issues and improvement opportunities related to PEV and recertification processes in the CARE and FERA programs and forming consensus recommendations for future activities and program changes where possible. A detailed description of SWG activities and recommendations is provided in the Investor-Owned Utilities' Joint Energy Savings Assistant (ESA) Midcycle Progress Report.⁴⁴ The SWG provided monthly updates during the ESA Program public meetings, and overall recommendations from the IOUs were provided during the ESA Program public meeting held on August 29, 2023.⁴⁵

1.10.3 What are some of the goals for each WG and SWG in PY 2024?

The ESA WG and Council are expected to be active for 2024. Some of the planned activities and goals include:

2024 ESA WG and Council:

- Continue regular meetings with stakeholders, ensuring all topics of interest and those required by the CPUC are addressed.
- Provide a forum for the IOU's annual report summary meeting.
- Plan for wind-down activities, as the facilitator's contract expires at the end of PY 2024, and the IOUs' set aside budget for the ESA WG facilitation is expected to be exhausted by year end.
- Wrap up key learning and takeaways from the overall ESA WG experience, with respect to the need and value of continuing the ESA WG in future program years, to help inform the IOUs' next program applications.

The ESA WG is expected to have one active SWG in PY 2024.

⁴⁴ Investor-Owned Utilities' Joint Energy Savings Assistance (ESA) Midcycle Progress Report (December 20, 2023) at 75 – 80, *available at* <https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M521/K879/521879638.PDF>.

⁴⁵ See California Energy Efficiency Energy Contracts, ESA WG: CARE/FERA PEV SWG Reporting (August 29, 2023), *available at* <https://pda.energydataweb.com/#!/documents/3836/view>.

2024 Program Policy and Procedures (PP) and Installation Standards (IS) Manual SWG
(PP&IS SWG)

The PP&IS SWG will conduct standing quarterly meetings during 2024 to address general policy and procedure and installation manual updates and program measure updates. Additionally, ad hoc meetings that will focus on specific projects, such as updating the Multifamily Program Manual, reviewing inspection protocols, and developing policies for electrification will be scheduled as needed.

1.10.4 Cost Effectiveness SWG Progress Report Summary – PY 2023

As described above, the CE SWG issued its progress report in March 2023. Table 1.10.4 below details the report's key recommendations:

Table 1.10.4: Cost Effectiveness Subgroup Recommendations

Question	Recommendation
How should the cost-effectiveness guidelines in this decision be used by the IOUs to inform ESA Program design? Are there are any recommendations around how the cost effectiveness guidelines in this decision should be changed? Are there any recommendations on how the IOUs could better use cost-effectiveness tools to make program design decisions while also meeting the other goals laid out in this decision?	The Subgroup recommends that the measure-level cost-effectiveness guidelines should be modified as follows: 1) IOUs should report both ESACET and TRCRatioNoAdmin test results for the measure level. 2) For any measure that fails both tests, one of the following must be provided in order to retain the measure: • Reference Public Utility Code; • Reference documentation of HCS; • Rationale for launching new measure; or • Description of measure group efficiency. This modified process should be used as a preliminary step for the ESA Working Group's measure modification process and decision making for which measures should be kept or removed from the ESA Program. The Subgroup recommends no change to the portfolio-level cost-effectiveness guidelines or processes.
How can the Resource Test continue to provide benefit to ESA Program decision making and program design? Should the Resource Test be continued or discontinued?	The Resource Test should be discontinued at the portfolio level. It should also be discontinued at the measure level since the TRCRatioNoAdmin test provides the same results for all measures.
Can the Societal Cost Test (SCT) be used as another cost-effectiveness assessment for the ESA Program? Are the pros and cons of using this test for ESA?	The Subgroup recommends monitoring Order Instituting Rulemaking 22-11-013 for resolution of issues related to the SCT before considering using the test for the ESA Program. See Table 2 for pros and cons discussed.
Should societal NEBs be included in ESACET? If yes, which ones? How would including societal NEBs interact with societal impacts already taken into consideration in the CET's Total Resource Cost and Societal Cost Test?	Societal NEBs should not be included in the ESACET at this time but may be reconsidered in the future when new information is available from related efforts in other proceedings and/or new studies. Any societal impacts added in the future should not duplicate existing inputs to the test.

1.10.5 Mid-Cycle Report – PY 2023

In December 2023, SCE, on behalf of the Joint IOUs, timely filed the Mid-Cycle Progress Report.⁴⁶ The Mid-Cycle Progress Report did not propose any short-term program changes, nor did it request the ED to take any immediate actions on the program recommendations. Instead, an excerpted list of key recommendations were as follows:

- The IOUs do not recommend changes to Goals, Targets, or Budgets at this time.
- Currently, the IOUs do not recommend any new changes to the budget methodology for “carryover” funding.
- The IOUs do not recommend establishing goals for Health, Comfort, and Safety metrics at this juncture in the program cycle.
- The IOUs recommend the Commission confirm that annual energy savings goals identified in Section 6.7.8.1 of D.21-06-015 remain an important performance indicator of cycle goal achievement, measured and reported annually, but only used cumulatively in the determination of overall program cycle (2021-2026) goals.
- The IOUs recommend including Cost-Effectiveness and Energy Savings Goals as a future discussion with the ESA WG with potential to adjust in the next program cycle.
- The IOUs recommend working with ED staff to identify the appropriate avenue to clarify the MF property definition such that the definition could adequately account for the diverse range of multifamily property types encountered by the MFWB program.

1.11 Annual Public Meeting of ESA and CARE Program Prior Year Results

In compliance with D.12-08-044, the IOUs were ordered to host a public meeting within 60 days of filing the 2022 Low Income Programs Annual Report. As such, the joint meeting was held via webinar on June 29, 2023, at the Working Group Monthly Meeting. The IOUs presented summaries of their 2022 Program Results.

⁴⁶ Investor-Owned Utilities’ Joint Energy Savings Assistance (ESA) Midcycle Progress Report (December 20, 2023), *available at* <https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M521/K879/521879638.PDF>.

1.12 Multifamily Properties

1.12.1 The IOUs shall conduct and report an annual analysis of the square footage, energy consumption, and ESA Program participation. Please include the breakdown of market rate and deed restricted properties treated.

SDG&E used the results of a multifamily market study completed in 2020 to identify the multifamily buildings used in this analysis.⁴⁷ For “market rate” properties, sites characterized as “market rate” (with no rent restrictions) were selected. Of these, properties with a high proportion of low-income tenants were then identified using a proxy code from SDG&E’s customer data matched to each premise. 8,910 market rate properties were identified using these criteria. For “deed restricted” properties, sites with rent characterized as “controlled,” “restricted,” “subsidized” or “stabilized” were selected. 322 deed restricted properties were identified using these criteria. Of note, 130 properties in the dataset had an unidentified rent characterization; these were omitted from the analysis.

As shown in the table below, annual consumption for market rate properties in 2023 was 268,996 MWh and 21,648,126 therms. Furthermore, 1,060 of these properties received treatment through the ESA Program in 2023. Annual consumption for deed restricted properties in 2023 was 9,083 MWh and 458,639 therms, and four of these properties received energy efficiency upgrades through the ESA program in 2023.⁴⁸

⁴⁷ Residential Energy and Water Intelligence (Res-Intel), SDG&E Multifamily Market Characterization (December 2020).

⁴⁸ Properties receiving common area treatments through ESA CAM are not included.

SDG&E Multi-Family Deed and Non-Deed Restricted Property Characteristics

Rent Type	Estimated Number of Properties	Average Conditioned Area Square Footage	Total Annual MWh for 2023	Total Annual Therms for 2023	Number of Properties Treated by ESA in 2023
Market Rate	8,910	7,482	268,996	21,648,126	1,060
Deed Restricted	322	99,059	9,083	458,639	4

For 2023, deed restricted properties were treated either through ESA CAM for common area treatments or through the Main ESA Program for in-unit treatments. Section 1.12.3 provides an analysis of energy savings resulting from the common area treatments provided to deed restricted properties treated by ESA CAM in 2022.

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

In 2023, SDG&E commenced a refresh of the data from the 2020 Multifamily Market Characterization study from Res-Intel. The study follows three services to improve data for comprehensive MF targeting efforts:

- 1) linked service accounts to a specific multifamily property by creating a Multifamily Property ID as a unique identifier;
- 2) added valuable real estate data taken from San Diego County Assessor Records and CoStar such as square footage, number of units, and amenities; and
- 3) developed Energy Use Intensity and Energy Benchmark scores for each property.

The 2023 study updates the 2020 service-territory analytics for 5+ unit multifamily properties with new building data, daily kWh consumption profiles, and additional building attributes. It will add any 5+ unit MF buildings built from 2020 that were not in the previous

dataset and include new building attributes including AI predictions of the presence of a pool, and missing data such as number of units, floors, and occupied square footage. The models that generate these predictions are part of Res-Intel's Benchmark.AI software, which integrates building footprint, satellite imagery, and Light Detection & Ranging (LiDAR) to model property attributes. For instance, the models leverage these data to determine the number of conditioned structures at a property and the conditioned living area within each building. The update will include San Diego County and Orange County in the SDG&E service territory. The study is set to conclude in May 2024.

The purpose of this study is to identify and improve the understanding of the multifamily properties in SDG&E's territory. By combining building data with SDG&E AMI data, Res-Intel can evaluate energy-use intensity (kWh/ft²) and energy benchmark scores for each property. This data will inform and enhance targeted marketing and outreach for the Multifamily Energy Savings program and additional programs. These metrics will aid in identifying large energy-consuming properties and assist the SPOC in assessing whether a property is a cost-effective candidate for multiple retrofit programs. Additionally, the findings of this study offer valuable insights that can improve the marketing and outreach endeavors of various departments.

1.12.3 Normalized Metered Energy Consumption (NMEC) Analysis of the Multi-family Common Area Measures (MF-CAM) Initiative.

This section provides a Normalized Metered Energy Consumption (NMEC) analysis of multi-family properties treated through the ESA CAM initiative. The analysis requires twelve months of consumption data metered prior to measure installation date and twelve months of consumption data metered after the installation date. The analysis provided below is for properties treated in 2022.

Twenty-nine multi-family properties were treated with common area measures from January 2022 through December 2022. Installed measures include interior and exterior lighting,

a central boiler, heat pumps, a pool pump, and programmable thermostats. As shown in the table below, ex ante savings reported for these installations were 358,265 kWh and 1,488 therms. Ninety-eight percent of the electric ex ante savings resulted from the lighting upgrades, and all positive ex ante therm savings resulted from the replaced boiler. Boiler savings were the only positive therm savings, offset by negative therms from lighting interactive effects.

PY2022 ESA CAM Ex Ante Savings by End Use

Measure End Use	Number of Sites	Ex Ante kWh Savings	% of Total Ex Ante kWh	Ex Ante therm Savings	% of Total Ex Ante Therms
Central Boiler	1	N/A	N/A	2,218	149%
Heat Pump System	1	284	<1%	N/A	N/A
Lighting	29	349,879	98%	-730	-49%
Smart Thermostat	1	2	<1%	N/A	N/A
Pool Pump	1	8,100	2%	N/A	N/A
Total	29	358,265		1,488	

Evergreen was hired to perform a site level NMEC analysis on each of the properties. First, Evergreen reviewed the metered data for anomalies and outliers. SDG&E worked with Evergreen over a period of several months to research data discrepancies and provide missing or corrected data streams for sites where the metered data exhibited questionable consumption patterns. Evergreen then modeled load shapes for each site, testing various specifications and controlling for changes over time in heating and cooling degree days,⁴⁹ hours of daylight, season, and day type (weekdays versus weekends). Model results were assessed for goodness of fit using multiple statistical metrics.⁵⁰

After this baseline assessment, thirteen sites still exhibited changes in consumption patterns that could not be explained by program interventions. Evergreen adjusted these “non-

⁴⁹ Heating and cooling degree days were calculated using a base temperature of 65 degrees Fahrenheit.

⁵⁰ Metrics are provided with the site level results in Appendix G.

routine events” (NREs) using a statistical regression model to estimate the impact of the NRE on each site’s usage. Program impacts were then estimated as the difference between NRE-adjusted predictions and actual energy consumption.

The tables below present the aggregated results. Site level results are provided in Appendix H. As shown, the normalized annual kWh savings for all treated sites was 57,941 kWh which was 16% of ex ante reported savings. For the one site that received a gas measure, the normalized annual therm savings was negative 861 therms. Avoided energy use in the first year is an estimate of avoided energy usage under actual weather conditions. Normalized annual energy savings is an estimate of the annual energy savings resulting from the measures installed during a year of “typical” weather conditions.⁵¹

Annual Electric Savings from NMEC Analysis

No. Sites	Ex Ante kWh	Avoided Energy Use First Year	Normalized Energy Savings (kWh)	Realization Rate
29	358,265	51,347	57,941	16%

Annual Gas Savings from NMEC Analysis

No. Sites	Ex Ante therms	Avoided Energy Use First Year	Normalized Energy Savings (therms)	Realization Rate
29	1,488	N/A	N/A	N/A
1	2,166	(787)	(861)	-40%

Results were then reviewed by subgroups to assess patterns in realization rates (the proportion of ex ante savings that were realized). The following subgroups were analyzed:

- 14 sites were not good candidates for an NMEC analysis due to low ex ante savings relative to total usage and/or poor model fit. When these sites are removed, the remaining 15 sites have a more favorable realization rate of 59%.

⁵¹ For “typical” weather, Evergreen used CZ2018 weather data files which provide historical weather patterns observed during the period 1998 through 2017.

- 27 sites have statistically significant results for electric savings. The 2 sites with insignificant impacts are due to very low savings.
- 9 sites had negative savings. When these sites are removed, the remaining 20 sites have a more favorable realization rate of 71%.
- 8 sites have solar. For these sites, the analysis modeled net consumption.

The table below presents the normalized annual kWh saved and the realization rate for each of these subgroups. As shown, overall, the program had a 16% realization rate; however, more favorable realization rates were found for the subgroup meeting NMEC model criteria (59%) and for the subgroup with positive savings (71%).

Normalized Annual Electric Savings by Subgroups

Group	Subgroup	No. Sites	Ex Ante Savings (kWh)	Normalized Annual Savings (kWh)	Realization Rate
All	All sites	29	358,265	57,941	16%
Meets criteria for NMEC model	Meets criteria	15	245,658	145,352	59%
	Does not meet criteria	14	112,607	(87,411)	-78%
	Meets simplified criteria	18	305,448	149,319	49%
Positive or Negative Savings	Positive	20	291,004	207,996	71%
	Negative	9	67,262	(150,056)	-223%
Statistical Significance	Significant	27	350,125	56,671	16%
	Insignificant	2	8,141	1,269	16%
NREs	No NREs	17	237,946	5,757	2%
	Has NREs	12	120,319	52,183	43%
Solar	Net metered	8	136,182	(49,886)	-37%

For the single gas site in the table below, the realization rate was negative 40%. This site's data met the criteria for an NMEC analysis. In addition, the ex-post saving results were negative and statistically significant. This site also exhibited NREs, which were adjusted in the analysis.

Normalized Annual Consumption and Savings for Gas Sites

Group	No. Sites	Ex Ante Savings (Therms)	Normalized Annual Savings (Therms)	Realization Rate
All sites	1	2,166	(861)	-40%

Additional detail on the methods and results for this analysis can be found in the project report, available by request.⁵²

1.13 Miscellaneous

1.13.1 LIFT Pilot

This section is not applicable to SDG&E.

CALIFORNIA ALTERNATE RATES FOR ENERGY ANNUAL REPORT

2. CARE EXECUTIVE SUMMARY

Summary of 2023 Results

The CARE Program offers a discount on the monthly energy bill to low-income households with incomes at or below 200 percent of the FPG. The program provides a 20 percent discount on natural gas charges and a 30 to 35 percent discount on electric rates. In 2023, SDG&E's estimated eligible population for CARE enrollment was 301,966 customers. By the end of 2023, SDG&E ended with 336,819 customers enrolled in CARE, resulting in an enrollment rate of 112% of the total eligible population within its service territory, exceeding the program year goal of 90% enrollment. The growth of the CARE Program in 2023 can be attributed to SDG&E's on-going holistic marketing and outreach approach, which includes mass media, community outreach, digital and direct marketing campaigns, ethnic marketing, and live

⁵² Evergreen Economics, NMEC Analysis of Multifamily Common Area Measures for PY2022, April 2024.

outbound call campaigns. Additionally, in 2023, SDG&E implemented the following program improvements:

- New fixed income requirement for certain customers who qualify, which allows exemption from recertification and PEV requests for at least six years.
- Additional automation for processing CARE recertification forms received by paper.
- Out-of-home ads placed in laundry mats, barber shops, and grocery stores to reach hard-to-reach communities such as rural and ethnic communities.
- Surveyed 400 customers on their satisfaction with the CARE Program, which revealed that most participants remain satisfied with the CARE Program (92%).

Procedural Background

D.21-06-015 approved SDG&E's CARE Program plans and budget for the 2021-2026 program cycle. Key directives approved in the Decision included:

- (1) the extension of the CARE Expansion program recertification period from two years to four years;
- (2) establishment of an exemption for fixed income households from recertification and verification requests until their account is closed, customer of record is altered, or a minimum of six years has transpired since the customer's income was verified using program approved documentation;
- (3) establishment of a four-year recertification cycle for CARE customers with a high probability score (at least 80 percent);
- (4) modification of the post-enrollment verification requirements for customers that exceed 400 percent of baseline from one time in 12 months to three times in a 12-month period;
- (5) approval of an outbound call pilot for "attempted but failed" post-enrollment verified households;
- (6) approval for an increase in capitation fees from \$20 to up to \$30 per enrollment;
- (7) approval of the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program budget at a total of \$10,515,012 for program years 2021 – 2026;
- (8) approval of a program evaluation for CHANGES by an independent third party to detail the benefits and cost-effectiveness of services delivered to low-income customers; and
- (9) retain the 90 percent CARE enrollment rate requirement.⁵³

⁵³ D.21-06-015 at OPs 4, 6, 7, 9, 10, 13, 14, 20, and 21.

2.1 Participant Information

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

CARE Table 2.1.1 2023 Residential CARE Program ⁵⁴						
Electric Customers by Month				Gas Customers by Month ⁵⁵		
PY 2023	CARE Customers	Percentage Change		PY 2023	CARE Customers	Percentage Change
Jan	346,547	(2.5%)		Jan	204,155	(2.5%)
Feb	348,854	0.7%		Feb	205,697	0.8%
Mar	349,163	0.1%		Mar	206,062	0.2%
Apr	347,823	(0.4%)		Apr	205,255	(0.4%)
May	345,602	(0.6%)		May	203,859	(0.7%)
Jun	341,446	(1.2%)		Jun	201,042	(1.4%)
Jul	337,032	(1.3%)		Jul	198,332	(1.3%)
Aug	336,593	(0.1%)		Aug	198,098	(0.1%)
Sep	338,182	0.5%		Sep	198,757	0.3%
Oct	337,935	(0.1%)		Oct	198,387	(0.2%)
Nov	337,432	(0.2%)		Nov	197,786	(0.3%)
Dec	336,819	(0.2%)		Dec	197,442	(0.2%)

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

SDG&E used the joint utility methodology adopted in D.01-03-028 for developing monthly and annual enrollment estimates in 2023.⁵⁶ This methodology entails annual estimation of eligibility for CARE, ESA, FERA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state.⁵⁷

⁵⁴ Due to the timing of collection of CARE enrollment data, numbers throughout this report may vary slightly based on reporting timeframe from each monthly report throughout the year.

⁵⁵ Gas Customers by Month is a subset of the Electric Customers by Month.

⁵⁶ D.01-03-028 at 49-50. *See also* Compliance Filing of Pacific Gas & Electric on Behalf of Itself, Southern California Gas Company, San Diego Gas & Electric Company, and Southern California Edison Company Regarding Annual Estimates of CARE Eligible Customers and Related Information (February 14, 2022). Athens Research produces the report that is included as part of this compliance filing. The analysis and subsequent report for this compliance filing is produced by Athens Research.

⁵⁷ Athens Research performs the analysis using the joint utility methodology to provide the estimates for the California IOUs. The methodology described below is detailed within the Athens Research report.

Sources for the 2023 eligibility estimates include the Health and Human Services (HHS) Poverty Guidelines⁵⁸ (“bundling” one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327), current year small-area vendor marginal distributions on household characteristics, Census 2010 Summary File 3 (SF3) data, Census American Community Survey 2015-2022 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources.

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

The method also incorporates the impact of labor force changes (unemployment and other forms of job separation, as well as positive changes), and adjusts block-group marginal distributions on household income based on sub-state modeling that incorporates Current Population Survey, Integrated Public Use Microdata Survey Data, American Community Survey Data, and California Employment Development Department (EDD) county and Metropolitan Statistical Area level labor force series. This adjustment to block-group income marginal is then incorporated into the otherwise “standard” estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

Method adjustments include block group marginal distributions on household income based on sub-state modeling that incorporates the Current Population Survey, Integrated Public

⁵⁸ See Federal Register / Vol. 88, No. 12 / January 19, 2023 / Notices, pp. 3424-3425.

Use Microdata Survey data, American Community Survey data, and the California EDD county and metropolitan statistical area level labor force series. The adjustment to block group income marginal is then incorporated into the otherwise “standard” estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

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

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

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

The joint utility methodology, as described above, was used throughout 2023.

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

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

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

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

2.1.2.4 Describe how current CARE customers were counted.

SDG&E runs a report of active CARE participant statuses for each month in Systems Applications and Products in Data Processing (SAP), which is the system of record for CARE applications, and includes both individually metered and sub-metered CARE participants.

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

The participation rate by energy source is the total number of participating CARE customers by energy source divided by the estimated eligible CARE population by energy source. Since SDG&E provides electric service to all customers in its service territory, the number of participation rates, referred to as penetration rates in the annual and monthly report tables, are derived from electric service only.

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

Electric	23.6%
Gas	23.0%

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

Electric	13,562
Gas	9,890

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

Electric	10,289
Gas	9,352

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

Electric	76%
Gas	95%

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

SDG&E did not experience any problems administering the CARE program for sub-metered tenants during the 2023 reporting period.

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

In March 2023, SDG&E sent 310 direct mail pieces to mobile home park owners or managers promoting the CARE discount. The letter encouraged owners or managers to pass the information to their tenants and included an informational poster to hang in common areas. Mobile home residents may have also been exposed to SDG&E's CARE general awareness campaign, including TV, print, social media, and digital advertising.

2.2 CARE Budget Summary

2.2.1 Please provide CARE Program summary costs.

CARE Table 2.2.1 CARE Program Summary Costs			
CARE Budget Categories	2023 Authorized Budget ⁵⁹	2023 Actual Expenses	% of Budget Spent
Outreach	\$2,564,022	\$2,564,022	100%
Processing, Certification and Recertification	\$1,822,801	\$1,822,801	100%
Post Enrollment Verification	\$474,710	\$116,612	25%
Information Tech./Programming	\$627,640	\$617,239	98%
Pilots	\$0	\$0	0%
CHANGES	\$278,739	\$278,739	100%
Measurement and Evaluation	\$18,605	\$4,206	23%
Regulatory Compliance	\$318,250	\$210,825	66%
General Administration	\$747,761	\$534,091	71%
CPUC Energy Division Staff	\$69,925	\$18,420	26%
Total Costs	\$6,922,453	\$6,166,953	89%
CARE Rate Discount ⁶⁰	\$202,685,986	\$254,054,642	125%
Total Program Costs and Discounts	\$209,608,439	\$260,221,595	124%

2.2.2 Please provide the CARE Program enrollment rate to date.

Participants Enrolled	Eligible Participants	Enrollment Rate	Target Met?
336,819	301,966	112%	Yes

⁵⁹ Reflects total authorized budget approved in D.21-06-015, Attachment 1, Table 2, adjusted for program year 2023 fund shifts. Pursuant to OP 181 of D.21-06-015, the IOUs are authorized to shift funds between CARE program categories within the program year.

⁶⁰ CARE Rate Discount budget amount reflected in Advice Letters 4084-E and 3137-G, effective January 1, 2023.

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

In 2023, SDG&E received 3 customer complaints regarding CARE re-certification. In April, one customer claimed to have mailed in their recertification form, but SDG&E had not yet received their recertification form. The form was later received, and the customer was recertified without any interruption to the customer's discount. In September, two customers asserted complaints about having to recertify their eligibility for CARE. Both customers ultimately followed the recertification process without any interruption to their discount.

2.3 CARE Program Costs

2.3.1 Discount Cost

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

Average Monthly Electric Discount	\$53.78
Average Monthly Gas Discount	\$12.07

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

Electric Subsidy	\$223,862,169
Gas Subsidy	\$30,192,473

2.3.2 Administrative Cost

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

See CARE Table 2.2.1 – CARE Program Summary Costs.

2.3.2.2 Explain what is included in each administrative cost category.

Outreach

Costs in this category include:

- Marketing and outreach campaigns, advertising, email notifications, direct mail, telephone campaigns;
- Printing of bill inserts, brochures, and flyers;
- Printing and mailing of CARE applications and correspondence, including postage;
- Marketing and outreach staff labor;
- CBO partnership fees; and
- Capitation fees.

Processing, Certification and Recertification

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

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

Post Enrollment Verification (PEV)

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

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

Information Technology (IT)/Programming

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

Pilots

Costs include those associated with the administration of the CHANGES Program and the PEV Outbound Call Pilot.

Measurement and Evaluation

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

Regulatory Compliance

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

General Administration

Costs include office supplies, printing, facilities, training and development, and staff labor associated with program management and daily operations.

Commission Energy Division Staff Funding

Costs incurred by the Commission's Energy Division staff in support of CARE.

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

	December 31, 2023
CARE – Electric – Undercollection	\$38,832,520
CARE – Gas – Undercollection	\$6,286,363

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

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

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

The CARE surcharge and revenues paid data is included in CARE Table 10 – CARE Surcharge & Revenue in Appendix G of this report.

2.4 Marketing, Education and Outreach

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

In 2023, SDG&E's Customer Assistance Programs marketing campaign sought to connect with low-income customers across a diverse population, including hard-to-reach customers, seniors, customers with access and functional needs, and multilingual/multicultural demographics. The Customer Assistance Programs tactics supported CARE, FERA, and ESA Programs, while other tactics were program specific. The campaigns included print, streaming TV, digital media, bill inserts, ethnic marketing, email, out-of-home ads, and direct mail, with examples provided in Appendix B - F of this report. This was in addition to live calls and outreach through SDG&E's Energy Solutions Partner Network and CARE Capitation Agencies that help enroll customers in the CARE Program. More information on each tactic employed in 2023 is included below.

Mass Media

Mass media allowed SDG&E to educate and connect with its customers through diversified communication mediums designed to reach mass audiences and hard-to-reach populations, including customers in rural areas, seniors, customers with access and functional needs, and multilingual/multicultural customers. It served to drive overall awareness and complement other outreach tactics. In 2023, mass media components included print, streaming TV, general market TV, PSA-style TV interviews, digital media, out-of-home advertising, and bill inserts.

Print Campaigns

SDG&E continued to run print advertising in ethnic (African American, Asian, Hispanic) and rural (backcountry) publications, garnering 3,681,416 impressions. SDG&E continued advertising in an Eldercare Directory and family magazines and expanded its East County representation to reach a wider print audience. Samples of print campaign materials are included in Appendix D of this report.

General Market & Streaming TV

In 2023, SDG&E ran a TV commercial campaign utilizing both Linear and Streaming TV media. The 30-second spots ran on general market stations including: ABC, CBS, NBC, FOX, CW, and KUSI, garnering over 13 million impressions. SDG&E also ran campaigns on Spanish-language stations, including Univision, Telemundo and Televisa, garnering over 3 million impressions. Streaming TV ran across multiple platforms and apps for both the general market and Spanish-language markets. Streaming TV is very flexible and allows SDG&E to target customer segments more deeply and optimize performance throughout the campaign. Through streaming TV, viewers cannot fast-forward through the commercials. SDG&E ran one English and one Spanish TV commercial for a combined impression of over 2 million during the year's

second half. Additionally, SDG&E ran PSA-style TV interviews in English and Spanish, promoting available programs, including the CARE program. Examples of the TV spots are included in Appendix B of this report.

