

**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

**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 2024**

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June 27, 2025

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This report presents the 2024 program year results and expenditures for San Diego Gas & Electric Company's (SDG&E) Energy Savings Assistance (ESA), California Alternate Rates for Energy (CARE), and Family Electric Rate Assistance (FERA) Programs.¹ SDG&E submitted its FERA Annual Report on March 3, 2025, pursuant to Senate Bill (SB) 1130.²

This report provides the 2024 activity and results for the ESA, CARE and FERA Programs, and includes any additional updates for FERA not previously included in SDG&E's 2024 FERA Annual Report.³

On April 3, 2025, SDG&E and Southern California Gas Company (SoCalGas) requested an extension of time to comply with California Public Utilities Commission (Commission) Decision (D.) 21-06-015, which requires SDG&E and SoCalGas to submit Low-Income Program

¹ In accordance with D.21-06-015.

² Public Utilities Code Section 739.12 as amended by SB 1130 effective January 1, 2025. [California Code, PUC 739.12.](#)

³ Annual Report Activity of San Diego Gas & Electric Company on Family Electric Rate Assistance Program for 2024 (March 3, 2025).

Annual Reports by May 1 of each year, for the prior year's activities.⁴ On April 18, 2025, the Energy Division Executive Director authorized the extension for SDG&E and SoCalGas to file the 2024 Annual Report on July 1, 2025.⁵

Respectfully Submitted,

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⁴ See Request for Extension of Time Under Commission Rule 16.6 to Comply with Low-Income Annual Report Filing Deadline.

⁵ April 18, 2025 Letter from R. Peterson regarding Request for Extension of Time Under Commission Rule 16.6 to Comply with Low-Income Annual Report Filing Deadline.



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

2024 RESULTS

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2024 ESA, CARE, AND FERA ANNUAL REPORT EXECUTIVE SUMMARY

In 2024, SDG&E's portfolio of energy assistance programs demonstrated a strong commitment to enhancing program performance and customer impact through targeted outreach, process innovation, and adaptive implementation. Across the various programs, there was a focus on refining operational strategies, improving customer engagement, and responding to evolving challenges with agility and collaboration. The dedication of our program partners was instrumental in overcoming obstacles and driving progress.

The **ESA Main** Program saw a significant boost in performance, driven by the implementation of a new savings methodology, targeted outreach, and the launch of an online enrollment platform. Customer satisfaction improved notably, supported by a new survey initiative and strengthened contractor collaboration. However, the program also faced persistent challenges, including market saturation, system configuration hurdles, and workforce adaptation to a savings-based model.

The **ESA Southern Multifamily Whole Building** Program (MFWB) made key strides in the second half of the year, following contract amendments and improved subcontractor compensation. The development of a Policy & Procedure Manual and Installation Standards helped standardize delivery, while cross-utility coordination and Whole Building project completions underscored the program's growing maturity. Overcoming invoicing challenges and increasing subcontractor performance remained areas of focus.

The **Pilot Plus/Deep** Program (PPPD) concentrated on foundational setup and lead generation, with a focus on Disadvantaged Communities (DAC) and Tribal areas in late 2024. Despite a slower-than-expected ramp-up, the program successfully launched marketing campaigns and initiated partnerships to improve lead quality and customer engagement.

CARE continued its path toward enrollment normalization, with projections nearing 100% by mid-2025. The program maintained high customer satisfaction and operated efficiently within its administrative budget. Key updates included the discovery of a LIHEAP auto-enrollment requirement and an extended recertification cycle for Expanded CARE participants.

Family Electric Rate Assistance Program (FERA) achieved its highest enrollment levels since pre-COVID, thanks to innovative marketing strategies and the launch of a text messaging pilot.

The program sustained strong customer satisfaction, setting the stage for expanded digital engagement in 2025. The 2024 FERA Annual Report was filed on March 3, 2025.⁶

Together, these efforts reflect a unified strategy of continuous improvement, customer-centric design, and operational resilience—positioning SDG&E’s low-income assistance programs for even greater impact in the years ahead.