Digital

SDG&E used an integrated online strategy to increase awareness and drive online submissions by using paid search, display ads, and pre-roll video ads. SDG&E digital ads were seen over 19 million times (impressions) throughout the year, with over 7,300 customers clicking through to the CARE online application.

Bill Inserts

The annual CARE bilingual notification took place in July 2023. All customers who indicated a preference for paper bills received the bilingual application accompanied by their SDG&E bill, while paperless bill customers were provided a link to view their monthly bill inserts. SDG&E also did a double-sided, bilingual bill insert promoting the CARE and ESA Programs in February of 2023.

Ethnic Marketing

SDG&E reached numerous ethnic segments throughout the year with various mass media tactics. Hispanic, African American, Chinese, Vietnamese, and Filipino audiences were targeted by print. SDG&E continued to target Hispanic audiences via Spanish television and digital campaigns. The total spend for these ethnic media campaigns was \$212,525, which is detailed in Appendix A.

Email Campaigns

In 2023, SDG&E continued the strategy of using the nurture campaign model. The nurture campaign includes a series of pre-written, automated emails to customers based on their

reaction to an initial email. This allows SDG&E to provide more customized messaging in automated follow-up emails. The actions that determine the messaging are:

- Opened an email;
- Did not open an email;
- Clicked on a link within an email;
- Visited a webpage; or
- Clicked on a link within a webpage.

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

Additionally, in accordance with the Community Choice Aggregation (CCA) Code of Conduct, SDG&E used email creative that shows non-CARE/non-CCA customers' potential bill savings if they applied for and qualified for CARE. The email indicated how much the customer paid on their energy bill compared to what the customer would have paid if on CARE, highlighting the savings.

The campaigns also contained integrated messaging and directed customers to the online CARE application. Subject lines and content were modified throughout the campaign based on customer behavior. In 2023, SDG&E sent over 347,600 bill comparison emails. Unique open rates, defined as how many people opened the email, were as high as 52%, indicating the subject lines were compelling to customers. By comparison, the energy industry-standard open rates are approximately 33%. CARE emails garnered an average click-through rate of 4.4%.

Direct Mail

SDG&E conducted a direct mail CARE campaign in 2023. SDG&E sent a letter to customers illustrating their bill savings if they were on CARE, like the emails sent as described in the previous section. The letter encouraged recipients to call SDG&E's toll-free enrollment

number or to apply through SDG&E's online application. SDG&E's Direct Mail campaign was sent to 14,589 customers. Appendix F of this report shows a sample of the Direct Mail message.

CHANGES Program

The Community Help and Awareness of Natural Gas and Electric Services (CHANGES) program is a statewide program administered by a Commission selected third party lead contractor. The lead contractor selects and subcontracts with CBOs who act as utility liaisons for limited English proficient customers with utility inquiries and issues. In SDG&E's service territory, these CBOs are the Alliance for African Assistance, Deaf Community Services of San Diego, and Casa Familiar. The CBOs target specific communities and offer other programs that are meant to complement SDG&E's services. The lists of CBOs in SDG&E's service territory were shared with SDG&E's internal Call Center and Outreach team. The IOUs and CHANGES teams met regularly in 2023 to discuss program effectiveness.

Live Call Campaign

The Harris Group (THG) utilized the data analysis from the CARE prospect list and continued an outbound call campaign to reach out to potentially eligible customers who live in SDG&E's service territory. THG's outbound call campaign (Live Call Campaign) also included a CARE Recertification Campaign. For 2023, the THG Live Call Campaign and CARE Recertification Campaign efforts resulted in over 24,214 completed CARE applications, contributed to over 19,000 new CARE enrollments, and over 5,000 CARE recertifications.

Community Outreach

Community outreach allows SDG&E to engage and connect customers with energy savings solutions and programs in the communities where they work and live. These outreach activities provide information about SDG&E's CARE Program to potentially eligible customers. SDG&E has established partnerships with social service entities, such as the County of San

Diego Health and Human Services Agency (HHSA), Access to Independence, and ElderHelp of San Diego, to connect with customers who are considered hard-to-reach or potentially have a language barrier. In 2023, SDG&E also leveraged its established partnerships with the Energy Solutions Partner network and additional non-profit organizations, upon request, to deliver over 75 presentations, workshops, and trainings, and participated in over 460 community events to assist SDG&E in securing enrollments through an organization that customers trust. The partnership with HHSA resulted in over 900 CARE applications, 750 CARE enrollments, and 200 CARE recertifications.

CARE Capitation Agencies

SDG&E partners with 22 social service agencies such as the WIC program, refugee assimilation organizations, 211 San Diego, and others to help enroll hard-to-reach customers. These organizations serve vulnerable, low-income individuals and families with enrollment in state and federally funded assistance programs, including Cal Fresh, LIHEAP, and Covered California. The partnering organizations provide multilingual staffing and are in diverse, low-income communities serving multicultural/multilingual seniors, veterans, individuals with access and functional needs, and limited English proficient (LEP) audiences. These partners contributed to over 2,700 CARE applications, over 1,500 CARE enrollments, and over 675 CARE recertifications.

Energy Solutions Partner Network

As previously mentioned, SDG&E works closely with a network of approximately 200 CBOs to connect customers with programs and solutions related to Customer Assistance, Energy Efficiency and Conservation, Public Safety Power Shutoffs, resiliency, wildfire preparedness, and bill debt repayment. These organizations represent the diversity of SDG&E's customers within its service territory. Many of these CBOs are small, grassroots agencies serving customers

with access and functional needs, including those that are multicultural, multilingual, low income, seniors, and LEP audiences in communities of concern. These partners help educate and enroll customers in low-income programs utilizing a variety of tactics, including messaging through email, social media channels such as Facebook, X, and Instagram, posting information on their websites, providing booth space at events, and hosting enrollment day fairs at their locations. In 2023, over 2,700 activities were coordinated through this partner network to promote SDG&E's Customer Assistance Programs, resulting in over 2,300 social media messages – Facebook, Twitter, and Instagram – by SDG&E's Energy Solutions Partner network, reaching over six million impressions. The Energy Solutions Partner Network's activities generated about 150 completed CARE applications, over 125 CARE enrollments, and over 40 CARE recertifications.

Community Events & Presentations

Every year, SDG&E participates in hundreds of community events and presentations throughout its service area. Many of SDG&E's Energy Solutions Partners host community events that offer social services and customer education opportunities such as: health and wellness fairs, community resource fairs, food banks, police and fire department open houses, and cultural fairs, as well as educational/STEM activities through schools and communities. SDG&E believes these are excellent opportunities to participate in and further promote Customer Assistance Programs, since the events often attract a variety of customer demographics including those on a fixed-income, youth, seniors, and individuals with access and functional needs. These community events also service SDG&E's rural, tribal, and harder to reach populations. In 2023, SDG&E promoted CARE and other Customer Assistance Programs in over 540 presentations and events, reaching over 98,000 people.

Branch Offices and Customer Care Center

SDG&E's Outreach team collaborates, as needed, with the Branch Offices and bill payment locations to aid in educating customers on programs and services during impacted times of the year, such as summer months where customers may experience higher bills. In 2023, the branch offices received over 900 CARE applications, resulting in roughly 850 CARE enrollments, and 190 CARE recertifications.

SDG&E's Customer Care Center also assists about one million customers with a variety of energy inquiries each year. Customers are provided with information about the CARE Program in both English and Spanish via the Interactive Voice Recognition System over the phone while waiting to speak with an Energy Service Specialist (ESS). An ESS offers the CARE Program and guides customers to the online application. In 2023, the Customer Contact Center contributed to 11 CARE enrollments. Additionally, the Outreach team processed 60 CARE recertifications.

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

In 2023, approximately 252,000 (83%) CARE customers received a Home Energy Report (HER) representing 26% of the 950,00 recipients in the HER Program. The reports include a comparable homes comparison module that allows recipients to see how their consumption compares to homes of the same general size within their area. Additionally, the reports educate customers on their energy consumption, provide energy saving tips and when applicable, encourage enrollment in CARE for those not already participating. Additionally, 226,000 CARE customers signed up through the HER program to receive emailed energy efficiency alerts to help them proactively manage their usage.

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

SDG&E continues to look for the most effective ways to communicate with customers. As stated above, in 2023, SDG&E utilized several different outreach methods to enroll eligible CARE customers. The effectiveness of each outreach method is measured differently. Some outreach methods are measured on open rates, number of impressions, number of customers educated and informed of the program, and number of customers enrolled. Of the different outreach methods, it is hard to define which one was the most effective because it can take several marketing impressions before a customer acts.

If outreach effectiveness is based on the number of CARE enrollments and the conversion rate, the most successful and effective method was the “Live CARE Call Campaign” administered by THG. This campaign resulted in 24,214 submitted CARE applications and enrolled over 19,384 new CARE customers, a 97% conversion rate. The campaign also resulted in 5,370 CARE recertifications for eligible customers. To measure the success of certain outreach methods, SDG&E provides each CARE partner, contractor, and activity with a unique source code number that they submit with each CARE application. This allows SDG&E to track each CARE application, CARE recertification, and CARE enrollment by source.

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

In 2023, SDG&E ended the program year with a 112% enrollment rate, exceeding the enrollment goal of 90%. As such, SDG&E did not experience any barriers in program participation.

However, as part of SDG&E’s continuous effort to learn and gain a better understanding of customers’ experiences with the CARE program, 400 participants were surveyed as part of a customer satisfaction survey. The survey results revealed that most participants remain satisfied

with the CARE Program (92%) and expect to continue participating. The surveys also provided the following insights:

- Respondents rated the enrollment process very high (89%) in terms of being easy to understand;
- Awareness of the income verification and renewal process was high, and nearly all say they would provide requested paperwork, as needed;
- Email is the most-preferred method of communication for receiving information on the program;
- Online is the most-common method for submitting the application;
- All respondents say they have taken at least one step to save money on their utility bill; and
- The most common recommendation is to provide a larger discount.

These insights will inform SDG&E in future marketing and outreach initiatives and consider customer communication preferences and enrollment application access while balancing proven strategies that have resulted in consistently high approval rates year over year.

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

SDG&E and SoCalGas share data for customers in Orange County who are served by both SoCalGas and SDG&E via automated secure file transfer process compliant with customer privacy protocols. In 2023, SDG&E received 229 enrollments through this effort. In addition, SDG&E shares CARE customer data with California American Water (CalAm) to assist in identifying customers for their Customer Assistance Programs. In 2023, SDG&E provided over 345,000 leads to CalAm.

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

When an eligible online enrollment or recertification for the CARE Program is received, an ESA lead is automatically sent to the Energy Efficiency Collaboration Platform (EECP)

system⁶¹ and is labeled as “CARE Income Certified,” to let the ESA implementer know they do not need to perform the income eligibility process for this customer during the in-home energy assessment visit. Similarly, when an ESA enrollment is received, the EECF system sends the ESA eligibility information to the CARE Program enrollment system. The CARE Program system determines if the customer will be auto-enrolled, income certified, or recertified based on their current CARE status. This collaboration and automation increased the number of qualified leads and CARE enrollments and reduced the number of letters sent for CARE recertification and PEV.

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

SDG&E partners with CBOs and social service providers throughout San Diego, which continues to be an effective form of leveraging and enrolling customers into the CARE, FERA, and ESA Programs. These organizations are involved daily with customers that meet the Commission’s income or categorical qualifications and provide a one stop source for resources. Some of these organizations are WIC, CalFresh, LIHEAP, Covered California, and California Lifeline. Other partners include the CARE Capitation agencies such as 211 San Diego, and LIHEAP contractors. The CARE, FERA, and ESA Programs were promoted through presentations, events, workshops, and customized partner network messaging. Additionally, as mentioned above, SDG&E CARE enrollment leads are shared with the ESA Program, increasing customer reach of other low-income programs.

⁶¹ A customer is determined to be eligible based on the prior treated date.

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

See Section 1.2.6 above.

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

SDG&E continues to find value in leveraging partners such as CSD. This partnership demonstrates SDG&E's commitment to utilize every feasible effort to reach out to customers in need. SDG&E promotes the CSD's LIHEAP bill payment assistance and weatherization programs and includes CSD LIHEAP's phone number on SDG&E's CARE applications and program materials so customers have direct contact information to access services. SDG&E's Customer Assistance Programs staff also inform customers about services offered by CSD and refers customers to CSD for additional bill assistance through LIHEAP. Lastly, SDG&E's agreement with 211 San Diego requires part of the customer screening performed by 211 to include referral to LIHEAP agencies such as CUI and MAAC, as appropriate. In 2023, 211 San Diego handled approximately 85,876 utility-related calls and referred 12,039 of those to LIHEAP agencies.

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

In 2023, pursuant to OP 7 of D.21-06-015, SDG&E implemented the new fixed income requirement. The new requirement allows certain fixed-income CARE who verify their income using approved documentation to be exempt from future recertification and verification requests for a minimum of six years, if the customer account is closed, or customer-of-record name is altered. The new requirement will allow certain fixed income customers to remain in the CARE program for a longer period, and in return, less recertifications and PEV notifications will be sent to these customers reducing processing time and costs associated with processing labor and sending notifications.

Additionally, SDG&E also implemented additional automation for processing CARE recertification forms received by paper. The added automation reduced the amount of time spent manually processing recertification forms. The reduction in processing time was equivalent to one full-time employee per month that would have otherwise been needed to process recertification forms.

Lastly, to increase and improve enrollment to non-participating households, SDG&E implemented out-of-home ads in laundry mats and grocery stores in hard-to-reach communities such as rural and ethnic communities. For additional information on this effort, please see below.

2.4.10 Low CARE Penetration Zip Codes: Discuss the strategies that were effective in targeting and enrolling these hard to reach households. Include the IOU's successes, short-comings, and corrective plans in ME&O strategies to enroll customers in zip codes that fall into these categories.

In 2023, SDG&E ran CARE ads in print publications that targeted hard-to-reach rural customers, ethnic communities, families, and seniors. Fifty-six ads ran across 20 different publications for over 3,681,000 impressions. Additionally, SDG&E strategically used out-of-home advertising in hard-to-reach communities by placing 59 English and Spanish ads in laundry mats, grocery stores, barber shops and other community businesses. It is estimated that these ads had over 2.8 million views.

2.5 Processing CARE Applications

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

In general, tenants of sub-metered facilities follow similar recertification guidelines as individually metered dwellings. Sub-metered tenants are provided with a two-year recertification period, except for fixed income tenants who are required to recertify every four to six years. Once sub-metered tenants are due to recertify, they are provided with a mailed renewal request. If no response is received within 60 days, SDG&E mails a second request. If the customer does not respond to the two written notices, a final call is made to the customer 30 days prior to removal.

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

Collaboration with third party contractors is a necessary component to successfully reach and enroll hard-to-reach and under-served customers. In 2023, SDG&E partnered with third parties to conduct certification and recertification of CARE customers on the utility's behalf.

SDG&E contracted with THG to conduct a Live Call Campaign and CARE Recertification Campaign, resulting in 19,384 CARE enrollments and 5,370 recertifications. SDG&E also partnered with 211 San Diego to provide a 24-hour resource and information center connecting residents with community, health, and disaster services.

Customers often contact 211 San Diego in an emergency to locate important resources including bill assistance programs, food, and shelter. The 211 San Diego partnership resulted in 1,431 CARE enrollments and 535 CARE recertifications.

SDG&E measures the effectiveness of the CARE outreach program in two ways. The first measure of success is generating overall program education and awareness through mass media and community outreach tactics. The second is customer engagement to generate and measure enrollments. For these harder-to-reach and underserved audiences, it is important to utilize multiple tactics as stated above. It is difficult to evaluate cost-effectiveness per tactic, given that some of these tactics cannot be directly sourced to the actual customer enrollment and/or that the customer may experience multiple tactics prior to completing recertification. This is particularly true for mass media tactics like television, print, and online advertisements. In 2023, SDG&E's online advertising garnered over 19 million impressions (the number of times an online user saw an SDG&E ad), while ethnic print advertising had a readership of over 2.3 million and ethnic television garnered over 3.9 million impressions. All mass media channels encouraged customers to call SDG&E's toll-free number or visit SDG&E's website to complete an online application. It is challenging to determine how many impressions it took for customers who enrolled through the toll-free and online application process. However, as a general marketing principle, it may take 10 or more interactions with a customer to build an appropriate level of awareness and engagement that leads to a desired action.

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

2.6 Program Management

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

~~In 2023, SDG&E did not experience any issues or events that significantly affected management of the CARE Program.~~ SDG&E identified an operational issue recently where certain LIHEAP customers were not auto enrolled in CARE. The issue impacted 225 customers in 2023. SDG&E has since resolved the issue by implementing a mitigation to ensure all LIHEAP customers not already enrolled in CARE are automatically enrolled. SDG&E provided bill corrections to all impacted customers for the period they were not on the CARE rate.

2.7 Pilots

CARE Post-Enrollment Verification (PEV) Outbound Call Pilot

In June 2022, as ordered in D.21-06-015, SDG&E launched its PEV Outbound Call Pilot designed to provide direct support to customers with incomplete or incorrect CARE PEV documentation, which is required to verify program eligibility.⁶² The Commission ordered the IOUs to conduct this Pilot for six to twelve months to explore if a service like this would be

⁶² D.21-06-015 at 21 – 22.

effective in minimizing PEV de-enrollments.⁶³ SDG&E's outbound call pilot ran for eleven months from June 2022 through April 2023 with a total direct cost of \$17,982.

The outbound call support process consisted of the below:

- SDG&E Customer Service Representatives (CSR) placed a direct call to customers who submitted incomplete or incorrect PEV documentation.
- If the CSR was not able to reach a customer on the first attempt, the CSR would place a second and final follow-up call to the customer within the same week the first attempt was made.
- If customer contact was made, the CSR assisted the customer with completing the PEV process by discussing the overall PEV process, reviewing the various types of acceptable documentation, and answering any questions that might come up.
- The CSR documented and tracked customer engagement call results and outcomes.

SDG&E contacted a total of 502 customers. SDG&E spoke to 208 customers and 136 customers successfully provided the documentation for post enrollment verification. The overall success rate of households that completed the PEV process within 90 days of receiving a call or voice mail was 27%. Pursuant to OP 13 of D.21-06-015, SDG&E submitted a Tier 2 AL detailing the pilot results and the IOUs' recommendation on whether the pilot should conclude, be continued, expanded, or turned into a permanent effort.⁶⁴ Based on the results of the 11-month pilot, SDG&E did not recommend turning the PEV outbound call pilot design into a permanent effort.⁶⁵ The CSRs who conducted the outbound calls reported that many customers they spoke with did not have the patience to go over the PEV process and would rush through the call. This led SDG&E to believe that these customers did not wish to be contacted and/or did not have an interest in understanding the CARE PEV process. As such, SDG&E's proposal was to incorporate a one-time courtesy phone call for customers who provide incomplete or incorrect

⁶³ D.21-06-015 at 41.

⁶⁴ D.21-06-015 at OP 13.

⁶⁵ SDG&E Advice Letter 4265-E, approved September 11, 2023 and effective August 30, 2023 at 4, available at https://tariff.sdge.com/tm2/pdf/submittals/elec_4265-e.pdf.

documentation for the purpose of completing the PEV process. Additional details on the PEV outbound call pilot can be found in SDG&E's Advice Letter 4265-E.⁶⁶

2.8 Studies

Community Help and Awareness with Natural Gas and Electricity Services

(CHANGES) Evaluation

D.21-06-015 required two evaluations of the CHANGES program to assess the benefits and cost effectiveness of services and to determine the most appropriate funding source for the program. The first of these two statewide evaluations, managed by PG&E, began in February 2022, with Opinion Dynamics as the selected evaluation consultant. The evaluation's study team consisted of representatives from the CPUC Consumer Affairs Branch, Energy Division and the IOUs. This process evaluation of the CHANGES program was designed to cover five key areas: Overall Performance, Data Collection, Program Value, Program Costs and Funding, and Program Operations and Structure. To address the study's objectives, a mixed-methods approach was employed to leverage existing data sources and collect new primary data. Primary data originated from in-depth interviews conducted with CPUC staff, IOUs, the program implementer, and select CBOs within the network managed by the program implementer. In addition, a mail survey was conducted with PY 2021 program participants. The survey was made available in English and four other most common languages spoken by CHANGES customers, including Chinese, Spanish, Vietnamese, and Korean, and had a positive response rate of 8.8%.

Two public workshops were held before finalizing the draft research plan and final report, respectively, to gather stakeholder feedback and incorporate in the final deliverables.

⁶⁶ *Id.*

Upon the completion of three research tasks – evaluability assessment, program costs and benefits assessment, and spatiotemporal distribution analysis, the evaluation resulted in the following conclusions and recommendations:⁶⁷

1. The CHANGES program is conducting activities aligned with its four stated objectives through program activities.
2. Current data collection and tracking practices limit the ability of program implementers and stakeholders to understand the full impact of the program on LEP customers.
 - a. Specific recommendations include improving the accessibility, completeness, and quality of program tracking data, along with codifying metrics related to program activities, client characteristics, program referrals, and assistance outcomes among other areas.
3. COVID-19-related budget impacts and demand fluctuations suggest that a longer time horizon is needed to comprehensively assess the basis for funding expansion.
4. Program costs may not be fairly distributed across the IOUs, as indicated by the services provided in their territories. As such, the traditional funding split of 30% for PG&E, 30% for SCE, 25% for SoCalGas, and 15% for SDG&E is not reflective of actual program activities.
5. Data on the distribution of CBOs and program activity indicates the current model may have some weaknesses in ensuring adequate coverage in all areas of need, with underserved areas located within and outside of IOU territories.
6. Based on the services provided and the customers who benefit, funding the CHANGES Program through the CARE budget is appropriate as compared to the general rate case (GRC).

2025 Low Income Needs Assessment (LINA)

See ESA Section 1.8.1 of this report for details on this study.

Categorical Eligibility Study

See ESA Section 1.8.2 of this report for details on this study.

2.9 CARE Working Groups and Sub-working Groups (SWG)

Pursuant to OP 2 of D.22-12-029, the IOUs were directed to form the CARE sub-working group (SWG) to explore improvements of the income verification procedures and policies.

Additionally, pursuant to OP 5 of D.22-12-029, IOUs were ordered to submit the

⁶⁷ Opinion Dynamics CHANGES Program Process Evaluation Study (2019-2021) (June 2023), *available at* https://www.calmac.org/publications/CHANGES_Evaluation_Report_CALMAC.pdf.

recommendations that resulted from the sub-working group in the joint mid-cycle report directed in D.21-06-015.

The CARE/FERA PEV SWG was established by February 14, 2023, and met bi-weekly to monthly for six months. D.22-12-029 provided a list of questions for the CARE/FERA PEV SWG to address in its recommendations and next steps. The CARE SWG provided monthly updates during the ESA Working Group public meetings. Recommendations from the IOUs were presented during the ESA Working Group public meeting on August 29, 2023⁶⁸ and filed in the 2023 Joint Mid-Cycle Report submitted on December 20, 2023.⁶⁹

CARE/FERA PEV SWG Members included IOUs, ED, Cal Advocates, ValleyCan, Liberty Utility, and other ad hoc members. SWG was facilitated by a representative from Statwizards, LLC.

2.10 Miscellaneous

2.10.1 Describe outreach efforts contained in Attachment 6 of the Joint Stipulation adopted in D.21-06-015.

SDG&E complied with the terms of the Joint Stipulation adopted in D.21-06-015 by integrating affordable broadband marketing, education, and outreach. See ESA Program Section 1.5.2 for additional details on Attachment 6 of the Joint Stipulation adopted in D.21-06-015.

⁶⁸ See California Energy Efficiency Energy Contracts, ESA WG: CARE/FERA PEV SWG Reporting (August 29, 2023), *available at* <https://pda.energydataweb.com/#!/documents/3836/view>.

⁶⁹ See Investor-Owned Utilities' Joint Energy Savings Assistance (ESA) Midcycle Progress Report (December 20, 2023), *available at* <https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M521/K879/521879638.PDF>.

3. CARE EXPANSION PROGRAM

3.1 Participant Information

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

2023	Commercial		Residential	
Month	Electric	Gas	Electric	Gas
Jan	177	105	536	202
Feb	176	103	534	199
Mar	176	103	541	199
Apr	169	104	529	202
May	187	110	547	213
Jun	185	111	564	221
Jul	136	79	465	166
Aug	92	52	349	109
Sep	91	51	346	112
Oct	83	53	371	112
Nov	89	53	371	112
Dec	88	51	373	114

3. 3.1.2 State the total number of residents (excluding caregivers) for residential facilities, and for commercial facilities, by energy source, at year-end.

Facility Type	Electric	Gas
Commercial	4,749	2,747
Residential	1,448	658

3.2 Usage Information

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

Commodity	Residential	Commercial
Gas	39.18	463.57
Electric	358.09	10,690.90

3.3 Program Cost

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

The CARE expansion program’s administrative cost by category is reported as part of the overall program administrative expenses. See above section 2.2.1 or CARE Table 1.

3.3.2 Discount Information

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

Residential Facility Gas Discount	\$6,517.71
Residential Facility Electric Discount	\$20,909.85

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

Commercial Facility Gas Discount	\$2,869.76
Commercial Facility Electric Discount	\$20,266.68

3.4 Outreach

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

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

In 2023, SDG&E sent a targeted email campaign to 3,500 potentially eligible non-profit organizations and agricultural facilities promoting Expanded CARE. The email listed the

benefits of enrolling in Expanded CARE and encouraged eligible customers to apply on the SDG&E website.

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

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

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

The shared territory between SDG&E and SoCalGas is in Southern Orange County. As described above under Section 2.4.4, the two utilities share relevant program information via secure file transfer process on Expanded CARE facilities as needed.

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

A barrier to participation for Expanded CARE stems from the inability of many facilities to meet the program guidelines, specifically the requirements of having 100% resident eligibility and corporate tax status requirements (e.g., local government-run facilities and others are excluded from participation). SDG&E's Marketing and Outreach and Account Executive teams continue to promote Expanded CARE to potentially eligible customers through email campaigns, general outreach activities, and through the Energy Solutions Partner Network when applicable.

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

In 2023, SDG&E launched a targeted marketing campaign to non-profit organizations and agricultural facilities to encourage eligible customers to apply for Expanded CARE. As mentioned above, the email marketing campaign consisted of messaging encouraging the enrollment of eligible facilities into the CARE Expansion program. Facilities were directed to the SDG&E website for more information and to access the application for the program.

Additionally, to improve the probability of non-participating facilities' enrollment in the CARE Expansion program, SDG&E's Outreach and Account Executive teams continue to reiterate eligibility guidelines when applicable. SDG&E continues to explore ways to improve its operational cost-effectiveness, processing of applications, program delivery, and outreach and enrollment services for prospective CARE Expansion enrollees.

3.5 Program Management

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

In 2023, SDG&E did not experience any issues or events that significantly affected CARE Expansion program management.

FAMILY ELECTRIC RATE ASSISTANCE PROGRAM ANNUAL REPORT

4. FERA EXECUTIVE SUMMARY

Summary of 2023 Results

In 2023, SDG&E's estimated target enrollment for FERA was ~~43,709~~ 42,980. By program year-end, SDG&E had a total of 10,428 participants in FERA, reaching an enrollment rate of 24%, which fell short of the 50% enrollment goal for 2023 set by D.21-06-015. In a continued effort to increase FERA program enrollments, SDG&E focused on new marketing and outreach initiatives to promote the FERA program. Some of the new initiatives include targeting previously enrolled CARE and FERA customers, leveraging customer lists received from data sharing agreements for targeted marketing campaigns, updating the FERA propensity model by removing the household size of 3 which expands the targeted audience, and prioritizing FERA through community outreach events and presentations.

Additionally, the first customer satisfaction survey was conducted among 178 FERA customers, which revealed that a large portion of participants are satisfied with the FERA program.

SDG&E will continue to explore new marketing and outreach initiatives in 2024 by leveraging lessons learned to reach its annual enrollment goal.

Procedural Background

The FERA Program is statutorily mandated by P.U. Code Sections 739.1 and 739.12 to assist low- to middle-income-eligible households with a monthly average effective discount of 18% on their electric bills. To qualify for the FERA Program, eligible customers must consist of households with three or more persons with total annual household gross income between 200% (plus \$1) and 250% of the FPG.

D.21-06-015 directed PG&E, SCE, and SDG&E (collectively, the Joint Utilities) to each achieve an enrollment goal of 50 percent by 2023 and a 70 percent goal by 2026, establish an auto-recertification process that mirrors the CARE Program auto-recertification process, implement a high usage post-enrollment verification process that aligns with CARE, and auto-enroll in FERA all customers who fail to meet the CARE income guidelines but meet the FERA Program qualifications.⁷⁰ D.21-06-015 also approved a FERA administrative budget, which included costs for FERA specific marketing and outreach strategies.⁷¹ With this approved marketing and outreach strategy came the establishment of a new capitation program for FERA and set the reimbursement rate for capitation contractors at up to \$30 per enrollment.⁷² Lastly, D.21-06-015 directed the Joint Utilities to combine the FERA monthly and annual reporting with the CARE and ESA monthly and annual reporting beginning with the 2022 programmatic year.⁷³

Per Commission direction, SDG&E utilizes existing CARE Program procedures to administer the FERA Program. Such activities include, but are not limited to, outreach practices, enrollment, verification, and recertification activities.⁷⁴

⁷⁰ D.21-06-015 at OPs 24, 27, 28, and 30.

⁷¹ *Id.* at OP 1.

⁷² *Id.* at OP 32.

⁷³ *Id.* at OP 185.

⁷⁴ P.U. Code Section 739.1(f)(2).

4.1 Participant Information

4.1.1 Provide the total number of FERA customers By Month for the Reporting Period.

FERA Table 4.1.1 2023 Total Number of FERA Enrolled Customers			
2023	FERA Enrolled ⁷⁵	FERA Eligible Households	FERA Enrollment Rate
January	12,339	43,709 <u>42,980</u>	28% <u>29%</u>
February	12,172	43,709 <u>42,980</u>	28%
March	12,107	43,709 <u>42,980</u>	28%
April	11,976	43,709 <u>42,980</u>	27% <u>28%</u>
May	11,711	43,709 <u>42,980</u>	27%
June	11,420	43,709 <u>42,980</u>	26% <u>27%</u>
July	11,186	43,709 <u>42,980</u>	26%
August	11,057	43,709 <u>42,980</u>	25% <u>26%</u>
September	10,990	43,709 <u>42,980</u>	25% <u>26%</u>
October	10,829	43,709 <u>42,980</u>	25%
November	10,631	43,709 <u>42,980</u>	24% <u>25%</u>
December	10,428	43,709 <u>42,980</u>	24%

4.1.2 Provide the Total Number of FERA-Eligible Households, FERA-Participating Households, and FERA Household Enrollment Rates By Quarter.

See FERA Table 4.1.1 – 2023 Total Number of FERA Enrolled Customers.

4.1.3 Discuss How the Estimates of Current FERA-Eligible Households Were Developed.

SDG&E used the joint utility methodology adopted by the Commission in D.01-03-028 for developing monthly and annual enrollment estimates in 2022. This methodology entails annual estimation of eligibility for CARE, ESA, FERA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state. Sources for the 2023 eligibility estimates include the Health and Human Services (HHS) Poverty Guidelines⁷⁰ (“bundling” one- and two-person households at the HHS-defined

⁷⁵ The “FERA Enrolled” column reflects the cumulative number of customers in the relevant month that received the discount and excludes sub-meter accounts.

200% FPG limit as required by AB 327), current year small-area vendor marginal distributions on household characteristics, Census 2010 Summary File 3 (SF3) data, Census American Community Survey 2015-2022 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources. The method considers American Community Survey microdata relationships between guideline status (above/below 200% FPG), tenure, and fuel payment relationships. These cross classifications are fitted to small area (block group) marginals to produce payer type specific distributions, which can be aggregated to various other geographical levels. The method also incorporates the impact of labor force changes (unemployment and other forms of job separation, as well as positive changes), and adjusts block-group marginal distributions on household income based on sub-state modeling that incorporates Current Population Survey, Integrated Public Use Microdata Survey Data, American Community Survey Data, and California Employment Development Department (EDD) county and Metropolitan Statistical Area level labor force series. This adjustment to block-group income marginal is then incorporated into the otherwise “standard” estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

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

overall) that are enrolled in FERA. The FERA household total, including individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility.

4.1.4 Provide the Current FERA Sub-Metered Tenant Counts at Year-End.

At year-end 2023, SDG&E had 49 sub-metered tenants participating in FERA.

4.1.5 Discuss Any Problems Encountered During the Reporting Period Administering the FERA Program for Sub-Metered Tenants and/or Master-Meter Customers.

In 2023, SDG&E did not encounter any problems administering the FERA program for sub-metered tenants or master-meter customers.

4.2 FERA PROGRAM COSTS

4.2.1 FERA Discount Cost

4.2.1.1 State the Average Monthly FERA Discount Received, In Dollars Per FERA Customer.

The average monthly FERA discount per customer in program year 2023 was \$25.45.

4.2.1.2 State the Cumulative Annual Discount for All FERA Customers.

The cumulative annual FERA Program discount provided to all FERA customers in program year 2023 was \$4,670,344.

4.2.2 FERA Administrative Costs

4.2.2.1 Show the FERA Program's administrative cost by category.

FERA Table 4.2.2.1 FERA Program Summary Costs			
FERA Budget Categories	2023 Authorized Budget ⁷⁶	2023 Actual Expenses	% of Budget Spent
Outreach	\$388,638	\$388,638	100%

⁷⁶ Reflects total authorized budget approved in D.21-06-015, Attachment 1, Table 4, adjusted for program year 2023 fund shifts. D.21-06-015 granted the IOUs authority to shift funds between the FERA program categories.

Processing, Certification and Recertification	\$18,223	\$18,223	100%
Post Enrollment Verification	\$8,726	\$8,726	100%
Information Tech./Programming	\$53,045	\$9,766	18%
Pilots	\$0	\$0	0%
Measurement and Evaluation	\$12,957	\$0	0%
Regulatory Compliance	\$46,425	\$46,425	100%
General Administration	\$73,891	\$45,945	62%
CPUC Energy Division Staff	\$10,488	\$2,366	23%
Total Costs	\$612,393	\$520,090	85%
FERA Rate Discount ⁷⁷	\$4,170,665	\$4,670,344	112%
Total Program Costs and Discounts	\$4,783,058	\$5,190,434	109%

4.2.2.2 Explain what is included in each administrative cost category.

Outreach

Costs in this category include:

- marketing and outreach campaigns, advertising, email notifications, direct mail, telephone campaigns;
- Printing of bill inserts, brochures and flyers;
- Printing and mailing of FERA applications and correspondence, including postage;
- Marketing and outreach staff labor;
- CBO partnership fees; and
- Capitation fees.

Processing, Certification, and Verification

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

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

⁷⁷ FERA Rate Discount budget amount as reflected in Advice Letters 4084-E, effective January 1, 2023.

Post Enrollment Verification (PEV)

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

- Processing FERA income verification;
- Responding to customer inquiries regarding FERA income verification documents; and
- Resolving customer issues related to income verification.

Information Technology (IT)/Programming

Costs include IT system support related to maintenance of program systems such as: staff and contractor labor, FERA documents, system reports, and costs associated with system enhancements to comply with Commission mandates and to improve operational efficiencies.

Measurement and Evaluation

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

Regulatory Compliance

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

General Administration

Costs include but are not limited to office supplies, facilities, training, and development, as well as staff labor associated with program management and daily operations.

Commission Energy Division Staff Funding

Costs incurred by the Commission’s Energy Division staff in support of FERA.

Customer Benefits

Costs associated with customer benefits include the value of the FERA discounts provided to customers.

4.2.2.3 Explain how costs of joint CARE/FERA activities are charged to each program.

The costs of distinct CARE and FERA activities are charged separately to each program using separate source codes. To the extent possible, the costs of joint CARE and FERA activities are allocated in proportion to the work that was attributable to either CARE or FERA.

4.2.2.4 Provide the year-end December 31 balances for the FERA balancing account for both the current and prior reporting periods.

	2022	2023
FERA Balancing Account (FERABA) - Undercollection	\$1,004,570	\$221,449

4.3 Marketing, Education and Outreach

4.3.1 Discuss Utility Outreach Activities and Those Undertaken by Third Parties On The Utility’s Behalf.

General Awareness

SDG&E leveraged traditional messaging, social media platforms, and paid media to promote FERA. SDG&E used a variety of factors to identify customers most likely to qualify for the FERA Program, which included the most current Athens Research Study and SDG&E’s Residential Segmentation model.

Direct Mail

In 2023, SDG&E continued sending FERA bill comparison letters to potentially eligible FERA customers. For non-CCA customers without an email address, SDG&E sent a bill

comparison letter showing customers what their bill could have been if the customer was enrolled in FERA. SDG&E sent 8,867 FERA bill comparison letters in the 2023 program year. SDG&E sent over 53,100 postcards to potential eligible FERA customers promoting the program and encouraging customers to sign up. Additionally, SDG&E sent 301 FERA packets to mobile home parks, including a letter describing the FERA program, a poster with program details and multiple postcards that property managers could distribute or leave in a shared space.

Email

In 2023, SDG&E sent 106,337 FERA bill comparison emails to non-CCA customers, which garnered a 59% open rate and a 4.8% click-through rate. 54,304 generic emails, with no bill comparison, were sent to CCA customers, garnering a 3.9% click-through rate and a 49% open rate. Additionally, SDG&E leveraged data from CalAmerican Water to send over 900 emails to potential FERA-eligible customers. To reengage customers who fell off CARE or FERA, a generic email was sent to over 43,000 customers encouraging them to sign up for FERA.

Digital

SDG&E used an integrated online strategy to increase awareness and drive online submissions by using paid search and paid social. SDG&E digital ads were seen over 14 million times (impressions) throughout the year, with more than 62,000 customers clicking through to the FERA Program online application. Below is a breakdown of the platforms where ads ran and their performance.

FERA Digital Performance				
Tactic	Impressions	Clicks	CTR	Conversions⁷⁸
Display	5,224,481	7,516	0.14%	2,573
Display Linear RT	1,362,782	2,350	0.17%	-
Nextdoor	326,652	362	0.11%	-
3rd Party Email Marketing	188,679	3,693	1.96%	-
YouTube	865,263	213	-	-
Streaming Audio	820,003	41	-	54
Paid Search	27,882	4,050	14.53%	93
Google Display Network	1,773,693	13,135	0.74%	5
Meta	2,907,275	29,148	1.00%	-
Reddit	760,796	2,103	0.28%	-
Total	14,257,506	62,611	0.47%	2,725

Social Media

FERA messaging to promote awareness and encourage enrollment was routinely included in SDG&E organic Facebook, Twitter, Instagram, and Nextdoor Customer Assistance Programs posts, which include FERA, CARE, and ESA Programs.

Partner Education & Outreach

FERA Capitation Agencies

As stated above, SDG&E partners with 22 social service agencies to help reach and enroll the hardest-to-reach customers. The partnering organizations are in diverse low-income communities serving multicultural/multilingual, access and functional needs, and Limited

⁷⁸ Not all tactics report on conversions and some tactics do not allow for a tracking pixel to be placed.

English Proficient (LEP) audiences. These partners contributed to 23 FERA program enrollments in 2023.

Energy Solutions Partner Network

As previously mentioned, SDG&E works closely with a network of community-based organizations and other external groups to connect customers with programs and solutions related to company offerings. FERA is currently promoted in all outreach activities including events, presentations, social media messaging and training with SDG&E's Energy Solutions Partner Network. These engagement efforts included over 400 events and events and presentations in 2023. This year, there were two enrollments in FERA and one recertification from this Network. The County of San Diego HHSA is also part of the Energy Solutions Partner Network and received eight applications in FERA, and seven enrollments in 2023.

Community Engagement

Events, Presentations, Workshops

Community outreach and engagement allow SDG&E to connect and directly engage customers with energy-saving solutions including FERA in the communities where they work and live. SDG&E has established relationships with non-profit organizations to deliver presentations, workshops, trainings, and participate at community events to assist SDG&E in securing enrollments through an organization that customers trust.

With these groups and the Energy Solutions Partner Network mentioned above, SDG&E participated in over 500 events, including more than 45 multicultural events, presentations, and workshops to educate and reach over 98,000 people in the community.

Branch Offices and Customer Care Centers

SDG&E's Customer Care Centers assist customers with a variety of energy inquiries each year via phone and chat. Customers are provided information about the FERA Program in both English and Spanish while waiting to speak with an Energy Service Specialist (ESS) via the Interactive Voice Recognition (IVR) System. Additionally, the outreach team collaborates with the branch offices and bill payment locations to educate customers on programs and services and assists customers with completing the online application during the branch office visit if needed during peak times of year. If a customer states that they are not qualified for the CARE or ESA Programs, the ESS will offer the FERA program and explain the income guidelines and current certification requirements.

Direct Marketing

Outbound Calls

THG utilized the data analysis from the FERA prospect list and continued an outbound call campaign to reach out to potentially eligible customers who live in SDG&E's service territory. THG's outbound call campaign (Live Call Campaign) also included a FERA Recertification Campaign. For 2023, the THG Live Call Campaign and FERA Recertification Campaign efforts resulted in 1,037 completed FERA applications, contributing to 987 new FERA enrollments, and 12 FERA recertifications.

4.3.2 Discuss Each of the Following:

4.3.2.1 How FERA customer data and other relevant program information is shared within the utility, for example, between its Energy Savings Assistance Program and other appropriate low-income programs.

When an online enrollment or recertification for the FERA Program is received, an ESA lead is automatically created if the customer is determined to be eligible based on the prior treated date. Upon eligible income verification for the FERA Program, an ESA lead is

automatically created labeled as “FERA Income Certified,” to notify the ESA implementer that the income eligibility process is not required during the in-home assessment. Similarly, the ESA eligibility information is sent to the FERA Program system once an ESA enrollment is received. The FERA Program system determines if the customer will be auto-enrolled, income certified, or recertified based on their current FERA status.

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

SDG&E’s FERA Program faces barriers to program participation and must constantly evaluate and sometimes shift its focus to determine ways to counteract these challenges. The main barrier to program participation is identifying FERA-eligible customers. Although SDG&E receives estimated eligible population counts annually, it is challenging to find FERA-eligible customers to apply for the program due to its narrow income eligibility requirements. Additionally, program enrollment is impacted by the significant attrition seen because of high non-response rates in recertification and PEV.

To increase program enrollment and mitigate barriers related to participation, SDG&E implemented various new marketing and outreach tactics in 2023 such as leveraging customer lists from third parties and re-engaging customers who were previously enrolled in FERA. Further information regarding marketing and outreach tactics can be found above.

To learn more about SDG&E’s customers’ experience with the FERA program and to gain a better understanding of barriers to FERA enrollment SDG&E launched its first FERA customer satisfaction survey in 2023. The survey was distributed to 178 program participants. The survey results revealed that most participants are satisfied with the FERA Program (86%). The survey also provided the following insights:

- The most-common way respondents say they first learned about FERA is by phone call;

- More than a third say they received an email from SDG&E about the FERA program (34%);
- Email is the most-preferred method for receiving information for programs like FERA;
- A large majority say the enrollment process was easy (83%);
- A vast majority say they would submit income verification if needed (89%);
- The most-preferred methods for renewal are using a link in an email from SDG&E or going online to renew; and
- Nearly two-thirds of respondents want a higher level of interaction with SDG&E than just sending their bill (they want access to their energy usage/costs or even recommendations about managing their usage). These insights will inform SDG&E in future marketing and outreach initiatives and consider customer communication preferences and enrollment application access.

4.4 Processing FERA Applications

4.4.1 Processing Self-Certification and Self-Recertification Applications (individual and sub-metered customers)

4.4.1.1 Provide the total number of utility and third-party FERA self-certification and self-recertification applications provided, received, approved, denied, pending/never completed, or duplicates for the reporting period.

See data contained in FERA Table 4A – Self-Certifications and Self-Recertifications Applications in Appendix G.

4.4.2 Processing Random Post-Enrollment Verification Requests

4.4.2.1 Provide the total number of verifications requested, received, approved, denied, pending/never completed, or duplicates, for the reporting period.

See data contained in FERA Table 4B – Post-Enrollment Verification in Appendix G.

4.5 Program Management

4.5.1 Discuss Issues and/or Events That Significantly Affected Program Management In the Reporting Period and How These Were Addressed.

As mentioned above, FERA program enrollment challenges for 2023 included a high attrition rate due to a high non-response rate towards marketing communications. Additionally, FERA’s estimated eligible population posed a challenge in targeting and enrolling eligible participants.

4.5.2 Post Enrollment Verification to Provide Proof of Income.

SDG&E selects between 3% and 6% of the FERA-eligible enrolled customers each year for the PEV process. A probability score is applied to each account using Commission-approved Probability Model. Each month, accounts are randomly selected for PEV based on their probability score. A lower score suggests that the customer is less likely to be eligible. A customer selected for PEV must provide documentation of eligibility for continued participation in the FERA Program. The customer may satisfy this requirement by providing proof of earnings as determined by household member count and household income.

SDG&E's customers are given 90 days to respond to a PEV request before they are removed from the FERA Program. If the customer provides acceptable documentation (even if responding after the deadline), they can remain enrolled or be re-enrolled in the FERA Program.

5. Fund Shifting

5.1 Report ESA Program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

During 2023, SDG&E shifted ESA funds in accordance with the rules set forth in D.21-06-015, which granted the IOUs authority to shift funds between ESA Program categories and fuel type within the program year as shown in ESA Table 11 of the 2023 Low Income Annual Report Program Tables. SDG&E used excess funds from the Domestic Hot Water and Lighting categories to cover \$924,580 of overages in the Customer Enrollment category. In addition, SDG&E used excess funds from the Enclosure category to cover \$948,547 of overages in the Implementer Compensation category. SDG&E also used excess funds from the HVAC Electric category to cover \$608,509 of overages in the HVAC Gas category. Lastly, SDG&E used excess

funds from the Training Center category to cover \$67,462 of overages in the Inspections category.

5.2 Report CARE Program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

Pursuant to D.21-06-015, during 2023, SDG&E shifted CARE funds between CARE Program categories within the program year. SDG&E used excess funds from the Outreach and IT Programming categories to cover \$1,211,704 of overages in the Processing, Certification, Recertification category. Additionally, SDG&E used excess funds from the General Administration category to cover \$13,739 of overages in the CHANGES category.

5.3 Report FERA Program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

During 2023, SDG&E shifted FERA funds in accordance with the rules set forth in D.21-06-015, which granted the IOUs authority to shift funds between FERA Program categories within the program year. SDG&E used excess funds from the Measurement & Evaluation category to cover a total of \$37,034 in overages in the Marketing, Education, & Outreach; Processing, Certification, Recertification; Post Enrollment Verification; and Regulatory Compliance categories.

5.4 Was there any ESA Program, CARE Program or FERA Program fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 10.5.8.2 of D.21-06-015?

No, there was no ESA Program, CARE Program, or FERA Program fund shifting activity that occurred that falls outside the rules laid out in Section 10.5.8.2 of D.21-06-015.

COMMONLY USED ACRONYMS

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

PY	Program Year
SASH	Single Family Affordable Homes
SCE	Southern California Edison Company
SDG&E	San Diego Gas & Electric Company
SoCalGas	Southern California Gas Company
SOMAH	Solar on Multifamily Affordable Housing
SPOC	Single Point of Contact
SSI	Supplemental Security Income
SSD	Supplemental Security Disability
SSP	Social Security Pension
SWG	Sub-Working Group
TDD	Telecommunications Device for the Deaf
TOU	Time of Use
TRC	Total Resource Cost Test
UAS	Universal Application System
UC	Utility Costs
WET	Workforce, Education, and Training
WG	Working Group

Appendix A – Low Income Programs 2023 Ethnic Media Costs

Multicultural Marketing		
CARE/ESA/FERA-2023		
Print		
Audience	Impressions	Total Spend
Spanish	1,580,323	\$ 18,066.00
Vietnamese	90,000	\$ 2,000.00
Filipino	375,000	\$ 3,960.00
Black	325,000	\$ 5,093.00
Totals	2,370,323	\$ 29,119.00
Television/OTT		
Audience	Impressions	Total Spend
Spanish	3,551,205	\$ 62,421.00
Black	202,384	\$ 6,250.00
AAPI	202,404	\$ 6,250.00
	3,955,993	\$ 74,921.00
OOH		
Audience	Impressions	Total Spend
Spanish	1,281,386	\$ 17,889.00
Black	316,747	\$ 4,422.00
	1,598,133	\$ 22,311.00
Digital		
Audience	Impressions	Total Spend
Spanish digital	8,851,039	\$ 86,174.00
Spanish paid social	291,991	\$ 2,999.71
Spanish search/google display	675,289	\$ 9,488.53
Chinese	-	\$ 2,880.00
	9,818,319	\$ 101,542.24
Total 2023 Multicultural Spend	16,775,488	\$ 212,525.00

Appendix B – TV Samples

TV Spot :30 Seconds English: <https://www.youtube.com/watch?v=nkFmlTNiS3Y>



TV Spot :30 Seconds Spanish: <https://www.youtube.com/watch?v=03TrERZ2zIo>



Appendix C – ESA Email Sample





Receive home improvements at no cost

See if you qualify

APPLY NOW
[LINKS.MKT2181.COM]



Through the Energy Savings Assistance Program, our contractors will visit qualified homes to provide no-cost energy-efficient improvements. It doesn't matter if you rent or own.

Some of the improvements you may receive include:

- New, energy-efficient lighting
- Repair or replacement of doors
- Replacement of qualified appliances*
- Insulation, weather stripping and caulking

ESA income guidelines have increased.
If you didn't qualify before, you may now!

START APPLICATION
[LINKS.MKT2181.COM]

To learn more, connect at sdge.com/esap [links.mkt2181.com]
or schedule an appointment by calling 1-866-597-0597



Appendix D - Print Examples



NHẬN HỖ TRỢ VỀ NĂNG LƯỢNG
Tiết kiệm 30% hóa đơn năng lượng

 Thỉnh thoảng, mọi người có thể sử dụng hết tài năng lượng. Đó là lý do tại sao SDGE cung cấp CARE — một chương trình giảm giá tiết kiệm hóa đơn năng lượng của bạn. Trình độ điều kiện được xác định bởi thu nhập hộ gia đình và số người trong nhà của bạn. Đăng ký rất dễ dàng và bảo mật.

Tìm hiểu thêm và xem liệu bạn có đủ điều kiện tại sdge.com/CARE

 SDGE

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RECIBA AYUDA PARA LA ENERGÍA
Ahorre un 18% en electricidad

 Estos son tiempos difíciles para muchos en nuestra comunidad. Por eso SDG&E ofrece FERA, un programa de descuentos para hogares de tres o más personas que tengan dificultades para pagar las facturas. Incluso si nunca ha calificado para recibir asistencia puede ser elegible ahora. La solicitud es rápida, fácil y completamente confidencial.

Obtenga más información y vea si califica en sdge.com/FEAR

 SDGE

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GET AN ENERGY ASSIST
With energy-saving home improvements at no cost

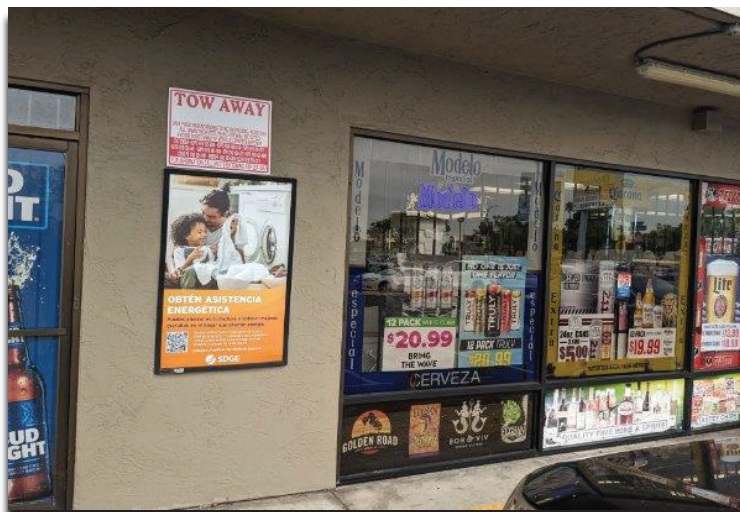
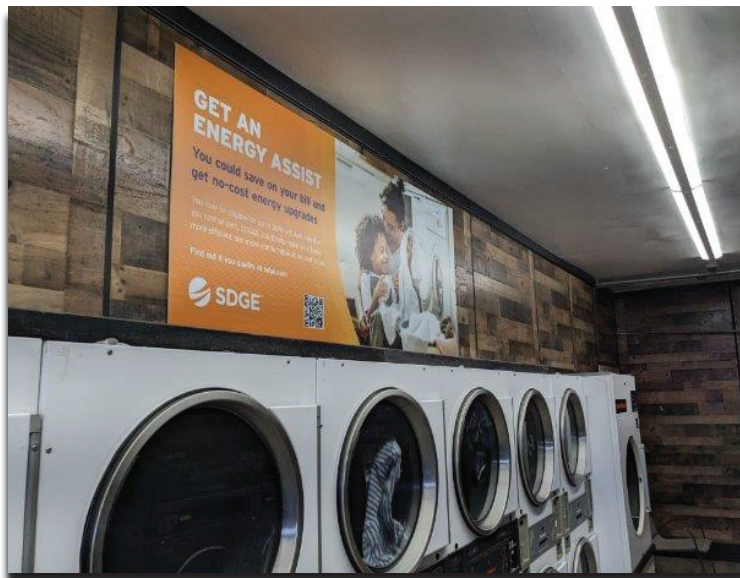
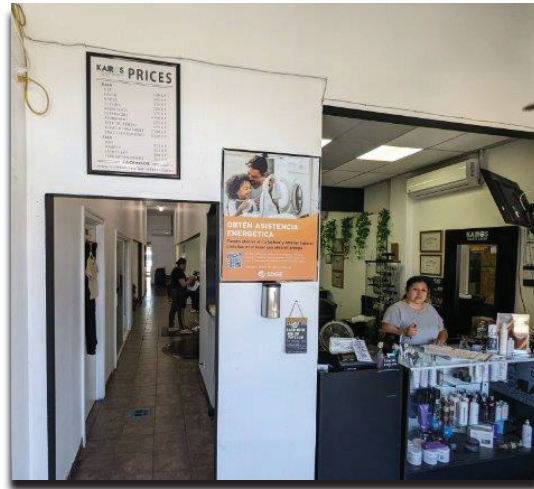
 The Energy Savings Assistance Program from SDG&E offers special home improvements to those who qualify. You could receive no-cost energy-efficient upgrades that'll make your home more comfortable, more efficient and more budget-friendly for years to come.

Learn more and see if you're eligible at sdge.com/ESA

 SDGE

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Appendix E – Out-of-Home Examples



Appendix F – CARE and FERA Bill Comparison Samples

 **SDGE™**

March 26, 2024

[Redacted Address]

Account number: [Redacted]

Dear [Redacted],

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

BILL AMOUNT

\$1,343

WITHOUT discount

→

BILL AMOUNT

\$940

WITH discount*

Based on 3370 kilowatt hours over the last 12 months

Based on your energy use, you could have saved approximately **\$403*** on your bill. Get your savings now. Sign up at sdge.com/care or call 1-877-646-5525 to see if you qualify.

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

Sincerely,


Pedro Ramirez
Customer Assistance Programs

Qualification is based on income or participation in certain public assistance programs. High energy use could result in removal from the program.
*Based on your energy use over the past 12 months with an average CARE discount of 30% applied. Seasonal rates may not be reflected in calculated discount.

000000

 **SDGE™**

March 26, 2024

[Redacted Address]

Account number: [Redacted]

Dear [Redacted],

SDG&E recognizes that this is still a challenging time for many customers and wants to help. Even if you have never qualified for assistance before, you may be eligible now.

Your household may qualify for the FERA discount, which can save you 18% on your electric bill. Here's how much you could have saved over the last 12 months on your electric use at [Redacted].

BILL AMOUNT

\$2,358

WITHOUT discount

→

BILL AMOUNT

\$1,934

WITH discount*

Based on your electric use over the last 12 months, you could have saved approximately **\$424.*** Get your savings now. Applying is quick and confidential. Sign up at sdge.com/FEAR.

Qualified residential FERA customers may also be eligible for financial assistance to help reduce outstanding account balances through SDG&E's Arrearage Management Payment (AMP) Plan. For details visit sdge.com/FEAR or call 1-877-646-5525 to see if you qualify.

Sincerely,


Pedro Ramirez
Customer Assistance Programs

*Based on your personal electric use over the past 12 months with a FERA electric discount of 18% applied. Seasonal rates may not be reflected in calculated discount.
Qualification is based on household income.

000000

Amended Appendix G - ESA, CARE, and FERA Program Tables

Amended Summary Highlights – ESA, CARE, and FERA Programs

Amended ESA Program Summary Table 1 – Expenses and Energy and Demand Savings

Summary

ESA Program – Table 1 - Main ESA Program (SF, MH, MF In-Unit) Overall Program Expenses

ESA Program – Table 1A – Program Expenses Summary – MFWB Program Expenses

ESA Program – Table 1A-1 – MFWB Program Expenses

ESA Program – Table 1A-2 – Pilot Plus and Pilot Deep Program Expenses

ESA Program – Table 1A-3 – Building Electrification Program Expenses

ESA Program – Table 1A-4 – Clean Energy Homes Program Expenses

ESA Program – Table 1A-5 – CSD Leveraging Program Expenses

Amended ESA Program – Table 2 – Main ESA Program Expenses & Energy Savings by

Measures Installed

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

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

ESA Program – Table 2C – ESA Pilot Plus and Pilot Deep Expenses & Energy Savings by

Measures Installed

ESA Program – Table 2D – ESA Building Electrification Expenses & Energy Savings by

Measures Installed (SCE Only)

ESA Program – Table 2E – ESA Clean Energy Homes Expenses & Energy Savings by Measures

Installed (SCE Only)

ESA Program – Table 2F – ESA CSD Leveraging Expenses & Energy Savings by Measures

Installed

Amended ESA Program – Table 3 – ESA Program Cost Effectiveness

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

ESA Program – Table 5 – ESA Direct Purchases & Installation Contractors

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

ESA Program – Table 7 – ESA Expenditures Recorded by Cost Element

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

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

(SCE Only)

Amended ESA Program – Table 10 – Bill Savings Calculations by Program Year

ESA Program – Table 11 – ESA Fund Shifting

ESA Program – Table 12 – ESA Categorical and Other Enrollment

ESA Program – Table 13A – ESA Leveraging and Integration

ESA Program – Table 13B – ESA Clean Energy Referral, Leveraging, and Coordination

ESA Program – Table 14 – ESA Expenditures for Pilots and Studies

ESA Program – Table 15 – ESAP Tribal Outreach

Amended ESA Program – Table 16 – ESA Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions

CARE Program – Table 1 – CARE Overall Program Expenses

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

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

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

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

Amended CARE Program – Table 5 – CARE Enrollment by County

Amended CARE Program – Table 6 – CARE Recertification Results

CARE Program – Table 7 – CARE Capitation Contractors

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

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

CARE Program – Table 10 – CARE Surcharge & Revenue

CARE Program – Table 11 – CARE Capitation Applications

CARE Program – Table 12 – CARE Expansion Program

CARE Program – Table 13 – CARE High Usage Verification Results

CARE Program – Table 14 – CARE Customer Usage and ESA Program Treatment

CARE Program – Table 15 – CARE Categorical Enrollment

CARE Program – Table 16 – CARE and Disadvantaged Communities Enrollment Rate for Zip Codes

FERA Program – Table 1 – FERA Overall Program Expenses

Amended FERA Program – Table 2 – FERA Enrollment, Recertification, Attrition, and Penetration

FERA Program – Table 3A – FERA Post Enrollment Verification Results (Model)

FERA Program – Table 3B – FERA Post Enrollment Verification Results (Electric Only High Usage)

FERA Program – Table 4A – FERA Self-Certification and Self-Recertification Applications

FERA Program – Table 4B – FERA Post-Enrollment Verification

FERA Program – Table 5 – FERA Enrollment by County

FERA Program – Table 6 – FERA Recertification Results

FERA Program – Table 7 – FERA Capitation Contractors

FERA Program – Table 8 – FERA Average Monthly Usage & Bill

**Energy Savings Assistance (ESA) Program
California Alternate Rates for Energy (CARE) Program and
Family Electric Rate Assistance (FERA) Program
2023 Summary Highlights**

ESA Program			
2023 Energy Savings Assistance Program Summary ¹			
2023	Authorized / Forecasted Planning Assumptions	Actual	%
Budget	\$ 31,566,271	\$ 16,766,588	53%
Funded from Pre-2023 Unspent Funds ²	\$ 4,207,031	\$ 1,955,093	46%
Summary Homes Treated	11,711	4,533	39%
Summary kWh Saved	2,623,811	949,853	36%
Summary kW Demand Reduced	166	110	66%
Summary Terms Saved	100,605	33,122	33%

¹ This includes all programs for the reporting period Main ESA, MF In-Unit, MF CAM, MFWB, Pilot Plus and Pilot Deep, Building Electrification, Clean Energy Homes, CSD Leveraging. See ESA Summary Table 1 for budget and expense breakdown by program.

² Pre-2023 unspent funds is only applicable to MF CAM and Pilot Plus and Pilot Deep.

Decision (D.) 21-06-015 directs the IOUs to use unspent and uncommitted MF CAM funds until transition to the Multifamily Whole Building program is implemented in 2023. The unspent funds remaining at the end of December 31, 2022 was \$2,808,028.

In accordance with D.21-06-015, OP 181, funds not expended in previous program years will be available for the Pilot Plus & Pilot Deep throughout the 2022-2026 program cycle. The unspent funds remaining at the end of December 31, 2022 was \$1,399,003.

CARE Program			
2023 CARE Program Summary			
2023	Authorized Budget	Actual	%
Administrative Expenses	\$ 6,922,453	\$ 6,166,953	89%
Subsidies	\$ 202,685,986	\$ 254,054,642	125%
Service Establishment Charge	\$ -	\$ -	n/a
Total Program Costs and Discounts	\$ 209,608,439	\$ 260,221,595	124%
2023 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc.	Self Certified as Income or Categorically Eligible	Self Certified as Recertification
Method	784	66,468	83,908
2023 CARE-Enrollment Rate	Estimated Eligible Participants	Participants	Enrollment Rate
Total Enrolled	301,966	336,819	112%

FERA Program			
2023 FERA Program Summary			
2023	Authorized Budget	Actual	%
Administrative Expenses	\$ 612,393	\$ 520,090	85%
Subsidies	\$ 4,170,665	\$ 4,670,344	112%
Service Establishment Charge	\$ -	\$ -	n/a
Total Program Costs and Discounts	\$ 4,783,058	\$ 5,190,434	109%
2023 FERA New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc.	Self Certified as Income or Categorically Eligible	Self Certified as Recertification
Method	40	3,017	930
2023 FERA-Enrollment Rate	Estimated Eligible Participants	Participants	Enrollment Rate
Total Enrolled	42,980	10,428	24%

ESA Summary Table 1 - Expenses and Energy and Demand Savings Summary
San Diego Gas & Electric
Program Year 2023 Annual Report

ESA Summary Table 1A - Expenses Summary									
ESA Program Expenses:	Authorized Budget			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Main Program (SF and MH)	\$ 8,977,351	\$ 8,675,365	\$ 17,652,716	\$ 5,156,261	\$ 6,796,586	\$ 11,952,848	57%	78%	68%
ESA Multifamily In-Unit	\$ 1,129,217	\$ 1,036,894	\$ 2,166,111	\$ 937,864	\$ 861,184	\$ 1,799,048	83%	83%	83%
ESA Multifamily Common Area Measures	\$ 2,540,893	\$ 267,135	\$ 2,808,028	\$ 1,769,100	\$ 185,993	\$ 1,955,093	70%	70%	70%
ESA Multifamily Whole Building	\$ 2,849,238	\$ 2,849,232	\$ 5,698,470	\$ 479,389	\$ 479,389	\$ 958,778	17%	17%	17%
ESA Pilot Plus and Pilot Deep	\$ 1,462,843	\$ 1,462,843	\$ 2,925,686	\$ 50,410	\$ 50,410	\$ 100,821	3%	3%	3%
Building Electrification Retrofit Pilot ¹	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Clean Energy Homes New Construction Pilot ¹	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
CSD Leveraging	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
SASH and MASH Unspent Funds ²	\$ 315,260	\$ -	\$ 315,260	\$ -	\$ -	\$ -	0%	0%	0%
ESA Program TOTAL	\$ 17,274,802	\$ 14,291,469	\$ 31,566,271	\$ 8,393,025	\$ 8,373,562	\$ 16,766,588	49%	59%	53%

¹ Pilots are applicable to SCE only.

² Consistent with OP 12 of D.15-01-027, any remaining unspent and unencumbered SASH/MASH program funds should be used for measures in low income energy efficiency programs in residential housing that benefit ratepayers. On October 31, 2023, SDG&E submitted AL 4285-E requesting transfer of unspent SASH/MASH funds to the ESA programs. The AL became effective on November 30, 2023. The SASH & MASH unspent funds were transferred to the Low Income Energy Efficiency Balancing Account (LIEEBA) - Electric in December 2023. The unspent funds transferred will be used primarily to support the Main ESA Program implementation.

ESA Summary Table 1B - Energy and Demand Savings									
ESA Program:	Authorized / Forecasted Planning Assumptions			Actual			%		
	kWh	kW	Therms	kWh	kW	Therms	kWh	kW	Therms
ESA Main Program (SF and MH) ¹	1,997,137	166.00	74,629	613,206	64.00	9,133	31%	39%	12%
ESA Multifamily In-Unit ²	0	0.00	0	132,654	9.00	2,918	7%	5%	4%
ESA Multifamily Common Area Measures	200,000	0.00	3,600	203,993	37.24	21,071	102%	0%	585%
ESA Multifamily Whole Building	426,674	0.00	22,376	0	0.00	0	0%	0%	0%
ESA Pilot Plus and Pilot Deep	0	0.00	0	0	0.00	0	0%	0%	0%
Building Electrification Retrofit Pilot ³				0	0.00	0	0%	0%	0%
Clean Energy Homes New Construction Pilot ³							0%	0%	0%
CSD Leveraging				0	0.00	0	0%	0%	0%
ESA Program TOTAL	2,623,811	166.00	100,605	949,853	110.24	33,122	36%	66%	33%

¹ Energy and demand savings for PY 2023 includes ESA Main and MF In-Unit.

² The ESA Multifamily In-Unit energy and demand savings forecasts are included in the ESA Main Program category.

³ Pilots are applicable to SCE only.

ESA Table 1 - ESA Main (SF, MH, MF In-Unit) Overall Program Expenses
San Diego Gas & Electric
Program Year 2023 Annual Report

	2023 Authorized / Forecasted Budget ¹			2023 Annual Expenses			% of Budget Spent ²		
ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency									
Appliances	\$ 734,754	\$ 401,231	\$ 1,135,985	\$ 666,303	\$ 119,063	\$ 785,365	91%	30%	69%
Domestic Hot Water	\$ 44,312	\$ 1,432,767	\$ 1,477,079	\$ 25,060	\$ 810,282	\$ 835,342	57%	57%	57%
Enclosure	\$ 1,532,051	\$ 2,030,858	\$ 3,562,909	\$ 735,736	\$ 975,278	\$ 1,711,014	48%	48%	48%
HVAC	\$ 1,245,721	\$ 958,344	\$ 2,204,066	\$ 54,004	\$ 1,566,854	\$ 1,620,858	4%	163%	74%
Maintenance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Lighting	\$ 1,164,710	\$ -	\$ 1,164,710	\$ 247,276	\$ -	\$ 247,276	21%	0%	21%
Miscellaneous	\$ 403,638	\$ -	\$ 403,638	\$ 102,269	\$ -	\$ 102,269	25%	0%	25%
Customer Enrollment	\$ 795,677	\$ 795,677	\$ 1,591,354	\$ 1,257,967	\$ 1,257,967	\$ 2,515,934	158%	158%	158%
In Home Education	\$ 392,162	\$ 392,162	\$ 784,324	\$ 100,645	\$ 100,645	\$ 201,289	26%	26%	26%
Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Implementer Compensation	\$ -	\$ -	\$ -	\$ 474,274	\$ 474,274	\$ 948,547	0%	0%	0%
Energy Efficiency TOTAL	\$ 6,313,026	\$ 6,011,040	\$ 12,324,066	\$ 3,663,534	\$ 5,304,361	\$ 8,967,895	58%	88%	73%
Training Center	\$ 152,601	\$ 152,601	\$ 305,202	\$ 2,394	\$ 2,394	\$ 4,788	2%	2%	2%
Inspections	\$ 50,361	\$ 50,361	\$ 100,722	\$ 84,092	\$ 84,092	\$ 168,184	167%	167%	167%
Marketing and Outreach	\$ 753,174	\$ 753,174	\$ 1,506,347	\$ 417,133	\$ 417,133	\$ 834,266	55%	55%	55%
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Measurement and Evaluation Studies	\$ 62,500	\$ 62,500	\$ 125,000	\$ 2,103	\$ 2,103	\$ 4,206	3%	3%	3%
Regulatory Compliance ³	\$ 150,326	\$ 150,326	\$ 300,652	\$ 125,814	\$ 125,814	\$ 251,628	84%	84%	84%
General Administration ³	\$ 1,305,136	\$ 1,305,136	\$ 2,610,272	\$ 756,259	\$ 756,258	\$ 1,512,517	58%	58%	58%
CPUC Energy Division	\$ 27,354	\$ 27,354	\$ 54,707	\$ 12,401	\$ 12,401	\$ 24,803	45%	45%	45%
SPOC	\$ 162,874	\$ 162,874	\$ 325,748	\$ 92,531	\$ 92,031	\$ 184,562	57%	57%	57%
Administration Subtotal	\$ 2,664,325	\$ 2,664,325	\$ 5,328,650	\$ 1,492,728	\$ 1,492,225	\$ 2,984,953	56%	56%	56%
TOTAL PROGRAM COSTS ¹	\$ 8,977,351	\$ 8,675,365	\$ 17,652,716	\$ 5,156,261	\$ 6,796,586	\$ 11,952,848	57%	78%	68%
Funded Outside of ESA Program Budget									
Indirect Costs				\$ 506,250	\$ 505,178	\$ 1,011,428			
NGAT Costs		\$ 468,000	\$ 468,000		\$ 380,343	\$ 380,343		81%	81%

¹ Budget authorized in D.21-06-015, Attachment 1, Table 11 is \$27,043,980. The total authorized budget in ESA Table 1 of \$17,652,716 excludes ESA MFWB, ESA In-Unit, and ESA PPPD budgets of \$5,698,470, \$2,166,111, and \$1,526,683, respectively. Energy Efficiency category budgets are based on the Low Income Application forecast, with adjustments made to support the current program design. See ESA Table 1A for ESA MFWB, ESA In-Unit, and ESA PPPD program expenditures.

² Any fund shifts between the categories and fuel type are reflected in ESA Table 11.

³ OP 112 of D.21-06-015 states that the IOU's ESA program administrative expenses are capped at either 10% of total program costs, or the Utility's historical five year average spend on administrative costs as a percentage of total program costs, whichever is greater. The use of the historical five-year average spend will be phased out such that the Utilities must propose to spend no more than 10 percent of total program costs on administrative costs starting in program year 2024. The definition and categorization of administrative cost for the ESA program will be consistent with that of the main energy efficiency program. SDG&E's five year historical average (2015-2019) administrative cap calculated in D.20.08-033 was 18 percent. For program year 2023, SDG&E's administrative percent resulted in approximately 11 percent.

**ESA Table 1A - Program Expenses Summary
San Diego Gas & Electric
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ESA Table 1A-1 - Multifamily Whole Building Program Expenses

ESA Program (MFWB):	2023 Authorized / Forecasted Budget			2023 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Multifamily In-Unit ¹	\$ 1,129,217	\$ 1,036,894	\$ 2,166,111	\$ 937,864	\$ 861,184	\$ 1,799,048	83%	83%	83%
ESA Multifamily Common Area Measures ²	\$ 2,540,893	\$ 267,135	\$ 2,808,028	\$ 1,769,100	\$ 185,993	\$ 1,955,093	70%	70%	70%
ESA Multifamily Whole Building ³	\$ 2,849,238	\$ 2,849,232	\$ 5,698,470	\$ 479,389	\$ 479,389	\$ 958,778	17%	17%	17%
TOTAL	\$ 6,519,348	\$ 4,153,261	\$ 10,672,609	\$ 3,186,354	\$ 1,526,566	\$ 4,712,920	49%	37%	44%

¹ Budget authorized in Advice Letter 4115-E / 3144-G. Also, see footnote 4 for additional information.

² D.21-06-015 directs the IOUs to carry-forward all unspent and uncommitted ESA Common Area Measures funding as of June 30, 2021 into the remainder of program year 2023. The unspent committed funds remaining at the end of December 31, 2022 was \$2,808,028 to be used for 2023.

³ MFWB authorized budget of \$5,698,470 excludes \$2,166,111 in multifamily funds to continue In-Unit treatment through the Main ESA Program until the MFWB program was launched on July 1, 2023 (see footnote 1). Total Multifamily In-Unit, and Multifamily Whole Building 2023 authorized budget is \$7,864,581 per D.21-06-015, Attachment 1, Table 11.

ESA Table 1A-2 - Pilot Plus and Pilot Deep Expenses

	2023 Authorized / Forecasted Budget ⁴			2023 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Pilot Plus and Pilot Deep Program	\$ 1,462,843	\$ 1,462,843	\$ 2,925,686	\$ 50,410	\$ 50,410	\$ 100,821	3%	3%	3%
TOTAL	\$ 1,462,843	\$ 1,462,843	\$ 2,925,686	\$ 50,410	\$ 50,410	\$ 100,821	3%	3%	3%

⁴ Authorized budget of \$1,526,683 in 2023 per D.21-06-015, Attachment 2, adjusted for 2022 unspent funds of \$1,399,003. In accordance with D.21-06-015, OP 181, funds not expended in previous program years will be available for the Pilot Plus & Pilot Deep throughout the 2022-2026 program cycle.

ESA Table 1A-3 - Building Electrification Expenses

	2023 Authorized / Forecasted Budget			2023 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Building Electrification Program			\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%

ESA Table 1A-4 - Clean Energy Homes Expenses

	2022 Authorized / Forecasted Budget			2023 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Clean Energy Homes Program			\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%

ESA Table 1A-5 - Leveraging - CSD Expenses

	2023 Authorized / Forecasted Budget			2023 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Program Leveraging - CSD			\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%

ESA Table 2 - ESA Main (SF, MH, MF In-Unit) Expenses and Energy Savings by Measures Installed
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ESA Main Program Total											
Measures	2023 Completed & Expensed Installation										
	Basic	Plus	Units	Quantity Installed	kWh ⁴ (Annual)	kW ⁴ (Annual)	Therms ⁴ (Annual)	Expenses (\$)	% of Expenditures	Effective Useful Life (EUL)	2023 Total Measure Life Cycle Bill Savings
Appliances											
High Efficiency Clothes Washer		X	Each	150	714	0	2,523	\$ 153,815	1.7%	11	\$ 49,376
Refrigerator		X	Each	528	296,333	36	-	\$ 635,033	7.0%	14	\$ 554,326
Microwave			Each	-	-	-	-	\$ -	0.0%		\$ -
New - Clothes Dryer		X	Each	96	1,598	0	235	\$ 120,597	1.3%	12	\$ 7,480
New - Dishwasher		X	Each	-	-	-	-	\$ -	0.0%	11	\$ -
New - Freezer			Each	-	-	-	-	\$ -	0.0%	11	\$ -
Domestic Hot Water											
Other Domestic Hot Water ⁵	X		Home	2,595	19,615	4	19,377	\$ 348,676	3.8%	10	\$ 275,442
Water Heater Tank and Pipe Insulation		X	Home	43	-	-	(157)	\$ 4,303	0.0%	3.67	\$ (1,003)
Water Heater Repair/Replacement		X	Each	195	-	-	841	\$ 534,324	5.9%	11	\$ 16,109
Combined Showerhead/TSV	X		Each	6	-	-	30	\$ 502	0.0%	10	\$ 520
Heat Pump Water Heater		X	Each	-	-	-	-	\$ -	0.0%	10	\$ -
Tub Diverter/ Tub Spout	X		Each	12	378	0	85	\$ 1,501	0.0%	10	\$ 1,976
Thermostat-controlled Shower Valve	X		Each	-	-	-	-	\$ -	0.0%	3.3	\$ -
Enclosure											
Air Sealing ¹		X	Home	3,205	70,528	15	(127)	\$ 1,693,239	18.6%	3	\$ 27,607
Caulking			Home	-	-	-	-	\$ -	0.0%		\$ -
Attic Insulation		X	Home	86	7,740	1	2,730	\$ 134,716	1.5%	6.7	\$ 38,779
HVAC											
FAU Standing Pilot Conversion			Each	-	-	-	-	\$ -	0.0%		\$ -
Furnace Repair/Replacement ⁶		X	Each	636	-	-	(13,579)	\$ 1,577,882	17.3%	20	\$ (472,903)
Room A/C Replacement		X	Each	22	(8,189)	(1)	-	\$ 20,017	0.2%	9	\$ (9,848)
Central A/C replacement			Each	-	-	-	-	\$ -	0.0%		\$ -
Heat Pump Replacement			Each	-	-	-	-	\$ -	0.0%		\$ -
Evaporative Cooler (Replacement)			Each	-	-	-	-	\$ -	0.0%		\$ -
Evaporative Cooler (Installation)			Each	-	-	-	-	\$ -	0.0%		\$ -
Duct Test and Seal			Home	-	-	-	-	\$ -	0.0%	3	\$ -
Energy Efficient Fan Control		X	Home	-	-	-	-	\$ -	0.0%		\$ -
Prescriptive Duct Sealing			Home	-	-	-	-	\$ -	0.0%		\$ -
High Efficiency Forced Air Unit (HE FAU)			Home	-	-	-	-	\$ -	0.0%		\$ -
A/C Time Delay			Home	-	-	-	-	\$ -	0.0%		\$ -
Smart Thermostat	X		Home	315	10,152	-	973	\$ 83,205	0.9%	9.1	\$ 27,770
Maintenance											
Furnace Clean and Tune			Home	-	-	-	-	\$ -	0.0%	3	\$ -
Central A/C Tune up			Home	-	-	-	-	\$ -	0.0%	3	\$ -
Lighting											
Interior Hard wired LED fixtures			Each	-	-	-	-	\$ -	0.0%	8.14	\$ -
Exterior Hard wired LED fixtures			Each	-	-	-	-	\$ -	0.0%	16	\$ -
LED Torchiere			Each	-	-	-	-	\$ -	0.0%	16	\$ -
Occupancy Sensor			Each	-	-	-	-	\$ -	0.0%		\$ -
LED Night Light			Each	-	-	-	-	\$ -	0.0%		\$ -
LED R/BR Lamps		X	Each	3,422	10,334	1	(176)	\$ 59,372	0.7%	16	\$ 17,185
LED A-Lamps		X	Each	18,664	39,568	5	(703)	\$ 220,608	2.4%	16	\$ 65,011
Miscellaneous											
Pool Pumps		X	Each	-	-	-	-	\$ -	0.0%	10	\$ -
Smart Strip			Each	575	64,706	9	-	\$ 34,195	0.4%	1.67	\$ 14,438
Smart Strip Tier II			Each	1,230	232,382	3	(0)	\$ 102,853	1.1%	1.67	\$ 51,852
Pilots											
Customer Enrollment [8]											
ESA Outreach & Assessment			Home	8,782				\$ 3,128,153	34.4%		
ESA In-Home Energy Education			Home	8,777				\$ 251,812	2.8%		
Total Savings/Expenditures											
					745,860	73	12,052	\$ 9,104,802	100%		
Total Households Weatherized²											
				3,217							
Households Treated											
- Single Family Households Treated			Home	3,408							
- Multi-family Households Treated			Home	901							
- Mobile Homes Treated			Home	224							
Total Number of Households Treated			Home	4,533							
# Eligible Households to be Treated for PY³			Home	11,711							
% of Households Treated			%	39%							
- Master-Meter Households Treated			Home	92							

ESA Main Program			Year to Date Expenses ⁷		
			Electric	Gas	Total
Administration			\$ 1,717,364	\$ 1,716,861	\$ 3,434,224
Direct Implementation (Non-Incentive)			\$ 606,435	\$ 606,435	\$ 1,212,870
Direct Implementation			\$ 3,770,327	\$ 5,334,475	\$ 9,104,802
Total ESA MAIN COSTS			\$ 6,094,126	\$ 7,657,770	\$ 13,751,896

<<Includes measures costs

¹ Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs.

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

³ Based on D.21-06-015 Attachment 1, Table 6 targets.

⁴ All savings are calculated based on the following sources: Impact Evaluation Program Years 2015-2017, eTRM or ESA workpapers.

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

⁶ Savings for HVAC measures vary by CZ and the total is inclusive of the variations.

⁷ Total ESA Main Costs includes ESA Main Program (SF and MH) and Multi-family (MF) In-Unit. ESA MF In-Unit year to date expenses consisted of \$449,272 in Administration, \$264,323 in Direct Implementation (Non-Incentive), and \$1,085,454 in Direct Implementation. See ESA Table 1 and ESA Table 1A for the year to date expenses reported by program.

ESA Table 2A - ESA Multifamily Common Area Measures Expenses and Energy Savings by Measures Installed
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ESA Program - Multifamily Common Area Measures										
ESA MF CAM Measures ¹	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh ² (Annual)	kW ² (Annual)	Therms ² (Annual)	Expenses (\$)	% of Expenditure	Effective Useful Life (EUL)	2023 Total Measure Life Cycle Bill Savings
Appliances										
Domestic Hot Water										
Central Boiler**	Cap-kBTUh	6,938	-	-	-	\$ 21,618	\$ 1,281,358	74%	15	\$ 731,344
Pipe Insulation	Home	-	-	-	-	\$ -	\$ -	0%	7	\$ -
Faucet Aerator	Each	2	-	-	-	\$ 12	\$ 20	0%	7	\$ 183
Envelope										
HVAC⁵										
AC Tune-up**	Cap-Tons	-	-	-	-	\$ -	\$ -	0.0%		
Furnace Replacement**	Cap-kBTUh	-	-	-	-	\$ -	\$ -	0.0%		
HEAT Pump Split System**	Cap-Tons	-	-	-	-	\$ -	\$ -	0.0%		
HEAT Pump Split System	Each	15		533	0		\$ 108,191	6.2%	15	\$ 3,298
Programmable Thermostat	Each	4		3	-	1	\$ 1,453	0.1%	9	\$ 42
Lighting										
Exterior LED Lighting	Fixture	616		37,100	0	-	\$ 159,313	9.2%	6	\$ 109,525
Exterior LED Lighting - Pool	Lamp	-		-	-	-	\$ -	0.0%		\$ -
Interior LED Exit Sign	Fixture	5		49	0	(0)	\$ 817	0.0%	5	\$ 98
Interior LED Fixture	Fixture	762		143,406	35	(393)	\$ 134,350	7.7%	12	\$ 291,368
Interior LED Lighting	KiloLumen	5		66	0	(1)	\$ 722	0.0%	12	\$ 297
Interior LED Screw-in	Lamp	50		2,075	1	(7)	\$ 744	0.0%	5	\$ 4,199
Interior TLED Type A Lamps	Lamp	20		134	0	(2)	\$ 390	0.0%	5	\$ 257
Interior TLED Type C Lamps	Lamp	696		12,528	0	(158)	\$ 29,079	1.7%	8	\$ 39,140
Miscellaneous										
Tier-2 Smart Power Strip	Each	-		-	-	-	\$ -			
Variable Speed Pool Pump	Each	1		8,100	1	-	\$ 4,332		10	\$ 33,396
Ancillary Services⁴										
Audit		12	-	-	-	-	\$ 12,969			
Total	-	9,126	-	203,993	37	21,071	\$ 1,733,738			

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated	17
Subtotal of Master-metered Multifamily Properties Treated	10
Total Number of Multifamily Tenant Units w/in Properties Treated	735
Total Number of buildings w/in Properties Treated	60

ESA Program - MF CAM	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ 43,565	\$ 43,565	\$ 87,131
Direct Implementation (Non-Incentive)	\$ 73,597	\$ 73,597	\$ 147,194
Direct Implementation	\$ 1,651,937	\$ 68,831	\$ 1,720,768
TOTAL MF CAM COSTS⁶	\$ 1,769,100	\$ 185,993	\$ 1,955,093

<<Includes measures costs but excludes Audit costs of \$12,969 reported in table above.

¹ Measures are customized by each IOU. Measures list may change based on available information on both costs and benefits and may vary across climate zones.

² All savings are calculated based on the following sources: eTRM or ESA workpapers

³ Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings

⁴ Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.

⁵ Savings for HVAC measures vary by CZ and the total is inclusive of the variations.

⁶ Total MF CAM year to date program expenses are also reported in ESA Table 1A.

* Note: Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are income eligible based on CPUC income requirements of at or below 250% of the Federal Poverty Guidelines.

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

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

ESA Table 2B - ESA Southern Multifamily Whole Building - Expenses and Energy Savings by Measures Installed
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ESA Program - Multifamily Whole Building											
Year-To-Date Completed & Expensed Installation											
	Units (of Measure such as "each")	Measure Type (In-unit vs CAM/WB)	Quantity Installed	Number of Units for Cap-kBtU/h and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure	Effective Useful Life (EUL)	2023 Total Measure Life Cycle Bill Savings
Measures¹											
Appliances											
High Efficiency Clothes Washer	Each	In-Unit									
Refrigerators	Each	In-Unit									
Domestic Hot Water											
New: Non-Condensing Domestic Hot Water Boiler	Cap-kBtU/h	CAM/WB									
New: Condensing Domestic Hot Water Boiler	Cap-kBtU/h	CAM/WB									
Storage Water Heater	Cap-kBtU/h	CAM/WB									
Tankless Water Heater	Cap-kBtU/h	CAM/WB									
Heat Pump Water Heater	kW	CAM/WB									
Demand Control DHW Recirculation Pump	Each	CAM/WB									
Low flow Showerhead	Each	CAM/WB									
Faucet Aerator	Each	CAM/WB									
Other Hot Water	Household	In-Unit									
Thermostatic Tub Spout/Diverter	Each	In-Unit									
Water Heater Tank and Pipe Insulation	Household	In-Unit									
Water Heater Repair/Replacement	Household	In-Unit									
Heat Pump Water Heater	Each	In-Unit									
Hot Water Pipe Insulation	Each	CAM/WB									
Boiler Controls	Each	CAM/WB									
Envelope											
Whole Building Attic Insulation	Sq Ft	CAM/WB									
Wall Insulation Blow-in	Sq Ft	CAM/WB									
Windows	Sq Ft	CAM/WB									
Window Film	Sq Ft	CAM/WB									
Air Sealing	Household	In-Unit									
Attic Insulation	Household	In-Unit									
HVAC											
Air Conditioners Split System	Cap-Tons	CAM/WB									
Heat Pump Split System	Cap-Tons	CAM/WB									
New: Packaged Air Conditioner	Cap-Tons	CAM/WB									
Package Terminal A/C	Cap-Tons	CAM/WB									
Package Terminal Heat Pump	Cap-Tons	CAM/WB									
Furnace Replacement	Cap-kBtU/h	CAM/WB									
Space Heating Boiler	Cap-kBtU/h	CAM/WB									
Smart Thermostats	Each	In-Unit									
Furnace Repair/Replacement	Each	In-Unit									
Central A/C Replacement	Each	In-Unit									
High Efficiency Forced Air Unit (HE FAU)	Each	In-Unit									
Portable A/C	Each	In-Unit									
Central A/C Tune up	Each	In-Unit									
Prescriptive Duct Sealing	Each	In-Unit									
Duct Sealing	Each	CAM/WB									
Blower Motor Retrofit	Each	CAM/WB									
Efficient Fan Controller	Each	CAM/WB									
Lighting											
Interior LED Lighting	Each	CAM/WB									
Interior TLED Type A Lamps	Each	CAM/WB									
Interior TLED Type C Lamps	Each	CAM/WB									
New: LED T8 Lamp - Interior	Each	CAM/WB									
New: LED T8 Lamp - Exterior	Each	CAM/WB									
Interior LED Fixture	Each	CAM/WB									
Interior LED Screw-in	Each	CAM/WB									
Interior LED Exit Sign	Each	CAM/WB									
Exterior LED Lighting	Each	CAM/WB									
New: LED Parking Garage Fixtures	Each	CAM/WB									
LED Exterior Wall or Pole Mounted Fixture	Each	CAM/WB									
LED Corn Lamp for Exterior Wall or Pole Mounted	Each	CAM/WB									
Exterior LED Lighting - Pool	Each	CAM/WB									
Wall or Ceiling Mounted Occupancy Sensor	Each	CAM/WB									
LED Diffuse A-Lamps	Each	In-Unit									
LED Reflector Bulbs	Each	In-Unit									
Miscellaneous											
Tier-2 Smart Power Strip	Each	In-Unit									
Variable Speed Pool Pump	Each	CAM/WB									
Smart Power Strip Tier II	Each	CAM/WB									
Cold Storage	Each	In-Unit									
Air Purifier	Home	In-Unit									
CO and Smoke Alarm	Each	In-Unit									
CO and Smoke Alarm	Each	CAM/WB									
Minor Repair	Each	CAM/WB									
Electrification											
New - Central Heat Pump-FS (propane or gas space)	Each	In-Unit									
Heat Pump Clothes Dryer - FS	Each	In-Unit									
Induction Cooktop - FS	Each	In-Unit									
Ductless Mini-split Heat Pump - FS	Each	In-Unit									
Heat Pump Water Heater - FS	Each	In-Unit									
Heat Pump Pool Heater - FS	Each	CAM/WB									
Ductless Mini Split - FS	Each	CAM/WB									
Heat Pump Water Heater - FS	Each	CAM/WB									
Customer Enrollment - In Unit											
ESA Outreach & Assessment	Household	In-Unit	-								
ESA In-Home Energy Education	Household	In-Unit	-								
Ancillary Services											
Audit ²											
Total			-	-	-	-	-	\$ -	-		

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated	0
Subtotal of Master-metered Multifamily Properties Treated	0
Total Number of Multifamily Tenant Units w/in Properties Treated	0
Total Number of buildings w/in Properties Treated	0

Multifamily Households Treated (In-Unit)	Number
Total Number of Households Individually Treated	0

ESA Program - MFWB	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ 326,191	\$ 326,190	\$ 652,381
Direct Implementation (Non-Incentive)	\$ 153,199	\$ 153,199	\$ 306,397
Direct Implementation	\$ -	\$ -	\$ -
SPOC 2	\$ -	\$ -	\$ -
TOTAL MFWB COSTS	\$ 479,389	\$ 479,389	\$ 958,778

<<Includes measures costs

¹ The Southern MFWB launched on July 1, 2023. As of December 31, 2023, the MFWB Program had not completed any projects.

² For the 2023 Annual Report, the SPOC budget and expenses are reflected in ESA Table 1.

ESA Table 2C - ESA Pilot Plus and Pilot Deep Expenses and Energy Savings by Measures Installed
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		ESA Program - Pilot Plus 2023 Completed & Expensed Installation							
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditures	Effective Useful Life (EUL)	2023 Total Measure Life Cycle Bill Savings
Measures	Units (Each or Home)								
Appliances									
High Efficiency Clothes Washer	Each								
Refrigerator	Each								
Microwave	Each								
Freezer	Each								
Domestic Hot Water									
Other Domestic Hot Water	Home								
Water Heater Tank and Pipe Insulation	Home								
Water Heater Repair/Replacement	Each								
Combined Showerhead/TSV	Each								
Heat Pump Water Heater	Each								
Tub Diverter/ Tub Spout	Each								
Thermostat-controlled Shower Valve	Each								
Enclosure									
Air Sealing	Home								
Caulking	Home								
Attic Insulation	Home								
HVAC									
FAU Standing Pilot Conversion	Each								
Furnace Repair/Replacement	Each								
Room A/C Replacement	Each								
Central A/C replacement	Each								
Heat Pump Replacement	Each								
Evaporative Cooler (Replacement)	Each								
Evaporative Cooler (Installation)	Each								
Duct Test and Seal	Home								
Energy Efficient Fan Control	Home								
Prescriptive Duct Sealing	Home								
High Efficiency Forced Air Unit (HE FAU)	Home								
A/C Time Delay	Home								
Smart Thermostat	Home								
Maintenance									
Furnace Clean and Tune	Home								
Central A/C Tune up	Home								
Lighting									
Interior Hard wired LED fixtures	Each								
Exterior Hard wired LED fixtures	Each								
LED Torchiers	Each								
Occupancy Sensor	Each								
LED Night Light	Each								
LED R/BR Lamps	Each								
LED A-Lamps	Each								
Miscellaneous									
Pool Pumps	Each								
Smart Strip	Each								
Smart Strip Tier II	Each								
Pilots									
Customer Enrollment									
ESA Outreach & Assessment	Home								
ESA In-Home Energy Education	Home								
Total Savings/Expenditures									
Total Households Weatherized		-							
Households Treated									
- Single Family Households Treated	Home								
- Multi-family Households Treated	Home								
- Mobile Homes Treated	Home								
Total Number of Households Treated	Home								
# Eligible Households to be Treated for PY	Home								
% of Households Treated	%								
- Master-Meter Households Treated	Home								

ESA Program - Pilot Plus and Pilot Deep	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ 50,410	\$ 50,410	\$ 100,821
Direct Implementation (Non-Incentive)	\$ -	\$ -	\$ -
Direct Implementation	\$ -	\$ -	\$ -
<<Includes measures costs			
TOTAL PILOT PLUS and PILOT DEEP COSTS ¹	\$ 50,410	\$ 50,410	\$ 100,821

¹ The Pilot Plus and Pilot Deep summary table above reflects costs associated with the administrative activities in support of the pilot implementation in 2023. Total Pilot Plus and Pilot Deep year to date expenses are also reported in ESA Table 1A.

ESA Program - Pilot Deep								
Units (Each or Home)	2023 Completed & Expensed Installation							
	Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditures	Effective Useful Life (EUL)	2023 Total Measure Life Cycle Bill Savings
Each								
Each								
Each								
Each								
Each								
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ESA Table 2D - ESA Building Electrification (SCE only) Expenses and Energy Savings by Measures Installed
San Diego Gas & Electric
Program Year 2023 Annual Report

Measures	Units	ESA Program - Building Electrification Retrofit Pilot					
		2023 Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances							
Electric Dryer	Each	-	-	-	-	\$ -	0.0%
Heat Pump Dryer	Each	-	-	-	-	\$ -	0.0%
Cooktop/Range	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water							
Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%
Enclosure							
Attic Insulation	Home	-	-	-	-	\$ -	0.0%
HVAC							
Heat Pump HVAC	Each	-	-	-	-	\$ -	0.0%
Duct Seal	Each	-	-	-	-	\$ -	0.0%
Smart Thermostat	Each	-	-	-	-	\$ -	0.0%
Miscellaneous							
Minor Home Repair	Home	-				\$ -	0.0%
Carbon Monoxide/Smoke Alarm	Each	-				\$ -	0.0%
Electric Panel	Each	-				\$ -	0.0%
Electric Sub-Panel	Each	-				\$ -	0.0%
Electrical Circuit Run	Each	-				\$ -	0.0%
Induction Cookware	Home	-				\$ -	0.0%
Customer Enrollment							
Energy Assessment	Home	-				\$ -	0.0%
Total Savings/Expenditures			-	-	-	\$ -	0.0%
Households Treated		Total					
Single Family Households Treated	Home						
Estimated Avg. Annual Bill SavingsTreated	Home						

ESA Program - Building Electrification	Year to Date Expenses		
	Electric	Gas	Total
Administration			\$ -
Direct Implementation (Non-Incentive)			\$ -
Direct Implementation			\$ -
TOTAL Building Electrification COSTS	\$ -	\$ -	\$ -

<<Includes measures costs

ESA Table 2E - ESA Clean Energy Homes (SCE only) Expenses and Energy Savings by Measures Installed
San Diego Gas & Electric
Program Year 2023 Annual Report

Measures	Units	ESA Program - Clean Energy Homes New Construction Pilot			
		2023 Completed & Expensed Installation			
		Quantity	Avoided (CO ₂ e) emissions	Incentives Paid (\$)	% of Expenditure
Education and Outreach					
Direct Outreach (Developers and Owners)	Each	-	N/A	\$ -	0.0%
Educational Webinars	Each	-	N/A	\$ -	0.0%
Technical Design Assistance (Reserved)					
Single-Family Homes	Each	-	-	\$ -	0.0%
Multifamily Properties	Each	-	-	\$ -	0.0%
• Buildings	Each				
• No. of Dwelling Units	Each	-	-	\$ -	0.0%
Technical Design Assistance (In Process)					
Single-Family Homes	Home	-	-	\$ -	0.0%
Multifamily Properties	Each	-	-	\$ -	0.0%
• Buildings	Each	-	-	\$ -	0.0%
• No. of Dwelling Units	Each	-	-	\$ -	0.0%
Technical Design Assistance (Completed)					
Single-Family Homes	Each				
Multifamily Properties	Each	-	-	\$ -	0.0%
• Buildings	Each	-	-	\$ -	0.0%
• No. of Dwelling Units					
	Home	-		\$ -	0.0%
	Home	-		\$ -	0.0%
Total Savings/Expenditures			-	\$ -	0.0%
Households Treated		Total			
- Single Family Households Treated	Home				
- Multifamily Dwelling Units Treated	Home				
Total Number of Households Treated	Home				

ESA Program - Clean Energy Homes	Year to Date Expenses			
	Electric	Gas	Total	
Administration			\$ -	
Direct Implementation (Non-Incentive)			\$ -	
Direct Implementation			\$ -	<<Includes measures costs
TOTAL Clean Energy Homes COSTS	\$ -	\$ -	\$ -	

ESA Table 2F - ESA CSD Leveraging Expenses and Energy Savings by Measures Installed
San Diego Gas & Electric
Program Year 2023 Annual Report

Measures	Units	ESA Program - CSD Leveraging							
		Year-To-Date Completed & Expensed Installation							2023 Total Measure Life Cycle Bill Savings
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure	Effective Useful Life (EUL)	
Appliances									
High Efficiency Clothes Washer	Each	-	-	-	-	\$ -	0.0%		
Refrigerators	Each	-	-	-	-	\$ -	0.0%		
Microwaves	Each	-	-	-	-	\$ -	0.0%		
Freezer	Each								
Domestic Hot Water									
Water Heater Blanket	Home	-	-	-	-	\$ -	0.0%		
Low Flow Shower Head	Home	-	-	-	-	\$ -	0.0%		
Water Heater Pipe Insulation	Home	-	-	-	-	\$ -	0.0%		
Faucet Aerator	Home	-	-	-	-	\$ -	0.0%		
Water Heater Repair/Replacement	Each	-	-	-	-	\$ -	0.0%		
Thermostatic Shower Valve	Each	-	-	-	-	\$ -	0.0%		
Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%		
Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%		
Tub Diverter/ Tub Spout	Each	-	-	-	-	\$ -	0.0%		
Thermostat-controlled Shower Valve	Each	-	-	-	-	\$ -	0.0%		
Enclosure									
Air Sealing / Envelope	Home	-	-	-	-	\$ -	0.0%		
Caulking	Home	-	-	-	-	\$ -	0.0%		
Attic Insulation	Home	-	-	-	-	\$ -	0.0%		
HVAC									
FAU Standing Pilot Conversion	Each	-	-	-	-	\$ -	0.0%		
Furnace Repair/Replacement	Each	-	-	-	-	\$ -	0.0%		
Room A/C Replacement	Each	-	-	-	-	\$ -	0.0%		
Central A/C replacement	Each	-	-	-	-	\$ -	0.0%		
Heat Pump Replacement	Each	-	-	-	-	\$ -	0.0%		
Evaporative Cooler (Replacement)	Each	-	-	-	-	\$ -	0.0%		
Evaporative Cooler (Installation)	Each	-	-	-	-	\$ -	0.0%		
Duct Testing and Sealing	Home	-	-	-	-	\$ -	0.0%		
Energy Efficient Fan Control	Home	-	-	-	-	\$ -	0.0%		
Prescriptive Duct Sealing	Home	-	-	-	-	\$ -	0.0%		
High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -	0.0%		
A/C Time Delay	Home	-	-	-	-	\$ -	0.0%		
Maintenance									
Furnace Clean and Tune	Home	-	-	-	-	\$ -	0.0%		
Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%		
Lighting									
Compact Fluorescent Lights (CFL)	Each	-	-	-	-	\$ -	0.0%		
Interior Hard wired CFL fixtures	Each	-	-	-	-	\$ -	0.0%		
Exterior Hard wired CFL fixtures	Each	-	-	-	-	\$ -	0.0%		
Torchiere	Each	-	-	-	-	\$ -	0.0%		
Occupancy Sensor	Each	-	-	-	-	\$ -	0.0%		
LED Night Lights	Each	-	-	-	-	\$ -	0.0%		
LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	\$ -	0.0%		
LED Reflector Bulb	Each	-	-	-	-	\$ -	0.0%		
LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	\$ -	0.0%		
LED A-Lamps	Each	-	-	-	-	\$ -	0.0%		
Miscellaneous									
Pool Pumps	Each	-	-	-	-	\$ -	0.0%		
Smart Power Strips - Tier 1	Each	-	-	-	-	\$ -	0.0%		
New - Smart Power Strips - Tier 2	Each	-	-	-	-	\$ -	0.0%		
Pilots									
Customer Enrollment									
Outreach & Assessment	Home					\$ -	0.0%		
In-Home Education	Home					\$ -	0.0%		
Total Savings/Expenditures			-	-	-	\$ -	0.0%		
Total Households Weatherized									
CSD MF Buildings Treated			Total						
- Multifamily				0					

ESA Program - CSD Leveraging		Year to Date Expenses			
		Electric	Gas	Total	
Administration				\$ -	
Direct Implementation (Non-Incentive)				\$ -	
Direct Implementation				\$ -	<<Includes measures costs
TOTAL CSD Leveraging COSTS		\$ -	\$ -	\$ -	

**ESA Table 3 - ESA Program Cost Effectiveness
San Diego Gas & Electric
Program Year 2023 Annual Report**

Program	Ratio of Benefits Over Costs					Net Benefits \$		
	ESACET	Resource Test	TRC	PAC	RIM	ESACET	Resource Test	TRC
ESA In-Unit (SF, MH, MF-In-Unit)	<u>0.11</u>	<u>0.20</u>	0.03	0.03	<u>0.03</u>	<u>\$ (11,866,791)</u>	<u>\$ (3,099,125)</u>	<u>\$ (12,941,182)</u>
ESA MF CAM	N/A	N/A	0.29	0.29	0.22	N/A	N/A	\$ (1,326,761)
ESA MFWB	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ESA Pilot Plus and Pilot Deep	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Building Electrification	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Notes:

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

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

The Resource Test includes energy benefits and program measure and installation costs.

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

ESA Table 4 - ESA Detail by Housing Type and Source ¹
San Diego Gas & Electric
Program Year 2023 Annual Report

Customer	Housing Type	# Homes /Properties Treated	2023 Energy Savings ²			2023 Expenses
			(mWh)	MW	(mTherm)	
Gas and Electric Customers						
Owners - Total		2,312	352.194	0.039	3.862	\$ 5,703,069
	Single Family	2,040	350.396	0.043	3.551	\$ 4,849,110
	Multi Family	66	12.779	0.001	0.266	\$ 150,972
	Mobile Homes	206	(10.981)	(0.005)	0.045	\$ 702,987
Renters - Total		1,961	313.622	0.024	8.190	\$ 3,030,562
	Single Family	1,174	206.242	0.017	5.640	\$ 2,139,761
	Multi Family	780	107.421	0.007	2.652	\$ 873,815
	Mobile Homes	7	(0.041)	(0.000)	(0.102)	\$ 16,987
Electric Customers (only)						
Owners - Total		156	49.039	0.006	-	\$ 222,697
	Single Family	131	43.763	0.006	-	\$ 196,952
	Multi Family	15	3.954	0.000	-	\$ 15,479
	Mobile Homes	10	1.323	0.000	-	\$ 10,266
Renters - Total		104	31.004	0.004	-	\$ 148,473
	Single Family	63	22.040	0.003	-	\$ 100,664
	Multi Family	40	8.500	0.001	-	\$ 45,188
	Mobile Homes	1	0.464	0.000	-	\$ 2,621
Gas Customers (only)						
Owners - Total		-	-	-	-	\$ -
	Single Family	-	-	-	-	\$ -
	Multi Family	-	-	-	-	\$ -
	Mobile Homes	-	-	-	-	\$ -
Renters - Total		-				
	Single Family	-	-	-	-	\$ -
	Multi Family	-	-	-	-	\$ -
	Mobile Homes	-	-	-	-	\$ -
Gas and Electric Total - ESA MFWB						
ESA Multifamily In-Unit ³		-	-	-	-	\$ -
ESA Multifamily Common Area Measures		17	203.993	0.037	21.071	\$ 1,733,738
ESA Multifamily Whole Building		-	-	-	-	\$ -
Totals:		4,550	949.853	0.111	33.122	\$ 10,838,539

¹ Summary data which includes ESA Main Program (SF, MH, MF-In-Unit) and MF CAM.

² All savings are calculated based on the following sources: Impact Evaluation Program Years 2015-2017, eTRM or ESA workpapers.

³ Included in ESA Main Program expenses.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible Households Treated by Both Utilities in Shared Service Territory
2023	SoCalGas	17,868	8

ESA Table 5 - ESA Direct Purchases & Installation Contractors ¹
San Diego Gas & Electric
Program Year 2023 Annual Report

Contractor	County	Contractor Type (Check one or more if applicable)				2023 Annual Expenditures
		Private	CBO	WMDVBE	LIHEAP	
American Eco Services, Inc.	San Diego	X		X		\$ 353,768
Richard Heath & Associates	San Diego	X		X		\$ 7,067,852
THA Heating and Air Conditioning Inc.	San Diego	X				\$ 1,552,703
Willdan Engineers and Constructors (CAM)	San Diego	X				\$ 1,733,738
Staples & Associates	San Diego					\$ 130,478
Total Contractor Expenditures						\$ 10,838,539

¹ Includes contractors for Main ESA Program (SF, MH, MF-In-Unit) and MF CAM

ESA Table 6 - ESA Installation Cost of Program Installation Contractors ¹
San Diego Gas & Electric
Program Year 2023 Annual Report

	Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2023 Program Total				
		Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Installations	Costs	Cost/ Unit	Cost/ Household
		Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
Dwellings	Each	52,976	85%	12,921	100%	\$ 7,421,621	68%	9,631	15%	-	0%	\$ 3,416,918	32%	62,607	12,921	\$ 10,838,539	\$ 173.12	\$ 838.83
Appliances																		
High Efficiency Clothes Washer	Each	150	100%	150	100%	\$ 153,815	100%	-	0%	-	0%	-	0%	150	150	\$ 153,815	\$ 1,025	\$ 1,025
Refrigerator	Each	528	100%	511	100%	\$ 635,033	100%	-	0%	-	0%	-	0%	528	511	\$ 635,033	\$ 1,203	\$ 1,243
Microwave	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
New - Clothes Dryer	Each	96	100%	95	100%	\$ 120,597	100%	-	0%	-	0%	-	0%	96	95	\$ 120,597	\$ 1,256	\$ 1,269
New - Dishwasher	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
New - Freezer	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
Domestic Hot Water																		
Other Domestic Hot Water	Home	2,595	100%	2,595	100%	\$ 348,676	100%	-	0%	-	0%	\$ -	0%	2,595	2,595	\$ 348,676	\$ 134	\$ 134
Water Heater Repair/Replacement	Home	51	26%	252	64%	\$ 153,734	29%	144	74%	144	36%	\$ 380,590	71%	195	396	\$ 534,324	\$ 2,740	\$ 1,349
Water Heater Tank and Pipe Insulation	Home	43	100%	43	100%	\$ 4,303	100%	-	0%	-	0%	\$ -	0%	43	43	\$ 4,303	\$ 100	\$ 100
Heat Pump Water Heater	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Tub Diverter/ Tub Spout	Each	12	100%	8	100%	\$ 1,501	100%	-	0%	-	0%	\$ -	0%	12	8	\$ 1,501	\$ 125	\$ 188
Thermostat-controlled Shower Valve	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Combined Showerhead/TSV	Each	6	100%	5	100%	\$ 502	100%	-	0%	-	0%	\$ -	0%	6	5	\$ 502	\$ 84	\$ 100
CAM - Central Boiler	Cap-kBTU/h	-	0%	-	0%	\$ -	0%	6,938	100%	3	100%	\$ 1,281,358	100%	6,938	3	\$ 1,281,358	\$ 185	\$ 427,119
CAM - Faucet Aerator	Each	-	0%	-	0%	\$ -	0%	2	100%	2	100%	\$ 20	100%	2	2	\$ 20	\$ 10	\$ 10
CAM - Pipe Insulation	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Enclosure																		
Air Sealing	Home	3,205	100%	3,205	100%	\$ 1,693,239	100%	-	0%	-	0%	\$ -	0%	3,205	3,205	\$ 1,693,239	\$ 528	\$ 528
Attic Insulation	Home	86	100%	86	100%	\$ 134,716	100%	-	0%	-	0%	\$ -	0%	86	86	\$ 134,716	\$ 1,566	\$ 1,566
HVAC																		
FAU Standing Pilot Conversion	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Furnace Repair/Replacement	Each	278	44%	695	66%	\$ 275,292	17%	361	56%	361	34%	\$ 1,302,590	83%	639	1,056	\$ 1,577,882	\$ 2,469	\$ 1,494
Room A/C Replacement	Each	22	100%	21	100%	\$ 20,017	100%	-	0%	-	0%	\$ -	0%	22	21	\$ 20,017	\$ 910	\$ 953
Central A/C Replacement	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Heat Pump Replacement	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Evaporative Coolers (Replacement)	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Evaporative Coolers (Installation)	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Duct Test and Seal	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Energy Efficient Fan Control	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Prescriptive Duct Sealing	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Smart Thermostat	Home	315	100%	315	100%	\$ 83,205	100%	-	0%	-	0%	\$ -	0%	315	315	\$ 83,205	\$ 264	\$ 264
CAM - HEAT Pump Split System	Each	-	0%	-	0%	\$ -	0%	15	100%	2	100%	\$ 108,191	100%	15	2	\$ 108,191	\$ 7,213	\$ 54,095
High Efficiency Forced Air Unit (HIE FAU)	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
A/C Time Delay	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
CAM - AC Tune-up	Cap-Tons	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
CAM - Furnace Replacement	Cap-kBTU/h	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
CAM - Programmable Thermostat	Each	-	0%	-	0%	\$ -	0%	4	100%	2	100%	\$ 1,453	100%	4	2	\$ 1,453	\$ 363	\$ 727
Maintenance																		
Furnace Clean and Tune	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Central A/C Tune-up	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Evaporative Cooler Maintenance	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Lighting																		
Exterior Hard wired LED fixtures	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Interior Hard wired LED fixtures	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
LED Night Light	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
LED Torchere	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
LED A-Lamps	Each	18,664	100%	2,336	100%	\$ 220,608	100%	-	0%	-	0%	\$ -	0%	18,664	2,336	\$ 220,608	\$ 12	\$ 94
LED R/BR Lamps	Each	3,422	100%	642	100%	\$ 59,372	100%	-	0%	-	0%	\$ -	0%	3,422	642	\$ 59,372	\$ 17	\$ 92
CAM - Exterior LED Lighting	Fixture	-	0%	-	0%	\$ -	0%	616	100%	13	100%	\$ 159,313	100%	616	13	\$ 159,313	\$ 259	\$ 12,255
CAM - Exterior LED Lighting - Pool	Lamp	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Exterior LED Lighting - Spa	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
CAM - Interior LED Fixture	Fixture	-	0%	-	0%	\$ -	0%	762	100%	11	100%	\$ 134,350	100%	762	11	\$ 134,350	\$ 176	\$ 12,214
CAM - Interior LED Lighting	KiloLumen	-	0%	-	0%	\$ -	0%	5	100%	1	100%	\$ 722	100%	5	1	\$ 722	\$ 150	\$ 722
CAM - Interior LED Screw-in	Lamp	-	0%	-	0%	\$ -	0%	50	100%	10	100%	\$ 744	100%	50	10	\$ 744	\$ 15	\$ 74
CAM - Interior TLED Type A Lamps	Lamp	-	0%	-	0%	\$ -	0%	20	100%	2	100%	\$ 390	100%	20	2	\$ 390	\$ 20	\$ 195
CAM - Interior TLED Type C Lamps	Lamp	-	0%	-	0%	\$ -	0%	696	100%	10	100%	\$ 29,079	100%	696	10	\$ 29,079	\$ 42	\$ 2,908
CAM - Interior LED Exit Sign	Fixture	-	0%	-	0%	\$ -	0%	5	100%	1	100%	\$ 817	100%	5	1	\$ 817	\$ 163	\$ 817
Miscellaneous																		
Smart Strip	Each	575	100%	510	100%	\$ 34,195	100%	-	0%	-	0%	\$ -	0%	575	510	\$ 34,195	\$ 59	\$ 67
Smart Strip Tier II	Each	1,230	100%	1,051	100%	\$ 102,853	100%	-	0%	-	0%	\$ -	0%	1,230	1,051	\$ 102,853	\$ 84	\$ 98
Variable Speed Pool Pump	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
CAM - Tier-2 Smart Power Strip	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
CAM - Variable Speed Pool Pump	Each	-	0%	-	0%	\$ -	0%	1	100%	1	100%	\$ 4,332	100%	1	1	\$ 4,332	\$ 4,332	\$ 4,332
Ancillary Services																		
Commissioning	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Audit	Home	-	0%	-	0%	\$ -	0%	12	100%	-	0%	\$ 12,969	100%	12	-	\$ 12,969	\$ 1,081	\$ #DIV/0!
Administration	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Customer Enrollment																		
ESA In-Home Energy Education	Home	8,777	100%	8,777	100%	251,812	100%	-	0%	-	0%	\$ -	0%	8,777	8,777	\$ 251,812	\$ 29	\$ 29
ESA Outreach & Assessment	Home	12,921	100%	12,921	100%	3,128,153	100%	-	0%	-	0%	\$ -	0%	12,921	12,921	\$ 3,128,153	\$ 242	\$ 242

¹ Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging, and Building Electrification.

ESA Table 7 - ESA Expenditures Recorded by Cost Element¹
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ESA Program:	Labor	Non-Labor	Contractor	Total
Energy Efficiency				
ESA Main Program (SF, MH, MF In-Unit) ²				
Appliances			\$ 909,445	\$ 909,445
Domestic Hot Water			\$ 889,305	\$ 889,305
Enclosure			\$ 1,827,955	\$ 1,827,955
HVAC			\$ 1,681,104	\$ 1,681,104
Maintenance			\$ -	\$ -
Lighting			\$ 279,980	\$ 279,980
Miscellaneous			\$ 137,048	\$ 137,048
Customer Enrollment			\$ 3,128,067	\$ 3,128,067
In Home Education			\$ 251,898	\$ 251,898
Multi-Family Common Area Measures ³				
Appliances			\$ -	\$ -
Domestic Hot Water			\$ 1,281,378	\$ 1,281,378
Enclosure			\$ -	\$ -
HVAC			\$ 109,644	\$ 109,644
Maintenance			\$ -	\$ -
Lighting			\$ 325,414	\$ 325,414
Miscellaneous			\$ 4,332	\$ 4,332
Customer Enrollment			\$ -	\$ -
In Home Education			\$ -	\$ -
Multi-Family Whole Building ⁴				
Appliances			\$ -	\$ -
Domestic Hot Water			\$ -	\$ -
Enclosure			\$ -	\$ -
HVAC			\$ -	\$ -
Maintenance			\$ -	\$ -
Lighting			\$ -	\$ -
Miscellaneous			\$ -	\$ -
Customer Enrollment			\$ -	\$ -
In Home Education			\$ -	\$ -
Pilot Plus and Pilot Deep ⁵				
Appliances			\$ -	\$ -
Domestic Hot Water			\$ -	\$ -
Enclosure			\$ -	\$ -
HVAC			\$ -	\$ -
Maintenance			\$ -	\$ -
Lighting			\$ -	\$ -
Miscellaneous			\$ -	\$ -
Customer Enrollment			\$ -	\$ -
In Home Education			\$ -	\$ -
Building Electrification (SCE Only)				
Clean Energy Homes (SCE Only)				
			\$ -	\$ -
CSD Leveraging				
Appliances			\$ -	\$ -
Domestic Hot Water			\$ -	\$ -
Enclosure			\$ -	\$ -
HVAC			\$ -	\$ -
Maintenance			\$ -	\$ -
Lighting			\$ -	\$ -
Miscellaneous			\$ -	\$ -
Customer Enrollment			\$ -	\$ -
In Home Education			\$ -	\$ -
Energy Efficiency TOTAL	\$ -	\$ -	\$ 10,825,570	\$ 10,825,570
Training Center	\$ -	\$ 4,788	\$ -	\$ 4,788
Workforce Education and Training	\$ -	\$ -	\$ -	\$ -
Inspections	\$ 168,184	\$ -	\$ -	\$ 168,184
Marketing and Outreach	\$ 215,421	\$ 618,845	\$ -	\$ 834,266
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
Measurement and Evaluation Studies	\$ -	\$ 4,206	\$ -	\$ 4,206
Regulatory Compliance	\$ 223,625	\$ 28,002	\$ -	\$ 251,628
General Administration	\$ 1,078,081	\$ 883,708	\$ -	\$ 1,961,788
CPUC Energy Division	\$ -	\$ 24,803	\$ -	\$ 24,803
SPOC	\$ 37,477	\$ 147,084	\$ -	\$ 184,562
TOTAL PROGRAM COSTS	\$ 1,722,788	\$ 1,711,436	\$ 10,825,570	\$ 14,259,794

¹ "Below the line" administrative costs (rows 63-72) includes ESA Main Program (SF, MH, MF-In-Unit) and does not include administrative costs for ESA CAM, MFWB, or Pilot Plus/Pilot Deep.

² ESA Main Program energy efficiency costs include SF, MH, MF-In-Unit. See Direct Implementation expenses of \$9,104,802 in ESA Table 2 Main worksheet..

³ SDG&E did not account for Multi-Family Common Area Measures (MF CAM) labor and non-labor expenses at this energy efficiency measure level of detail. MF CAM excludes "Administration" and "Direct Implementation (non-incentive)" non-contractor labor and non-labor expenditures of \$48,622 and \$185,704, respectively. See ESA Table 2A MF CAM worksheet for program expense detail.

⁴ SDG&E did not account for MFWB labor and non-labor expenses at this energy efficiency measure level of detail. MFWB program excludes "Administration" and "Direct Implementation (non-incentive)" non-contractor labor and non-labor expenditures of \$354,726 and \$604,052, respectively. See ESA Table 2B MFWB worksheet for program expense detail.

⁵ SDG&E did not account for Pilot Plus and Pilot Deep labor and non-labor expenses at this energy efficiency measure level of detail. Pilot Plus and Pilot Deep excludes "Administration" non-contractor labor and non-labor expenditures of \$43,231 and \$57,590, respectively. See ESA Table 2C PP PD worksheet for program expense detail.

ESA Table 8 - ESA Homes Unwilling / Unable to Participate ¹
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Reason Provided							
County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
SAN DIEGO	7,993	15,842	15	-	3,198	444	2,930
ORANGE	4	32	-	-	1	-	1
Total	7,997	15,874	15	-	3,199	444	2,931

¹ Summary data includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging, and Building Electrification.

ESAP Coordinated Treatment (SCE and SCG only)

	Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency ¹				
# of Households Received Measures from one Utility, but not other Utility or Partnering Agency	# of Customer Unwilling/Declined Program Measures	# of Customer Unavailable - Scheduling Conflicts	# of Hazardous Environment (unsafe/unclean)	# of Landlord Refused to Authorize Participation	# of Other Infeasible/ Ineligible
Total	-	-	-	-	-

¹ Summary data includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM and MFWB.

**ESA Table 9 - ESA Building Electrification (SCE Only) Life Cycle Bill Savings by Measure
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Residential Energy Rate Used for Bill Savings Calculations				Non-Residential Energy Rate Used for Bill Savings Calculations (MF In-Unit, MF CAM, MFWB)		
Year	\$/kWh	\$/Therm		Year	\$/kWh	\$/Therm
2023				2023		
2024				2024		
2025				2025		
2026				2026		
2027				2027		
2028				2028		
2029				2029		
2030				2030		
2031				2031		
2032				2032		
2033				2033		
2034				2034		
2035				2035		
2036				2036		
2037				2037		
2038				2038		
2039				2039		
2040				2040		
2041				2041		
2042				2042		
2043				2043		
2044				2044		
2045				2045		
2046				2046		
2047				2047		

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ESA Table 10A				
Bill Savings Calculations by Program Year (ESA Main - SF, MH, MF-In-Unit)				
Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2013	\$ 17,874,649	\$ 7,897,313	0.44	\$ 450
2014	\$ 19,143,282	\$ 9,030,922	0.47	\$ 410
2015	\$ 17,355,596	\$ 5,632,584	0.32	\$ 279
2016	\$ 17,511,142	\$ 5,435,882	0.31	\$ 275
2017	\$ 30,649,505	\$ 5,891,654	0.19	\$ 272
2018	\$ 22,780,528	\$ 15,889,992	0.70	\$ 743
2019	\$ 18,146,973	\$ 2,988,782	0.16	\$ 184
2020	\$ 12,620,852	\$ 2,315,240	0.18	\$ 198
2021	\$ 14,510,984	\$ 2,571,105	0.18	\$ 188
2022	\$ 14,369,754	\$ 2,329,568	0.16	\$ 184
2023	\$ 13,751,896	\$ 664,117	0.05	\$ 147

ESA Table 10C					
Bill Savings Calculations by Program Year - MF CAM and MFWB ¹					
Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per In-Unit Average Lifecycle Bill Savings	Per Property Average Lifecycle Bill Savings
2011					
2012					
2013					
2014					
2015					
2016					
2017					
2018					
2019					
2020					
2021					
2022					
2023	\$ 1,955,093	\$ 1,213,147	0.62	n/a	\$ 71,362

¹ Table 10C reflects ESA MF CAM only for PY 2022

ESA Table 10B				
Bill Savings Calculations by Program Year (Pilot Plus and Pilot Deep)				
Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022				
2023		n/a	n/a	n/a

Note: Pilot did not launch until after 2023.

ESA Table 10D				
Bill Savings Calculations by Program Year - Building Electrification				
Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022				
2023	n/a	n/a	n/a	n/a

Note: Building Electrification Pilot is not applicable to SDG&E.

ESA Table 12 - ESA Categorical and Other Enrollment
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ESA Table 12A ESA Main (SF, MH, MF In-Unit) ¹	
Type of Enrollment	Number of Homes Treated
Women, Infants, and Children Program (WIC)	357
Supplemental Security Income (SSI)	303
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	620
CalWORKs/Temporary Assistance for Needy Families (TANF)	34
Tribal TANF	-
Medicaid/Medi-Cal for Families	1,314
Healthy Families A&B	-
National School Lunch Program (NSLP) - Free Lunch	-
Low-income Home Energy Assistance Program (LIHEAP)	1
Bureau of Indian Affairs General Assistance	-
Head Start Income Eligible - (Tribal Only)	-
CARE Income Certified	274
80/20 Rule ²	-
Targeted Self Certification	674
Standard Enrollment	956
Total	4,533

ESA Table 12B ³ ESA Pilot Plus and Pilot Deep	
Type of Enrollment	Number of Homes Treated
Women, Infants, and Children Program (WIC)	
Supplemental Security Income (SSI)	
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	
CalWORKs/Temporary Assistance for Needy Families (TANF)	
Tribal TANF	
Medicaid/Medi-Cal for Families	
Healthy Families A&B	
National School Lunch Program (NSLP) - Free Lunch	
Low-income Home Energy Assistance Program (LIHEAP)	
Bureau of Indian Affairs General Assistance	
Head Start Income Eligible - (Tribal Only)	
CARE Income Certified	
80/20 Rule ²	
Targeted Self Certification	
Standard Enrollment	
Total	-

ESA Table 12C ESA Building Electrification (SCE Only)	
Type of Enrollment	Number of Homes Treated
Women, Infants, and Children Program (WIC)	
Supplemental Security Income (SSI)	
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	
CalWORKs/Temporary Assistance for Needy Families (TANF)	
Tribal TANF	
Medicaid/Medi-Cal for Families	
Healthy Families A&B	
National School Lunch Program (NSLP) - Free Lunch	
Low-income Home Energy Assistance Program (LIHEAP)	
Bureau of Indian Affairs General Assistance	
Head Start Income Eligible - (Tribal Only)	
CARE Income Certified	
80/20 Rule	
Targeted Self Certification	
Standard Enrollment	
Total	-

¹ Summary data which includes ESA Main Program (SF, MH, MF-In-Unit).

² Pursuant to D.01-03-028 OP 3(a) which is applicable to master-metered as well as individual metered homes which allows treatment of property when 80% of tenants are income qualified for ESA Program.

³ SDG&E's Pilot Plus and Pilot Deep will launch in 2024.

ESA Table 13A - ESA Leveraging & Integration¹
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ESA Table 13A-1 ESA Main (SF, MH, MF In-Unit) ¹										
Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Savings ³	Other Measurable Benefits ³	Enrollments Resulting from Leveraging Effort ⁴	Methodology ⁵	Meets all Criteria	If not, explain
LIHEAP	SDG&E's partners with local CSD agencies to enroll eligible LIHEAP bill assistance customers in the ESA Program. ESA expanded efforts which allowed LIHEAP agencies to perform outreach and assessment services.	Yes	No	N/A	N/A	Unknown	N/A	Sum of savings per treated homes identified as having LIHEAP agency as the source of the enrollment.	No	We are unable to accurately track dollars saved from this effort.
DAC-SASH	Leveraging partnership with GRID where SDG&E received list of potential ESA Leads. Lead generated ESA Program enrollments.	Yes	Yes	N/A	N/A	Unknown	N/A	Sum of savings per treated homes identified as having Grid Alternatives (SASH) as the source of the enrollment.	No	We are unable to accurately track dollars saved from this effort.
SDCWA	Partnership to leverage installation of customers receiving water saving measure in SDCWA service territory. SDCWA provides rebates to SDG&E for measures.	Yes	Yes	N/A	N/A	Unknown	N/A	Total rebate amount received from SDCWA in 2023.	No	We are unable to track the savings from this effort.
CARE/Medical Baseline	Marketing to customers enrolled in CARE and/or Medical Baseline	No	No	N/A	kWh: 7,765 kW: 1 Therms: 44	Unknown	77	Sum of savings per treated homes identified as having CARE or Medical Baseline as lead source.	No	We are unable to accurately track dollars saved from this effort.
CARE High Usage	Automated Lead Generation for CARE High Usage Verification Process	No	No	N/A	kWh: 39,595 kW: 4 Therms: 219	Unknown	465	Sum of savings per treated homes identified as having CARE High Usage as lead source	No	We are unable to accurately track dollars saved from this effort.

ESA Table 13A-2 MF CAM and MFWB										
Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
SOMAH	Leveraging partnership with CSE where SDG&E received list of potential ESA Leads. Lead generated for ESA MFWB.	Yes	No	N/A	N/A	N/A	0	N/A	N/A	N/A
RZNET	For properties not eligible/interested in MFWB, referred to RZNET to make. RZNET refers properties that may also benefit from additional measures in MFWB program.	Yes	No	N/A	N/A	N/A	0	N/A	N/A	N/A

ESA Table 13A-3 ESA Pilot Plus and Pilot Deep										
Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain

ESA Table 13A-4 ESA Building Electrification (SCE Only)										
Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain

ESA Table 13A-5 ESA Clean Energy Homes (SCE Only)										
Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain

Note: Summary data includes ESA Main Program (SF, MH, MF-In-Unit), Pilot Plus and Pilot Deep, MF CAM, Building Electrification, and Clean Energy Homes.

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

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

³ Annual Energy savings/benefits for measures installation in 2023. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.

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

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

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

**ESA Table 13B - ESA Clean Energy Referral, Leveraging, and Coordination
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Partner	Brief Description of Effort	# of Referral ¹	# of Leveraging ²	# of Coordination Efforts ³	# of Leads ⁴	# of Enrollments from Successful Leads ⁵
LIHEAP	LIHEAP agencies in SDG&E service territory leverage LIHEAP payment leads to provide ESA Program services to customers.	N/A	N/A	N/A	0	0
DAC-SASH	The DAC-SASH implementer provides SDG&E with potential ESA and CARE Program Leads. SDG&E provides an annual list of program leads to DAC-SASH implementer for marketing purposes.	N/A	N/A	N/A	14	0
SDCWA	SDG&E efforts to coordinate program information with SDCWA.	0	0	1	0	0
CARE/Medical Baseline	CARE Online Enrollments are leveraged for ESA Program Enrollments.	N/A	N/A	N/A	1	0
CARE High Usage	Leads generated through CARE HEU income verifications completed	N/A	N/A	N/A	752	429
Energy Solutions Partner Network	SDG&E works closely with a network of approximately 200 community-based organizations (CBOs) to connect customers with Customer Assistance programs.	N/A	N/A	N/A	1296	20
CARE Capitation Agencies	SDG&E partners with 22 social service agencies to help enroll its hardest-to-reach customers in Customer Assistance programs.	N/A	N/A	N/A	2186	65
Demand Response - AC Saver ⁶	Eligible residential customers who own a qualifying Wi-Fi enabled smart thermostat may enroll. During an "energy event," SDG&E will notify the smart thermostat provider to temporarily adjust the temperature setting on the thermostat up to four degrees to limit A/C usage. Participating customers may qualify for an SDG&E incentive.	N/A	N/A	N/A	N/A	315
MFWB ⁷	Coordination with SDG&E in their Administration of the Southern Section MFWB program	403	0	0	0	0

¹ Number of outbound referrals being given to the partner.

² Number of activities that involve the sharing resources to jointly support program delivery or administration. (Example: Sharing of Lead Lists, Cost Splitting, etc.).

³ Number of activities related to program communication (marketing), collaboration of events, and alignment of activities to support program delivery.

⁴ Number of inbound Leads or Referrals from the Partner

⁵ Number of enrollments that results from the Leads or Referrals supplied by the Partner

⁶ Cumulative number of customers that enrolled the respective program with 120-days of their ESA in-home visitation in which they received Energy Education

⁷ Number of referrals being supplied to SDG&E by SCE and SoCalGas, the number of Enrollments being completed on behalf of SDG&E for the MFWB

ESA Table 14 - ESA Expenditures for Pilots and Studies
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	Authorized 2023 Funding			2023 Expenses			Cycle to Date Expenses			% of Budget Expended		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots												
Virtual Energy Coach (PG&E only)												
Total Pilots	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Studies												
Low Income Needs Assessment Study ¹	\$ 18,750	\$ 18,750	\$ 37,500	\$ -	\$ -	\$ -	\$ 18,725	\$ 18,725	\$ 37,451	100%	100%	100%
Statewide CARE-ESA Categorical Study ²	\$ 5,625	\$ 5,625	\$ 11,250	\$ 2,103	\$ 2,103	\$ 4,206	\$ 5,584	\$ 5,584	\$ 11,167	99%	99%	99%
Energy Impact Evaluation ²	\$ 112,500	\$ 112,500	\$ 225,000	\$ -	\$ -	\$ -			\$ -	0%	0%	0%
Non-Energy Impact Study ²	\$ 37,500	\$ 37,500	\$ 75,000	\$ -	\$ -	\$ -			\$ -	0%	0%	0%
Multifamily Common Area Measure Process Evaluation ²	\$ 37,500	\$ 37,500	\$ 75,000	\$ -	\$ -	\$ -			\$ -	0%	0%	0%
Rapid Feedback Research and Analysis ²	\$ 150,000	\$ 150,000	\$ 300,000	\$ -	\$ -	\$ -	\$ 37,813	\$ 37,813	\$ 75,626	25%	25%	25%
Total Studies	\$ 361,875	\$ 361,875	\$ 723,750	\$ 2,103	\$ 2,103	\$ 4,206	\$ 62,122	\$ 62,122	\$ 124,244	17%	17%	17%

¹ The Low Income Needs Assessment Study budget presented in this table is for the program cycle 2021-2026, as authorized in Advice Letter 3478-E and 2828-G.

² The study budgets presented in this table are for the program cycle 2021-2026, as authorized in D.21.06.015.

**ESA Table 15 - ESA Tribal Outreach
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OUTREACH STATUS	Quantity (Includes CARE, FERA, and ESA) ³	List of Participating Tribes
Tribes completed ESA Meet & Confer ¹	13	Barona Band of Mission Indians, Pauma Band of Mission Indians, La Posta Band of Mission Indians, Mesa Grande Band of Mission Indians, Manzanita Band of Kumeyaay Nation, Campo Kumeyaay Nation, Iipay Nation of Santa Ysabel, La Jolla Band of Luiseno Indians, San Pasqual Band of Mission Indians, Los Coyotes Band of Cahuilla and Cupeno Indians, Sycuan Band of Kumeyaay Nation, Jamul Indian Village, Viejas Band of Kumeyaay Indians
Tribes requested outreach materials or applications	11	Pauma Band of Mission Indians, La Posta Band of Mission Indians, Mesa Grande Band of Mission Indians, Iipay Nation Santa Ysabel, San Pasqual Band of Mission Indians, Campo Kumeyaay Nation, Manzanita Band of Kumeyaay Nation, La Jolla Band of Luiseno Indians, Los Coyotes Band of Cahuilla and Cupeno Indians, Barona Band of Mission Indians, and Jamul Indian Village.
Tribes who have not accepted offer to Meet and Confer ⁴	4	Ewiiapaayp, Inaja Cosmit Band of Indians, Pala Band of Mission Indians, Rincon Band of Luiseno Indians
Non-Federally Recognized Tribes who participated in Meet & Confer	0	
Tribes and Housing Authority sites involved in Focused Project/ESA	N/A	N/A
Partnership offer on Tribal Lands	6	Iipay Nation of Santa Ysabel, La Jolla Band of Luiseno Indians, La Posta Band of Mission Indians, Campo Kumeyaay Nation, Los Coyotes Band of Cahuilla and Cupeno Indians, Southern Indian Health Council
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	2	Southern California American Indian Resource Center (SCAIR); Southern California Tribal Chairmen's Association (SCTCA) ²
Housing Authority and TANF offices who participated in Meet and Confer	N/A	N/A

¹ SDG&E notes that it has held informational meetings with these tribes to provide information on low income programs and other customer programs. As such, the term Meet and Confer, used here, is unrelated to a Duty to Meet and Confer, pursuant to Rule 13.9. SDG&E has invited all 17 tribes to meet and will continue to engage throughout 2024.

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

³ Numbers are a rolling count of Tribal Outreach efforts

⁴ SDG&E does not provide service to Inaja & Cosmit

ESA Table 16 - ESA Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions*
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ESA Table 16A ESA Main (SF, MH, MF in-unit)													
Customer Segments	# of Households Eligible ¹	# of Households Treated ²	Enrollment Rate = (C/B)	# of Households Contacted ³	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures) ⁴	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only) ⁵	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures) ⁵	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only) ⁵	Avg. Cost Per Treated Households	Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type													
SF	170522	3408	2%	6716	51%	87.96	90.12	0.01	1.32	3.52	1011.73	0.07	0.01
MH	22468	224	1%	318	70%	-23.14	-16.44	-0.01	-0.41	-8.11	1617.80	-0.01	-0.01
MF In-Unit	179480	901	1%	1657	54%	67.29	68.67	0.00	1.51	1.61	550.71	0.03	0.04
Rent vs. Own													
Own	136885	2468	2%	78024	3%	109.42	119.10	0.01	1.07	4.83	1584.01	0.11	0.01
Rent	236613	2065	1%	23006	9%	73.25	59.37	0.00	1.41	1.41	539.73	0.02	0.02
Previous vs. New Participant													
Previous ¹⁸	N/A	2952	N/A	64786	5%	73.25	77.40	0.01	1.31	2.52	916.27	0.04	0.01
New Participant	13760	1581	11%	78242	2%	91.97	92.08	0.01	1.18	3.08	1021.90	0.11	0.02
Seniors ⁶	166246	1306	1%	N/A	N/A	76.03	80.14	0.01	1.07	2.54	1111.78	0.06	0.02
Veterans	44771	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Hard-to-Reach ⁷	N/A	4452	N/A	N/A	N/A	77.66	80.70	0.01	1.29	2.65	936.65	0.05	0.01
Vulnerable ⁸	160975	1112	1%	29467	4%	45.27	47.61	0.00	1.39	1.90	740.69	0.02	0.02
Location													
DAC	90092	759	1%	17775	4%	44.01	45.44	0.00	1.52	2.10	724.76	0.02	0.02
Rural	8611	113	1%	3256	3%	111.69	119.46	0.01	0.54	1.76	1001.05	0.05	0.00
Tribal ¹⁸	21716	5	0%	180	3%	218.90	218.90	0.02	0.00	0.00	923.89	0.02	
SPS Zone	131968	50	0%	2073	2%	182.52	195.98	0.02	-0.98	-1.34	966.18	0.94	-0.02
Wildfire Zone ⁹	63552	302	0%	14202	2%	141.64	146.04	0.02	0.55	1.68	1005.61	0.19	0.01
Climate Zone 6	16775	3	0%	4714	0%	254.13	254.13	0.03	0.00	0.00	1131.63	0.06	N/A
Climate Zone 7	244028	3038	1%	99698	3%	70.62	72.36	0.01	1.20	2.63	921.76	0.04	0.00
Climate Zone 8	4649	1	0%	1456	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	N/A
Climate Zone 10	99636	1476	1%	43005	3%	92.71	100.13	0.01	1.44	2.72	997.78	0.08	0.01
Climate Zone 14	3490	15	0%	749	2%	283.12	283.12	0.03	0.00	0.00	997.77	0.04	N/A
Climate Zone 15	1084	1	0%	153	1%	193.01	193.01	0.02	2.98	-1.59	1406.94	0.06	0.00
CARB Communities ¹⁰	293478	510	0%	12496	4%	46.20	47.26	0.00	1.35	1.88	764.01	0.02	0.01
Financial													
CARE	301966	4182	1%	142646	3%	81.22	83.70	0.01	1.29	2.88	932.45	0.05	0.01
FERA	42980	80	0%	4231	2%	70.97	71.37	0.01	1.09	2.51	816.09	0.03	0.01
Disconnected ¹¹	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Arrearages ¹²	144053	24	0%	N/A	N/A	146.91	203.15	0.02	1.84	6.82	1337.88	0.05	0.03
High Usage ¹³	52414	246	0%	6690	4%	106.02	107.11	0.01	1.47	3.02	905.20	0.01	0.01
High Energy Burden ¹⁴	132033	823	1%	17392	5%	50.16	50.85	0.00	1.09	1.98	766.52	0.02	0.05
SEVI ¹⁵													
Low	275414	738	0%	36620	2%	116.66	121.49	0.01	0.91	3.07	1154.55	0.12	0.01
Medium	318131	1456	0%	55103	3%	93.20	97.17	0.01	1.03	3.27	1083.28	0.09	0.02
High	243149	2326	1%	57394	4%	62.24	64.57	0.01	1.45	2.34	825.90	0.03	0.01
Affordability Ratio ¹⁶	35421	396	1%	11876	3%	47.50	47.91	0.00	1.22	1.92	666.52	0.03	0.04
Health Condition													
Medical Baseline	20925	378	2%	7889	5%	104.17	108.31	0.01	0.87	3.11	1165.14	0.03	0.01
Respiratory ¹⁷													
Low	283333	1731	1%	67365	3%	96.42	99.58	0.01	0.96	2.63	1008.61	0.09	0.01
Medium	195497	1484	1%	47115	3%	80.35	84.73	0.01	1.25	2.81	958.83	0.06	0.01
High	113025	1305	1%	34637	4%	58.41	60.08	0.01	1.58	2.63	864.64	0.03	0.02
Disabled	115907	317	0%	N/A	N/A	89.07	97.03	0.01	0.91	2.35	1056.00	0.04	0.02

[*] SDG&E is reporting on these customer segments at the direction of the ED with the caveat that estimates/numbers may be compiled from multiple sources, based on available estimates, and/or self-reported data. The numbers may not be additive.

¹ 2023 eligibility estimates provided by Athens Research, except as otherwise noted.

² Households treated data is not additive because customers may be represented in multiple categories. Data is compiled based on ESA measures received YTD, and may include enrollments from prior years.

³ The number of household contacted includes YTD leads and enrollments.

⁴ SDG&E has considered the energy savings associated with all ESA measures installed for this entry, regardless of whether the savings have a negative or positive value for kW, kWh, and/or Therms. Many measures offered in ESA provide Non-Energy Benefits (including Health, Comfort, and Safety (HCS)) in addition to energy savings, and some of these measures may be associated with a negative savings value.

⁵ SDG&E has considered all energy savings associated with the ESA measures installed for this entry. Positive and negative savings values for both kWh and Therms were included.

⁶ This represents the number of households with at least one member who is at least 62 years old at the time of data collection.

⁷ "Hard-to-reach" residential customers include "those customers who do not have easy access to program information or generally do not participate in energy efficiency programs due to a language, income, housing type, geographic, or home ownership (split incentives) barrier" (Advice Letter 4482-G/6314-E dated September 1, 2021). For the purpose of this reporting, SDG&E is defining "hard-to-reach" as those residential customer self-identified as not preferring or speaking English as the primary language because income, housing type, geographic, and homeownership information is reported elsewhere on this table.

⁸ Vulnerable refers to Disadvantaged Vulnerable Communities (DVC) which consist of communities in the 25% highest scoring census tracts according to the most current versions of the California Communities Environmental Health Screening Tool (CalEnviroScreen), as well as all California tribal lands, census tracts that score in the highest 5% of Pollution Burden within CalEnviroScreen, but do not receive an overall CalEnviroScreen score due to unreliable public health and socioeconomic data, and census tracts with median household incomes less than 60% of state median income.

⁹ Includes Tier 2 and 3 of the CPUC Fire-Threat Map.

¹⁰ This reflects communities within SDG&E's service territory that are identified by the California Air Resources Board (CARB) Community Air Protection Program as communities continue to experience environmental and health inequities from air pollution.

¹¹ Rates are based on the previous year. SDG&E began issuing disconnection notices in Q3 2022; and will use the static data set of PY 2022 disconnections processed for this customer segment reporting in 2023. Disconnections did not include Low Income customers in 2023.

¹² SDG&E defines arrearages as overdue balance greater than 30 days. Estimated eligibility is based on CARE/FERA households with arrearages in the prior year as reported in SDG&E's R.18-07-015 Monthly Disconnection Report through December 2022.

¹³ SDG&E defines high usage as at least 400% of baseline at least three times in 12-month period.

¹⁴ SDG&E utilizes the Low-Income Energy Affordability Data (LEAD) Tool developed DOE's Office of Energy Efficiency & Renewable Energy to identify census tracts with high energy burden for households at below 200 % Federal Poverty Level (FPL) that are in SDG&E's service territory. The 2016 Needs Assessment for the Energy Savings Assistance and the California Alternate Rates for Energy Programs describes households that spent more 6.3% of their annual income on energy bills as having high energy burden (p.47).

¹⁵ The Socioeconomic Vulnerability Index (SEVI) metric represents the relative socioeconomic standing of census tracts, referred to as communities, in terms of poverty, unemployment, educational attainment, linguistic isolation, and percentage of income spent on housing. SDG&E utilizes the SEVI data provided by the CPUC to map its service territory by SEVI scores (L: 0 to 33; M: >33 to 66; H: >66).

¹⁶ The Affordability Ratio (AR) metric quantifies the percentage of a representative household's income that would be used to pay for an essential utility service after non-discretionary expenses such as housing and other essential utility service charges are deducted from the household's income. Using Gas AR20 and Electric AR20 data for 2023 (using 2019 base year) provided by the CPUC, SDG&E selects census tracts with Electric AR20 above 15% or Gas AR20 above 10% to identify areas within its service territory as having high affordability ratio (CPUC 2019 Annual Affordability Report, pp 34, 44).

¹⁷ SDG&E utilizes the 'Asthmas' indicator in CalEnviroScreen 4.0 (published by the California Office of Environmental Health Hazard Assessment) as a proxy to identify locations with varying levels of respiratory conditions within its service territory. L: 0-33 percentile; M: >33-66 percentile; H: >66-100 percentile.

¹⁸ This data captures tribal households located on federally-recognized tribes whose trust lands are identified in the Bureau of Indian Affairs, and also includes ESA participants from non federally-recognized tribes or households that self-identified as Native American.

¹⁹ YTD, cost and energy savings for this customer segment includes a significant portion of in-progress projects, as well as projects with higher cost measures, which may skew the average savings and cost (Columns G-L) higher than the averages for the reported completed projects in Column B.

ESA Table 16D Pilot Plus and Pilot Deep													
Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Enrollment Rate = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households	Avg. III Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. III Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type			0%		0%								
SF			0%		0%								
MHI			0%		0%								
MF In-Unit			0%		0%								
Rent vs. Own			0%		0%								
Own			0%		0%								
Rent			0%		0%								
Previous vs. New Participant			0%		0%								
Seniors			0%		0%								
Veterans			0%		0%								
Hard-to-Reach			0%		0%								
Vulnerable			0%		0%								
Location													
DAC			0%		0%								
Rural			0%		0%								
Tribal			0%		0%								
PSPS Zone			0%		0%								
Wildfire Zone			0%		0%								
Climate Zone 7 (example)			0%		0%								
Climate Zone 10 (example)			0%		0%								
Climate Zone 14 (example)			0%		0%								
Climate Zone 15 (example)			0%		0%								
CARB Communities			0%		0%								
Financial													
CARE			0%		0%								
Disconnected			0%		0%								
Arrearages			0%		0%								
High Usage			0%		0%								
High Energy Burden			0%		0%								
SEVI			0%		0%								
Affordability Ratio			0%		0%								
Health Condition													
Medical Baseline			0%		0%								
Respiratory			0%		0%								
Disabled			0%		0%								

Note: SDG&E's Pilot Plus and Pilot Deep will launch in 2024.

ESA Table 16E Building Electrification (SCE Only)													
Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Enrollment Rate = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households	Avg. III Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. III Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type			0%		0%								
SF			0%		0%								
MHI			0%		0%								
MF In-Unit			0%		0%								
Rent vs. Own			0%		0%								
Own			0%		0%								
Rent			0%		0%								
Previous vs. New Participant			0%		0%								
Seniors			0%		0%								
Veterans			0%		0%								
Hard-to-Reach			0%		0%								
Vulnerable			0%		0%								
Location													
DAC			0%		0%								
Rural			0%		0%								
Tribal			0%		0%								
PSPS Zone			0%		0%								
Wildfire Zone			0%		0%								
Climate Zone 7 (example)			0%		0%								
Climate Zone 10 (example)			0%		0%								
Climate Zone 14 (example)			0%		0%								
Climate Zone 15 (example)			0%		0%								
CARB Communities			0%		0%								
Financial													
CARE			0%		0%								
Disconnected			0%		0%								
Arrearages			0%		0%								
High Usage			0%		0%								
High Energy Burden			0%		0%								
SEVI			0%		0%								
Affordability Ratio			0%		0%								
Health Condition													
Medical Baseline			0%		0%								
Respiratory			0%		0%								
Disabled			0%		0%								

Note: The BE pilot does not apply to SDG&E.

**CARE Table 1 - CARE Overall Program Expenses
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Category	Overall Expenditures		Total Expenditures	Authorized Budget ¹	% of Budget Spent	Total Shifted ²	Shifted to/from?
	Electric	Gas					
Outreach	\$ 2,289,748	\$ 274,274	\$ 2,564,022	\$ 2,564,022	100%	\$ (729,944)	Shifted to Processing, Certification, Recertification
Processing, Certification, Recertification	\$ 1,623,901	\$ 198,900	\$ 1,822,801	\$ 1,822,801	100%	\$ 1,211,704	Shifted from Outreach and IT Programming
Post Enrollment Verification	\$ 103,886	\$ 12,726	\$ 116,612	\$ 474,710	25%		
IT Programming	\$ 549,865	\$ 67,374	\$ 617,239	\$ 627,640	98%	\$ (481,760)	Shifted to Processing, Certification, Recertification
Pilots	\$ -	\$ -	\$ -	\$ -	0%		
CHANGES	\$ 246,629	\$ 32,110	\$ 278,739	\$ 278,739	100%	\$ 13,739	Shifted from General Administration
Measurement & Evaluation	\$ 3,832	\$ 374	\$ 4,206	\$ 18,605	23%		
Regulatory Compliance	\$ 188,042	\$ 22,783	\$ 210,825	\$ 318,250	66%		
General Administration	\$ 475,939	\$ 58,152	\$ 534,091	\$ 747,761	71%	\$ (13,739)	Shifted to CHANGES
CPUC Energy Division	\$ 16,401	\$ 2,018	\$ 18,420	\$ 69,925	26%		
TOTAL Program Costs	\$ 5,498,244	\$ 668,710	\$ 6,166,953	\$ 6,922,453	89%	\$ -	
CARE Rate Discount ³	\$ 223,862,169	\$ 30,192,473	\$ 254,054,642	\$ 202,685,986	125%	\$ -	
Service Establishment Charge Discount	\$ -	\$ -	\$ -	\$ -	0%	\$ -	
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 229,360,413	\$ 30,861,183	\$ 260,221,595	\$ 209,608,439	124%	\$ -	

¹ Reflects total authorized budget approved in Decision (D.) 21-06-015, Attachment 1, Table 2, adjusted for program year 2023 fund shifts as noted in footnote 2.

² Reflects fund shift in accordance with the rules set forth in D.08-11-031 as modified by D.10-10-008, D. 10-16-11-022, D 17-12-009 and D.21-06-015, which granted the IOUs authority to shift funds between the CARE program categories.

³ CARE Rate Discount budget amount reflected in Advice Letters 4084-E & 3137-G, effective January 1, 2023

CARE Table 2 - CARE Enrollment, Recertification, Attrition, & Penetration
San Diego Gas & Electric
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	New Enrollment										Recertification						Attrition (Drop Outs)				Enrollment				Total CARE Participants by Dwelling Type			Total CARE Participants ^{1,2,3}	Estimated CARE Eligible	Enrollment Rate % (W/C)					
	Automatic Enrollment				Self-Certification (Income or Categorical)				Total New Enrollment (F+G)		Scheduled		Non-Scheduled (Duplicated)		Automatic	Total Recertification (L+M+N)		No Response ⁴	Failed PEV	Failed Recertification		Other	Total Attrition (P+Q+R+S)		Gross (C+R)		Net Adjusted (K-T)				SF			MH	
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capital	Combined (F+G+H+I)	Total	Scheduled	Non-Scheduled (Duplicated)	Automatic	Total Recertification (L+M+N)	No Response ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (C+R)	Net Adjusted (K-T)	SF	MF	MH											
January	6	5	0	11	3,510	197	256	88	4,051	4,062	2,608	5,316	589	8,513	3,948	18	-3	9,149	13,112	12,578	-2,307	109,287	97,233	8,957	346,547	301,966	115%								
February	1	33	0	33	3,566	330	480	123	4,079	4,082	3,786	4,025	782	7,968	3,709	15	-2	7,976	14,098	13,608	-2,400	109,287	97,657	8,872	348,854	301,966	116%								
March	59	101	0	160	4,772	422	476	127	5,797	5,957	4,272	4,083	500	8,815	2,383	13	-1	9,249	5,444	14,772	33	200,017	97,261	8,983	349,163	301,966	116%								
April	0	32	0	32	3,378	371	285	115	4,149	4,181	3,341	2,291	409	5,842	3,288	23	0	2,215	5,526	10,022	-1,345	199,251	96,692	8,996	347,823	301,966	115%								
May	60	8	0	68	4,310	216	397	107	5,030	5,098	3,953	2,297	718	6,968	4,880	28	379	2,027	7,314	12,666	-2,216	197,869	95,756	9,022	345,602	301,966	114%								
June	21	25	0	46	3,760	233	333	112	4,438	4,484	3,341	2,200	417	5,758	4,929	16	258	3,384	8,637	10,242	-4,153	195,209	94,612	8,959	341,446	301,966	113%								
July	38	53	0	91	3,900	286	346	119	4,651	4,742	3,880	2,297	751	5,028	6,265	26	171	2,692	9,314	9,770	-4,412	192,402	93,180	9,031	337,032	301,966	112%								
August	0	61	0	61	5,290	362	627	158	6,437	6,498	4,682	2,759	653	6,874	3,524	37	255	3,123	6,939	13,372	-441	192,382	92,946	8,946	336,953	301,966	111%								
September	6	63	0	69	6,307	385	594	166	7,426	7,524	5,865	3,948	1,039	8,237	4,618	29	1,039	2,747	10,442	10,829	-3,482	192,382	93,899	8,946	336,953	301,966	112%								
October	0	87	2	89	4,893	452	362	131	5,638	5,927	3,924	2,338	870	7,132	3,992	30	375	1,965	6,162	13,059	-235	193,026	93,190	8,915	337,935	301,966	112%								
November	27	23	0	50	4,809	340	440	100	5,588	5,974	3,833	2,228	924	7,543	3,682	16	820	1,290	6,038	13,297	-284	192,438	93,069	8,865	337,432	301,966	112%								
December	0	39	0	39	5,152	259	456	114	5,981	6,020	4,321	2,532	1,102	7,955	4,087	9	380	1,305	5,781	13,975	29	192,155	92,950	8,736	336,819	301,966	112%								
YTD Total	229	547	8	784	55,847	3,983	5,184	1,454	66,468	67,252	40,639	34,521	8,748	83,908	45,745	260	2,461	36,471	84,937	151,160	-17,685	192,155	92,958	8,736	336,819	301,966	112%								

¹ Enrollments via data sharing between the IOUs.² Enrollments via data sharing between departments and/or programs within the utility.

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

⁴ No response includes no response to both Recertification and Verification

⁵ SDG&E notes that it discovered a 5,862 YTD discrepancy in total CARE participants, which is explained by a system cleanup effort. The discrepancy has been corrected and the total CARE participants

⁶ SDG&E has completed its assessment of the LIHEAP auto-enrollment item and has included a summary of its findings in the narrative section 2.6.1 of the 2023 Low Income Annual Report.

**CARE Table 3 - CARE Post-Enrollment Verification Results
San Diego Gas & Electric
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CARE Table 3A - Post-Enrollment Verification Results (Model) 2023

Month	Total CARE Households Enrolled ⁵	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	% of Scheduled Customers not Responsive to the PEV Process	% of Scheduled PEV Customers later verified as Income Eligible	% of De-enrolled Customer Later Re-enrolled by Six Months	% of De-enrolled Customer Later Re-enrolled by Twelve Months	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
January	346,547	2,934	0.85%	60.16%	11.42%	19.89%	23.27%	1,765	40	1,805	62%	0.52%
February	348,854	2,150	0.62%	62.37%	11.91%	19.49%	21.91%	1,341	19	1,360	63%	0.39%
March	349,163	2,169	0.62%	60.40%	13.23%	19.98%	20.36%	1,310	21	1,331	61%	0.38%
April	347,823	2,167	0.62%	62.48%	12.69%	19.56%	19.56%	1,354	21	1,375	63%	0.40%
May	345,602	2,676	0.77%	60.65%	11.88%	17.77%	17.77%	1,623	26	1,649	62%	0.48%
June	341,446	2,162	0.63%	60.13%	11.79%	17.21%	17.21%	1,300	25	1,325	61%	0.39%
July	337,032	2,693	0.80%	58.08%	11.70%	15.08%	15.08%	1,564	28	1,592	59%	0.47%
August	336,593	2,158	0.64%	59.68%	11.86%	10.91%	10.91%	1,288	23	1,311	61%	0.39%
September	338,182	2,127	0.63%	59.43%	13.68%	10.61%	10.61%	1,264	37	1,301	61%	0.38%
October	337,935	549	0.16%	61.20%	11.29%	8.16%	8.16%	336	7	343	62%	0.10%
November	337,432	21	0.01%	28.57%	9.52%	0.00%	0.00%	6	0	6	29%	0.00%
December	336,819	31	0.01%	22.58%	12.90%	0.00%	0.00%	7	1	8	26%	0.00%
YTD Total	336,819	21,837	6.48%	59.52%	12.16%	16.83%	17.58%	12,997	246	13,243	61%	3.92%

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

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

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

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

⁵ SDG&E has completed its assessment of the LIHEAP auto-enrollment issue and has included a summary of its findings in the narrative section 2.6.1 of the 2023 Low Income Annual Report.

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

Month	Total CARE Households Enrolled ⁴	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	% of Scheduled Customers not Responsive to the PEV Process	% of Scheduled PEV Customers later verified as Income Eligible	% of De-enrolled Customer Later Re-enrolled by Six Months	% of De-enrolled Customer Later Re-enrolled by Twelve Months	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through HUV Post Enrollment Verification	% of Total CARE Households De-enrolled
January	346,547	273	0.08%	67.03%	0.00%	23.59%	29.74%	183	12	195	71%	0.06%
February	348,854	445	0.13%	67.19%	0.00%	17.61%	23.26%	299	2	301	68%	0.09%
March	349,163	472	0.14%	70.97%	0.00%	13.95%	16.02%	335	2	337	71%	0.10%
April	347,823	160	0.05%	68.75%	0.63%	18.75%	18.75%	110	2	112	70%	0.03%
May	345,602	74	0.02%	63.51%	0.00%	12.24%	12.24%	47	2	49	66%	0.01%
June	341,446	84	0.02%	65.48%	0.00%	12.73%	12.73%	55	0	55	65%	0.02%
July	337,032	228	0.07%	72.37%	0.00%	18.45%	18.45%	165	3	168	74%	0.05%
August	336,593	695	0.21%	65.32%	0.00%	12.99%	12.99%	454	8	462	66%	0.14%
September	338,182	633	0.19%	65.88%	0.00%	13.62%	13.62%	417	9	426	67%	0.13%
October	337,935	398	0.12%	65.58%	0.00%	10.19%	10.19%	261	4	265	67%	0.08%
November	337,432	164	0.05%	56.71%	0.00%	8.25%	8.25%	93	4	97	59%	0.03%
December	336,819	176	0.05%	25.00%	0.00%	4.44%	4.44%	44	1	45	26%	0.01%
YTD Total	336,819	3,802	1.13%	64.78%	0.03%	14.57%	16.00%	2,463	49	2,512	66%	0.75%

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

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

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

⁴ SDG&E has completed its assessment of the LIHEAP auto-enrollment item and has included a summary of its findings in the narrative section 2.6.1 of the 2023 Low Income Annual Report.

CARE Table 4 - CARE Self-Certification and Self-Recertification Applications¹
San Diego Gas & Electric
Program Year 2023 Annual Report

	Provided²	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total (Y-T-D)	6,500	144,959	106,223	4,660	10,739	23,337
Percentage		100%	73%	3%	7%	16%

¹ Includes sub-metered customers.

² Includes paper applications only. The Provided value is a combination of both CARE and FERA applications sent to customers.

CARE Table 5 - CARE Enrollment by County
San Diego Gas & Electric
Program Year 2023 Annual Report

County	Estimated Eligible ²			Total Participants ³			Enrollment Rate ^{4, 5}		
	Urban	Rural ¹	Total	Urban	Rural	Total	Urban	Rural	Total
Orange	16,746	0	16,746	15,822	0	15,822	94%	0%	94%
San Diego	278,595	6,625	285,220	313,713	7,284	320,997	113%	110%	113%
Total	295,341	6,625	301,966	329,535	7,284	336,819	112%	110%	112%

¹ Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.

² In accordance with Ordering Paragraph 189 of D.21-06-015, Annual CARE Eligibility Estimates filed February 12 of each year.

³ Total Households Enrolled includes submeter tenants.

⁴ Penetration Rate and Enrollment Rate are the same value.

⁵ SDG&E has completed its assessment of the LIHEAP auto-enrollment item and has included a summary of its findings in the narrative section 2.6.1 of the 2023 Low Income Annual Report.

CARE Table 6 - CARE Recertification Results
San Diego Gas & Electric
Program Year 2023 Annual Report

2023	Total CARE Households ⁵	Households Requested to Recertify ¹	% of Households Total (C/B)	Households Recertified ²	Households De-enrolled ³	Recertification Rate % ⁴ (E/C)	% of Total Households De-enrolled (F/B)
January	346,547	7,269	2.1%	3,316	3,193	46%	0.92%
February	348,854	7,616	2.2%	3,746	3,099	49%	0.89%
March	349,163	10,970	3.1%	4,687	5,118	43%	1.47%
April	347,823	5,175	1.5%	2,218	2,439	43%	0.70%
May	345,602	4,611	1.3%	2,145	1,869	47%	0.54%
June	341,446	5,394	1.6%	2,350	2,320	44%	0.68%
July	337,032	4,895	1.5%	2,403	1,851	49%	0.55%
August	336,593	7,848	2.3%	3,737	3,090	48%	0.92%
September	338,182	7,873	2.3%	3,579	3,235	45%	0.96%
October	337,935	11,552	3.4%	5,242	3,508	45%	1.04%
November	337,432	11,819	3.5%	5,037	605	43%	0.18%
December	336,819	10,190	3.0%	2,675	284	26%	0.08%
YTD	336,819	95,212	28.27%	41,135	30,611	43%	9.09%

¹ Excludes count of customers recertified through the probability model.

² Recertification results are tied to the month initiated and the recertification process allows customers 120 days (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.

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

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

⁵ SDG&E has completed its assessment of the LIHEAP auto-enrollment item and has included a summary of its findings in the narrative section 2.6.1 of the 2023 Low Income Annual Report.

**CARE Table 7 - CARE Capitation Contractors
San Diego Gas & Electric
Program Year 2023 Annual Report**

Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments ²			Total Expenditures
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
211 SAN DIEGO		X			36	1,363	1,399	\$ 27,980
211 ORANGE COUNTY		X			-	4	4	\$ 80
ALPHA MINI MART	X				-	12	12	\$ 360
AMERICAN RED CROSS WIC OFFICES		X	X		-	-	-	\$ -
BACKCOUNTRY COMMUNITIES THRIVING	X	X						\$ -
CHALDEAN COMMUNITY COUNCIL		X	X		1	51	52	\$ 1,560
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	10	10	\$ 300
COMMUNITY RESOURCE CENTER		X			-	-	-	\$ -
ELDERHELP OF SAN DIEGO		X			-	-	-	\$ -
HEARTS AND HANDS WORKING TOGETHER		X			-	-	-	\$ -
INTERFAITH COMMUNITY SERVICES		X			-	-	-	\$ -
LA MAESTRA FAMILY CLINIC		X			-	32	32	\$ 960
MAAC PROJECT		X		X	-	1	1	\$ 30
NEIGHBORHOOD HEALTH CARE		X			-	9	9	\$ 270
NORTH COUNTY HEALTH PROJECT, INC.	X				-	3	3	\$ 90
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	2	2	\$ 60
SAN YSIDRO HEALTH CENTERS		X			-	7	7	\$ 210
SCRIPPS HEALTH WIC		X			-	2	2	\$ 60
SOMALI BANTU ASSOCIATION OF AMERICA		X			-	-	-	\$ -
SOMALI FAMILY SERVICES		X			-	-	-	\$ -
UNION OF PAN ASIAN COMMUNITIES		X	X		-	-	-	\$ -
VISTA COMMUNITY CLINIC		X			-	2	2	\$ 60
Total Enrollments and Expenditures					37	1,498	1,535	\$ 32,020

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

² Enrollments reflect new enrollments only.

**CARE Table 8 - CARE Participants as of Month-End
San Diego Gas & Electric
Program Year 2023 Annual Report**

2023	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Enrollment Rate ¹	% Change
January	204,155	0	142,392	346,547	301,966	115%	-2.55%
February	205,697	0	143,157	348,854	301,966	116%	0.67%
March	206,062	0	143,101	349,163	301,966	116%	0.09%
April	205,255	0	142,568	347,823	301,966	115%	-0.38%
May	203,859	0	141,743	345,602	301,966	114%	-0.64%
June	201,042	0	140,404	341,446	301,966	113%	-1.20%
July	198,332	0	138,700	337,032	301,966	112%	-1.29%
August	198,098	0	138,495	336,593	301,966	111%	-0.13%
September	198,757	0	139,425	338,182	301,966	112%	0.47%
October	198,387	0	139,548	337,935	301,966	112%	-0.07%
November	197,786	0	139,646	337,432	301,966	112%	-0.15%
December	197,442	0	139,377	336,819	301,966	112%	-0.18%

¹ SDG&E has completed its assessment of the LIHEAP auto-enrollment item and has included a summary of its findings in the narrative section 2.6.1 of the 2023 Low Income Annual Report.

CARE Table 9 - CARE Average Monthly Usage & Bill
San Diego Gas & Electric
Program Year 2023 Annual Report

Average Monthly Gas / Electric Usage			
Residential Non-CARE vs. CARE Customers			
Customer	Gas Therms	Gas Therms	Total
	Tier 1	Tier 2	
Non-CARE	15.1	10.8	25.8
CARE	15.0	6.6	21.6
Customer	Electric KWh	Electric KWh	Total
	Tier 1	Tier 2 and Above	
Non-CARE	264	98	362
CARE	281	74	354

Average Monthly Gas / Electric Bill ²		
Residential Non-CARE vs. CARE Customers¹		
(Dollars per Customer)		
Customer	Gas	Electric
Non-CARE	\$70.46	\$159.56
CARE	\$43.58	\$94.99

¹ Excludes master-meter usage.

² Average Monthly Gas/Electric Bill reflects residential Non-CARE (CARE) 2023 total billed.

CARE Table 10 - CARE Surcharge & Revenue
San Diego Gas & Electric
Program Year 2023 Annual Report

CARE Table 10A					
CARE Electric Surcharge and Revenue Collected by Customer Class					
Customer	Average Monthly		CARE Surcharge	Total CARE Surcharge Revenue	Percentage of CARE Surcharge
Class	CARE Surcharge ¹	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential	\$ 6.37	\$ 173	3.68%	\$ 67,131,837	27.12%
Commercial	\$ 25.50	\$ 590	5.16%	\$ 38,192,712	64.07%
Agricultural	\$ 139.93	\$ 2,391	5.85%	\$ 5,801,083	2.34%
Large/Indust	\$ 666.68	\$ 12,561	15.02%	\$ 120,392,665	6.47%
CARE Table 10B					
CARE Gas Surcharge and Revenue Collected by Customer Class					
Customer	Average Monthly		CARE Surcharge	Total CARE Surcharge Revenue	Percentage of CARE Surcharge
Class	CARE Surcharge ²	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential	\$ 3.47	\$ 181	1.92%	\$ 27,590,285	66.54%
Commercial	\$ 28.09	\$ 754	3.73%	\$ 10,027,812	24.19%
Natural Gas Vehicle	\$ 2,486.91	\$ 38,466	6.47%	\$ 1,392,675	3.36%
Industrial	\$ 4,355.48	\$ 27,266	15.97%	\$ 2,452,141	5.91%

¹ Excludes CARE customers. Pursuant to D.15-07-001, OP 4 and Section 11.1.1 authorizes adjustments to CARE to transition to the legislatively-mandated CARE discount range in compliance with Section 739.1 were authorized. Effective 9/1/15 per AL 2783-E, CARE customers receive non-CARE rates; therefore, there is no longer a CARE Rate subsidy.

² Excludes CARE customers.

CARE Table 11 - CARE Capitation Applications ¹
San Diego Gas & Electric
Program Year 2023 Annual Report

Entity	Total Received	Approved ²	Denied	Pending/ Never Completed	Duplicate
211 SAN DIEGO	2,849	1,703	30	276	840
ALPHA MINI MART	144	20	0	5	119
ALLIANCE FOR AFRICAN ASSISTANCE	0	0	0	0	0
AMERICAN RED CROSS	4	0	0	4	0
CATHOLIC CHARITIES	0	0	0	0	0
CHILDREN'S INITIATIVE	0	0	0	0	0
CHULA VISTA COMMUNITY COLLABORATIVE	16	12	0	4	0
COMMUNITY HOUSING WORKS	0	0	0	0	0
COMMUNITY RESOURCE CENTER	6	0	0	6	0
CRISIS HOUSE	0	0	0	0	0
DEAF COMMUNITY SERVICES	0	0	0	0	0
FAMILY HEALTH CENTERS OF SAN DIEGO	0	0	0	0	0
HEARTS AND HANDS TOGETHER	1	1	0	0	0
HOME START	1	1	0	0	0
HORN OF AFRICA	0	0	0	0	0
INTERFAITH COMMUNITY	0	0	0	0	0
LA MAESTRA FAMILY CLINIC	51	39	1	11	0
MAAC PROJECT - CARE	13	4	0	9	0
NEIGHBORHOOD HEALTH CARE	21	17	0	4	0
NEIGHBORHOOD HEALTH INSURANCE CENTER	0	0	0	0	0
NORTH COUNTY HEALTH SERVICES	9	3	0	6	0
SAN DIEGO STATE UNIVERSITY WIC	7	2	0	5	0
SAN YSIDRO HEALTH CENTERS	18	10	0	8	0
SCRIPPS HEALTH WIC (SHW)	5	3	0	2	0
VISTA COMMUNITY CLINIC	4	2	0	2	0
Total	3,149	1,817	31	342	959

¹ Includes sub-metered customers.

² Includes new enrollments and recertification applications approved.

**CARE Table 12 - CARE Expansion Program
San Diego Gas & Electric
Program Year 2023 Annual Report**

CARE Table 12A Participating Facilities by Month						
2023	Gas			Electric		
	CARE Residential Facilities	CARE Commercial Facilities	Total Gas ²	CARE Residential Facilities	CARE Commercial Facilities	Total Electric ²
January	203	105	308	536	178	714
February	200	103	303	534	177	711
March	200	103	303	541	177	718
April	203	104	307	529	172	701
May	214	110	324	547	188	735
June	222	111	333	564	186	750
July	167	79	246	465	137	602
August	110	52	162	349	93	442
September	113	51	164	346	92	438
October	113	53	166	371	84	455
November	113	53	166	371	90	461
December	115	51	166	359	89	448

CARE Table 12B Average Monthly Gas / Electric Usage¹		
Customer	Gas	Electric
	Therms	KWh
Residential Facilities	39	359
Commercial Facilities	469	10,624

CARE Table 12C Expansion Self-Certification and Self-Recertification Applications					
	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	90	66	2	22	0
Percentage		73%	2%	24%	0%

¹ Excludes master meter usage.

² Includes satellite accounts enrolled and/or removed.

CARE Table 13 - CARE High Usage Verification Results ⁵
San Diego Gas & Electric
Program Year 2023 Annual Report

Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring		
Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) ¹	Income Verified and Referred to ESA	Failed and Removed ²	Ineligible ³	Completed	Removed ⁴	Appeals Denied	Appeals Approved
3,802	2,463	49	506	3	506	0	0	0	0

¹ Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.

² Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms.

³ Includes customers who previously participated in ESA Program, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.

⁴ High usage is defined as a customer that exceeds 400% of baseline.

CARE Table 14 - CARE Customer Usage and ESA Program Treatment
San Diego Gas & Electric
Program Year 2023 Annual Report

Marketing Campaign *	# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV ¹	Percent of those CARE customers Not served by ESA Program ³	# of Enrollments led to ESA Program measure Installations ⁴	# of Long-Term tenancy CARE customers who have Not applied for ESA Program ²	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment				Energy Usage of CARE customers who do Not accept ESA Program treatment ⁹
					Energy Usage before ESA Program treatment ⁵	Energy Usage within 3-months of ESA Program treatment ⁶	Energy Usage within 6-months of ESA Program treatment ⁷	Energy Usage within 12-months of ESA Program treatment ⁸	
May 2023	14,403	85%	417	12,290	645 kWh	640 kWh	629 kWh	N/A	602kWh
October 2023	12,631	82%	123	10,390	647kWh	664 kWh	N/A	N/A	633kWh

May 2023 Campaign metric:

*SDG&E conducted two marketing campaigns to target high energy usage long-term CARE customers who have not been treated by ESA. The metrics for each campaign have been separated to illustrate the results more clearly.

¹ As of May 2023, there were 14,403 CARE accounts identified as customers who have been on the CARE rate at the same meter for a least six years and have 90th Percentile of high usage.

² Those CARE customers who did not participate in the ESA Program as of May 2023: 12,290

³ Percentage of CARE customers not served by ESA: $*2/*1(12290/14403=85\%)$

⁴ Among the 12,290 accounts, 417 accounts enrolled as of Feb 2024.

⁵ Average monthly kWh in 12 months prior to ESA enrollment. Usage starting and ending month vary on accounts depending on ESA enrollment dates: 645 kWh

⁶ Average monthly kWh 3 months after ESA enrollment: 640 kWh

⁷ Average monthly kWh 6 months after ESA enrollment: 629 kWh (only included accounts who received ESA treatments for 6 months)

⁸ Average monthly kWh 12 months after ESA enrollment. N/A - since those customers just had ESA since May 2023 or later

⁹ Among 11,873 (12,290-417-123)accounts, average monthly kWh is 602 kWh.

Oct 2023 Campaign metric:

¹ As of Oct 2023, there were 12,631 CARE accounts identified as customers who have been on CARE rate at the same meter for a least six years and have 90th Percentile of high usage.

² Those CARE customers who did not participate in the ESA Program as of Oct 2023: 10390

³ Percentage of CARE customers not served by ESA: $*2/*1(10390/12631=82\%)$

⁴ Among the 10,390 accounts, 123 accounts enrolled as of Feb 2024.

⁵ Average monthly kWh in 12 months prior to ESA enrollment. Usage starting and ending month vary on accounts depending on ESA enrollment dates: 647 kWh

⁶ Average monthly kWh 3 months after ESA enrollment: 664 kWh

⁷ Average monthly kWh 6 months after ESA enrollment. N/A - since those customers just had ESA since Oct 2023 or later

⁸ Average monthly kWh 12 months after ESA enrollment. N/A - since those customers just had ESA since Oct 2023 or later

⁹ Among 10,267 (10390-123) accounts, average monthly kWh is 633 kWh.

CARE Table 15 - CARE Categorical Enrollment
San Diego Gas & Electric
Program Year 2023 Annual Report

Type of Enrollment	Number of Customer Enrollments¹
Bureau of Indian Affairs General Assistance	65
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	18,132
CalWORKs/Temporary Assistance for Needy Families (TANF) ²	1,855
Head Start Income Eligible - (Tribal Only)	132
Healthy Families A&B	13
Low-income Home Energy Assistance Program (LIHEAP)	1,053
Medicaid/Medi-Cal	33,148
National School Lunch Program (NSLP) - Free Lunch	9,688
Supplemental Security Income (SSI)	5,474
Tribal TANF ²	0
Women, Infants, and Children Program (WIC)	4,740

¹ Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.

² CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.

**CARE Table 16 - CARE and Disadvantaged Communities Enrollment Rate for Zip Codes
San Diego Gas & Electric
Program Year 2023 Annual Report**

Total CARE Households Enrolled				
Month	CARE Enrollment Rate for Zip Codes that have 10% or more disconnections	CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG)	CARE Enrollment Rate for Zip Codes in High Poverty (with 70% or Less CARE Penetration)	CARE Enrollment Rate for DAC (Zip/Census Tract) Codes in High Poverty (with 70% or Less CARE Enrollment Rate)
January	N/A	117%	65%	N/A
February	N/A	117%	66%	N/A
March	N/A	117%	67%	N/A
April	N/A	117%	67%	N/A
May	N/A	116%	67%	N/A
June	N/A	114%	66%	N/A
July	N/A	112%	63%	N/A
August	N/A	112%	63%	N/A
September	N/A	112%	64%	N/A
October	N/A	112%	64%	N/A
November	N/A	112%	64%	N/A
December	N/A	112%	64%	N/A
YTD	N/A	112%	64%	N/A

Notes:

Penetration Rate and Enrollment Rate are the same value.

DACs are defined at the census tract level. Corresponding zip codes are provided for the purpose of this table; however, the entire zip code listed may not be considered a DAC.

**FERA Table 1 - FERA Overall Program Expenses
San Diego Gas & Electric
Program Year 2023 Annual Report**

Category	Overall Expenditures		Total	Authorized Budget ¹	% of Budget Spent	Total Shifted ²	Shifted to/from?
	Electric	Gas					
Marketing, Education, & Outreach	\$ 388,638		\$ 388,638	\$ 388,638	100%	\$ 23,947	Shifted from Measurement & Evaluation
Processing, Certification, Recertification	\$ 18,223		\$ 18,223	\$ 18,223	100%	\$ 4,834	Shifted from Measurement & Evaluation
Post Enrollment Verification	\$ 8,726		\$ 8,726	\$ 8,726	100%	\$ 7,757	Shifted from Measurement & Evaluation
IT Programming	\$ 9,766		\$ 9,766	\$ 53,045	18%		
Pilots	\$ -		\$ -	\$ -	0%		
Measurement & Evaluation	\$ -		\$ -	\$ 12,957	0%	\$ (37,043)	Shifted to Marketing, Education, & Outreach; Processing, Certification, Recertification, Post Enrollment Verification, and Regulatory Compliance
Regulatory Compliance	\$ 46,425		\$ 46,425	\$ 46,425	100%	\$ 505	Shifted from Measurement & Evaluation
General Administration	\$ 45,945		\$ 45,945	\$ 73,891	62%		
CPUC Energy Division	\$ 2,366		\$ 2,366	\$ 10,488	23%		
TOTAL Program Costs	\$ 520,090	\$ -	\$ 520,090	\$ 612,393	85%	\$ 0	
FERA Rate Discount ³	\$ 4,670,344		\$ 4,670,344	\$ 4,170,665	112%	\$ -	
Service Establishment Charge Discount	\$ -		\$ -	\$ -	0%	\$ -	
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 5,190,434	\$ -	\$ 5,190,434	\$ 4,783,058	109%	\$ 0	

¹ Reflects total authorized budget approved in Decision (D.) 21-06-015, Attachment 1, Table 4, adjusted for program year 2023 fund shifts as noted in footnote 2.

² Reflects fund shift in accordance with the rules set forth in D.21-06-015, which granted the IOUs authority to shift funds between the FERA program categories.

³ FERA Rate Discount budget amount as reflected in Advice Letter 4084-E, effective January 1, 2023.

FERA Table 2 - FERA Enrollment, Recertification, Attrition, & Penetration
 San Diego Gas & Electric
 Program Year 2023 Annual Report

Feb	New Enrollment									Recertification				Attrition (Drop Offs)				Enrollment		Total FERA Participants by Dwelling Type			Total FERA Participants	Estimated FERA Eligible	Enrollment Rate (W/N)			
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+N)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response ¹	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-L)	Total FERA Participants by Dwelling Type						
	Inter-Utility ²	Intra-Utility ³	Leveraging ⁴	Combined (Bot+Dr)	Online	Paper	Phone	Capitation	Combined (H+G+H+I)													SF				MF	MH	
																											SF	MF
January	0	0	0	0	282	10	23	7	322	322	16	107	0	123	141	1	-3	92	231	445	91	8,229	4,153	79	12,339	11,953	29%	
February	0	0	0	0	214	9	31	3	257	257	24	52	0	76	135	1	-2	290	424	333	167	8,109	4,110	78	12,172	11,980	28%	
March	0	5	0	5	207	13	36	2	257	262	25	91	0	116	126	0	-1	199	327	178	45	8,070	4,077	75	12,107	11,969	28%	
April	0	2	0	2	160	2	18	1	181	183	29	39	0	66	134	0	0	180	314	249	131	7,986	4,035	74	11,976	11,903	28%	
May	0	0	0	0	174	3	13	1	191	191	27	31	0	58	213	2	104	135	456	249	265	7,815	3,955	69	11,711	11,603	27%	
June	0	4	0	4	161	10	15	2	188	192	17	46	0	63	242	0	105	136	483	255	291	7,624	3,872	65	11,420	11,360	27%	
July	0	7	0	7	194	12	14	3	223	230	23	48	0	71	239	3	89	133	464	301	234	7,467	3,791	64	11,186	11,106	26%	
August	0	5	0	5	260	9	26	4	299	304	39	55	0	94	146	0	126	161	433	398	129	7,401	3,763	60	11,057	10,985	26%	
September	0	3	0	3	290	7	19	3	319	322	20	47	0	67	162	0	112	115	389	389	67	7,555	3,758	59	10,990	10,903	26%	
October	0	4	1	5	217	10	13	2	242	247	28	46	0	72	185	0	136	87	408	339	161	7,223	3,718	60	10,829	10,769	25%	
November	0	5	0	5	251	8	19	3	281	286	35	29	0	62	221	0	149	123	484	348	195	7,053	3,649	57	10,653	10,585	25%	
December	0	4	0	4	223	9	22	2	257	261	31	31	0	62	241	0	113	110	464	352	281	6,538	3,631	55	10,425	10,365	24%	
YTD Total	0	39	1	40	2,633	102	249	33	3,017	3,057	309	421	0	930	1,190	7	919	1,761	4,877	3,987	1,820	6,538	3,631	85	18,428	17,990	24%	

¹ Enrollments via data sharing between the IOUs.

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

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

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

FERA Table 3 - FERA Post-Enrollment Verification Results
San Diego Gas & Electric
Program Year 2023 Annual Report

FERA Table 3A - Post-Enrollment Verification Results (Model)								
Month	Total FERA Households Enrolled	Households Requested to Verify ¹	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification ⁴	% of Total FERA Households De-enrolled
January	12,339	93	0.75%	70	0	70	75%	0.57%
February	12,172	67	0.55%	50	2	52	78%	0.43%
March	12,107	66	0.55%	47	0	47	71%	0.39%
April	11,976	66	0.55%	51	0	51	77%	0.43%
May	11,711	86	0.73%	62	0	62	72%	0.53%
June	11,420	31	0.27%	12	0	12	39%	0.11%
July	11,186	15	0.13%	0	0	0	0%	0.00%
August	11,057	7	0.06%	1	0	1	14%	0.01%
September	10,990	15	0.14%	0	0	0	0%	0.00%
October	10,829	2	0.02%	0	0	0	0%	0.00%
November	10,631	0	0.00%	0	0	0	0%	0.00%
December	10,428	0	0.00%	0	0	0	0%	0.00%
YTD Total	10,428	448	4.30%	293	2	295	66%	2.83%

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

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

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

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

FERA Table 3B - Post-Enrollment Verification Results (Electric only High Usage)								
Month	Total FERA Households Enrolled	Households Requested to Verify ¹	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification	% of Total FERA Households De-enrolled
January	12,339	0	0.00%	0	0	0	0%	0.00%
February	12,172	0	0.00%	0	0	0	0%	0.00%
March	12,107	0	0.00%	0	0	0	0%	0.00%
April	11,976	0	0.00%	0	0	0	0%	0.00%
May	11,711	0	0.00%	0	0	0	0%	0.00%
June	11,420	0	0.00%	0	0	0	0%	0.00%
July	11,186	0	0.00%	0	0	0	0%	0.00%
August	11,057	0	0.00%	0	0	0	0%	0.00%
September	10,990	0	0.00%	0	0	0	0%	0.00%
October	10,829	0	0.00%	0	0	0	0%	0.00%
November	10,631	0	0.00%	0	0	0	0%	0.00%
December	10,428	0	0.00%	0	0	0	0%	0.00%
YTD Total	10,428	0	0.00%	0	0	0	0%	0.00%

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

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

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

FERA Table 4 - FERA Self-Certifications, Self-Recertification Applications and Post-Enrollment Verifications
San Diego Gas & Electric
Program Year 2023 Annual Report

FERA Table 4A						
FERA Self-Certification and Self-Recertification Applications ¹						
	Provided ²	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	6,500	5,582	2,985	1,282	1,000	315
Percentage		100%	53%	23%	18%	6%

¹ Includes sub-metered customers.

² Includes paper applications only. The Provided value is a combination of both CARE and FERA applications sent to customers.

FERA Table 4B						
FERA Post-Enrollment Verification ¹						
	Requested	Received	Approved	Denied	Pending/Never Completed	
Total	448	155	153	2	293	

¹ Includes sub-metered customers.

FERA Table 5 - FERA Enrollment by County
San Diego Gas & Electric
Program Year 2023 Annual Report

County	Estimated Eligible			Total Participants			Enrollment Rate		
	Urban	Rural ¹	Total	Urban	Rural	Total	Urban	Rural	Total
Orange	2,331	-	2,331	434	-	434	19%	0%	19%
San Diego	39,417	1,232	40,649	9,745	249	9,994	25%	20%	25%
Total	41,748	1,232	42,980	10,179	249	10,428	24%	20%	24%

¹ Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.

FERA Table 6 - FERA Recertification Results
San Diego Gas & Electric
Program Year 2023 Annual Report

2022	Total FERA Households	Households Requested to Recertify ¹	% of Households Total (C/B)	Households Recertified ²	Households De-enrolled ³	Recertification Rate % ⁴ (E/C)	% of Total Households De-enrolled (F/B)
January	12,339	292	2.4%	34	232	12%	1.88%
February	12,172	297	2.4%	27	259	9%	2.13%
March	12,107	360	3.0%	31	293	9%	2.42%
April	11,976	209	1.7%	17	177	8%	1.48%
May	11,711	241	2.1%	20	208	8%	1.78%
June	11,420	314	2.7%	20	266	6%	2.33%
July	11,186	284	2.5%	17	248	6%	2.22%
August	11,057	476	4.3%	36	404	8%	3.65%
September	10,990	399	3.6%	30	281	8%	2.56%
October	10,829	390	3.6%	26	120	7%	1.11%
November	10,631	450	4.2%	20	94	4%	0.88%
December	10,428	477	4.6%	12	36	3%	0.35%
YTD	10,428	4,189	40.17%	290	2,618	7%	25.11%

¹ Excludes count of customers recertified through the probability model.

² Recertification results are tied to the month initiated and the recertification process allows customers 120 days (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.

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

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

FERA Table 7 - FERA Capitation Contractors
San Diego Gas & Electric
Program Year 2023 Annual Report

Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments ²			Total Expenditures
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
211 SAN DIEGO					-	23	23	\$ 460
ALPHA MINI MART					-	-	-	\$ -
AMERICAN RED CROSS WIC OFFICES					-	-	-	\$ -
CHULA VISTA COMMUNITY COLLABORATIVE					-	-	-	\$ -
COMMUNITY RESOURCE CENTER					-	-	-	\$ -
ELDERHELP OF SAN DIEGO					-	-	-	\$ -
HEARTS AND HANDS WORKING TOGETHER					-	-	-	\$ -
HOME START					-	-	-	\$ -
HORN OF AFRICA					-	-	-	\$ -
INTERFAITH COMMUNITY SERVICES					-	-	-	\$ -
LA MAESTRA FAMILY CLINIC					-	-	-	\$ -
MAAC PROJECT					-	-	-	\$ -
NEIGHBORHOOD HEALTH FERA					-	-	-	\$ -
NORTH COUNTY HEALTH PROJECT, INC.					-	-	-	\$ -
SAN DIEGO STATE UNIVERSITY WIC OFFICES					-	-	-	\$ -
SAN YSIDRO HEALTH CENTERS					-	-	-	\$ -
SCRIPPS HEALTH WIC					-	-	-	\$ -
SOMALI BANTU ASSOCIATION OF AMERICA					-	-	-	\$ -
SOMALI FAMILY SERVICES					-	-	-	\$ -
UNION OF PAN ASIAN COMMUNITIES (UPAC)					-	-	-	\$ -
Total Enrollments and Expenditures					-	23	23	\$ 460

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

² Enrollments reflect new enrollments only.

FERA Table 8 - FERA Average Monthly Usage & Bill
San Diego Gas & Electric
Program Year 2023 Annual Report

Average Monthly Electric Usage			
Residential Non-FERA vs. FERA Customers			
Customer	Electric KWh	Electric KWh	Total
	Tier 1	Tier 2 and Above	
Non-FERA	269.0	91.0	360.0
FERA	309.0	107.0	416.0

Average Monthly Electric Bill ²		
Residential Non-FERA vs. FERA Customers ¹		
(Dollars per Customer)		
Customer	Electric	
Non-FERA	\$140.84	
FERA	\$147.42	

¹ Excludes master-meter usage.

² Average Monthly Electric Bill reflects residential Non-FERA (FERA) 2023 total billed.

Appendix H – NMEC Results for ESA CAM

Electric Baseline Model Fit Statistics by Site

Site ID	NMBE	CV(RMSE)	FSU	R-Square	Meets Baseline Model Fit Criteria?	
C001	<0.001%	23%	3%	78%	Yes	
C002	<0.001%	12%	141%	96%	Almost	Outliers excluded, High FSU
C003	<0.001%	13%	3%	91%	Yes	
C004	<0.001%	10%	2%	91%	Yes	Outliers excluded
C005	<0.001%	9%	2%	65%	Yes	Weak r-squared
C006	<0.001%	10%	2%	86%	Yes	
C007	<0.001%	8%	2%	64%	Yes	Weak r-squared
C008	<0.001%	20%	4%	70%	Yes	Outliers excluded
C009	<0.001%	24%	26%	65%	Almost	High FSU, weak r-squared
C010	<0.001%	37%	8%	57%	No	Failed NMEC
C011	<0.001%	13%	67%	85%	Almost	High FSU
C012	<0.001%	13%	2%	76%	Yes	Outliers excluded
C013	<0.001%	18%	2%	87%	Yes	
C014	<0.001%	14%	1%	87%	Yes	
C015	<0.001%	8%	3%	62%	Yes	Weak r-squared
C016	<0.001%	-207%	7%	92%	Yes	
C017	<0.001%	15%	2%	86%	Yes	
C018	<0.001%	9%	20%	95%	Yes	Outliers excluded
C019	<0.001%	72%	5%	89%	No	Failed NMEC
C020	<0.001%	11%	43%	83%	Almost	High FSU
C021	<0.001%	12%	2789%	88%	Almost	High FSU
C022	<0.001%	11%	155%	83%	Almost	Outliers excluded, High FSU
C023	<0.001%	18%	4%	55%	Yes	Weak r-squared
C024	<0.001%	25%	20%	58%	Yes	Weak r-squared
C025	<0.001%	6%	23%	84%	Yes	
C026	<0.001%	20%	9%	61%	Yes	Weak r-squared
C027	<0.001%	9%	4%	52%	Yes	Weak r-squared (outliers excluded)
C028	<0.001%	301%	2%	90%	No	Failed NMEC
C029	<0.001%	7%	226%	77%	Almost	High FSU

Gas Baseline Model Fit Statistics by Site

Site ID	NMBE	CV(RMSE)	FSU	R-Square	Meets Baseline Model Fit Criteria?	
C015	<0.001%	25%	6%	83%	Yes	

Annual Electric Energy Savings from NMEC Analysis by Site

Site ID	Ex Ante kWh	Avoided kWh First Year	Normalized Energy Savings (kWh)	Realization Rate
C001	21,141	26,279	26,404	33%
C002	3,078	-37,896	-37,523	-6%
C003	15,430	-7,857	-7,400	-17%
C004	15,003	11,974	10,831	18%
C005	31,564	9,899	9,678	11%
C006	23,364	11,741	11,874	16%
C007	15,287	16,722	15,958	23%
C008	2,808	547	749	6%
C009	648	1,843	1,606	14%
C010	1,272	-1,510	-1,387	-26%
C011	1,213	-11,607	-12,093	-15%
C012	25,477	16,159	15,665	25%
C013	4,318	-3,246	-3,353	-28%
C014	27,221	15,416	15,101	40%
C015	13,705	13,120	12,955	14%
C016	10,714	-6,143	-5,623	80%
C017	25,377	12,830	12,482	24%
C018	18,177	-56,856	-53,741	-7%
C019	5,801	1,617	977	7%
C020	2,877	4,425	4,137	3%
C021	387	32,554	36,233	4%
C022	288	-790	-867	-1%
C023	5,888	2,456	2,339	6%
C024	2,340	115	292	1%
C025	12,771	-27,584	-28,069	-4%
C026	8,348	4,144	5,074	9%
C027	10,727	16,261	16,995	19%
C028	52,717	2,475	4,377	34%
C029	324	4,259	4,269	2%

Annual Gas Energy Savings from NMEC Analysis by Site

Site ID	Ex Ante kWh	Avoided kWh First Year	Normalized Energy Savings (kWh)	Realization Rate
C015	2,166	-787	-861	-41%

Appendix I – Revisions to SDG&E’s 2022 and 2021 Annual Reports

SDG&E discovered a discrepancy in November 2023 in the total number of CARE participants, caused by a system cleanup effort. The discrepancy was corrected and the total number of CARE participants per month was updated in SDG&E’s monthly November 2023 report.⁷⁹ SDG&E notes that this cleanup also affected 2022 and 2021 data. Revisions to CARE and FERA Table 2 in SDG&E’s 2022 and 2021 annual reports are provided below.

In October 2023, SDG&E found discrepancies where the Tribal and Disadvantaged Communities (DAC) Customer Segment flags used in its CIS system were not configured correctly from January to August 2023. The DAC flag discrepancy was resolved, and data reported correctly starting with SDG&E’s September 2023 Low Income Monthly Report filed on October 23, 2023. The DAC flag correction did not impact results prior to 2023. The Tribal flag discrepancy was resolved on November 17, 2023, and data was reported correctly starting with SDG&E’s November 2023 Low Income Monthly Report filed on December 21, 2023.⁸⁰ The Tribal Flag correction also affected 2022 and 2021 data. Revisions to ESAP Table 17 and ESAP Table 19 in SDG&E’s 2022 and 2021 Low Income Annual Reports, respectively, are provided below.

⁷⁹ Monthly Report of San Diego Gas & Electric Company on Low Income Assistance Programs for November 2023 (December 21, 2023) at CARE Table 2.

⁸⁰ *Id.* at ESA Table 7

San Diego Gas & Electric
Appendix I – Revisions to SDG&E's 2022 and 2021 Annual Reports

**California Alternate Rates for Energy (CARE) Program and
Family Electric Rate Assistance (FERA) Program
Corrections to CARE Table 2, 2022 and 2021 Low Income Annual Reports**

	Total New CARE Enrollment	Total CARE Recertification	Total CARE Attrition	Net Adjusted CARE Enrollment	Total CARE Participants	Estimated CARE Eligible	Enrollment Rate (%)
2022 Values when filed	71,561	59,404	33,465	38,096	355,600	289,316	123%
2022 Values post correction	68,853	60,344	34,504	34,349	351,853	289,316	122%
Change (%)	-4%	2%	3%	-10%	-1%	0%	-1%
2021 Values when filed	64,362	37,405	82,876	(18,514)	317,504	293,584	108%
2021 Values post correction	60,332	37,776	80,686	(20,013)	316,005	293,584	108%
Change (%)	-6%	1%	-3%	8%	0%	0%	0%

Corrections to FERA Table 2, 2022 Low Income Annual Report

	Total New FERA Enrollment	Total FERA Recertification	Total FERA Attrition	Net Adjusted FERA Enrollment	Total FERA Participants	Estimated FERA Eligible	Enrollment Rate (%)
2022 Values when filed	2,371	819	1,606	765	12,248	43,709	28%
2022 Values post correction	2,374	842	1,177	1,232	12,715	43,709	29%
Change (%)	0%	3%	-27%	61%	4%	0%	3%
2021 Values when filed ¹	N/A	N/A	N/A	N/A	11,206	40,118	28%
2021 Values post correction	N/A	N/A	N/A	N/A	11,206	40,118	28%
Change (%)	0%	0%	0%	0%			

¹New FERA enrollments, recertifications, attrition were not separately reported in 2021

**Energy Savings Assistance (ESA)
Corrections to ESA Customer Segments Table Tribal Flag, 2022 and 2021 Low Income Annual Reports
(Table 17 in 2022 Annual Report, Table 19 in 2021 Annual Report)**

	Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households	Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms)
2022 Values when filed	Tribal	21,716	86	0.40%	1,438	6%	226	230	0.03	-0.72	0.16	\$ 759	0.12	0
2022 Values post Tribal Flag fix	Tribal	21,716	4	0.02%	159	3%	183	183	0.02	0	0	\$ 290	0.01	0
Change (%)			-95%			-58%			-20%	-40%		-62%		
2021 Values when filed	Tribal	N/A	78	N/A	925	8%	203	216	0.003	0.09	0.278	\$ 602	N/A	N/A
2021 Values post Tribal Flag fix	Tribal	N/A	10	N/A	116	9%	231	-	0.002	-0.005	0	\$ 497	N/A	N/A
Change (%)			-87%			2%	14%		-4%			-18%		