⁶ Annual Report of San Diego Gas & Electric Company on Family Electric Rate Assistance Program for 2024. (March 3, 2025)

ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

1 ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY

Summary of 2024 Results

The Energy Savings Assistance (ESA) Program demonstrated significant achievements across its core offerings during 2024, underscoring its continued role in supporting equity and energy savings goals. The ESA Main Program surpassed enrollment expectations, achieving 161% of its targeted number of homes treated. Energy savings also exceeded therms goals at 113% and reached 78% of projected kilowatt-hour (kWh) savings. The ESA Main Program delivered these outcomes using only 71% of its allocated administrative budget, reflecting a strong commitment to cost-effective management.

The ESA Main Program achieved 161% of targeted number of homes treated and exceeded the therm goal by 13%, while using only 71% of the 2024 administrative budget.

These results were enabled by the implementation of a new savings methodology, enhanced targeted outreach, and the successful launch of an online enrollment platform. Customer satisfaction improved notably, supported by a new survey initiative and strengthened collaboration with contractors. Despite these successes, the program continued to face market saturation challenges, system issues (including a cyber-attack on the ESA Main & ESA MFWB enrollment system), and a workforce still adapting to a performance-based model.

A key priority remains in the delivery of ongoing energy savings from homes treated in past program cycles. This focus reflects the program's commitment to long-term benefits for low-income customers and reinforces the value of prior investments.

The ESA MFWB Program made substantial progress during the second half of the year. Following contract amendments and updated subcontractor compensation structures, the program strengthened its delivery model through the development of a comprehensive Policy & Procedure Manual and standardized Installation Standards. The Southern MFWB Program achieved a combined 295 total enrollments and completed twelve Common Area Measure projects for a total of 11,803 tenant units served. Coordination across utility partners improved, and project completions demonstrated increasing maturity in whole-building implementation.

However, invoicing challenges and variability in subcontractor performance continued to require active management.

The PPPD Program concentrated on foundational development, with a focus on lead generation and engagement in DAC and Tribal areas in late 2024. While the initial ramp-up was slower than anticipated, the program successfully initiated marketing campaigns and forged new partnerships aimed at improving both customer awareness and the quality of enrollment leads. By year-end 2024, the PPPD Program had generated 484 leads from the two email campaigns, with 66 customers successfully enrolled. These early efforts are expected to support improved outcomes in future cycles.

Collectively, the ESA portfolio continues to evolve to meet emerging needs while remaining rooted in its mission to deliver meaningful and measurable energy savings to underserved households across SDG&E's service territory and beyond.

Procedural Background

On June 7, 2021, the Commission issued D.21-06-015, 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 region 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. It also 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 tailored marketing and outreach efforts to reach the program goals, including broadband outreach, and 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.

1.1 Energy Savings Assistance Program Overview

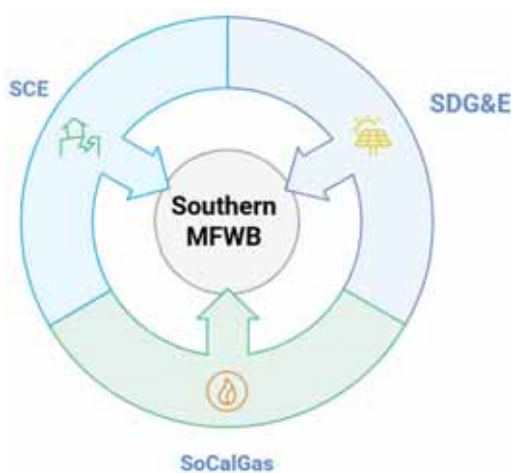
1.1.1 Provide a summary of the Energy Savings Assistance Program elements as approved in D.21-06-015.

The ESA Program portfolio offers no-cost weatherization services, energy efficient lighting, energy efficient appliances, energy education, and other services to income-qualified customers to reduce energy consumption and costs, while improving health, comfort, and safety of customers. To qualify for the ESA Program, a residential customer's household income must be at, or below, 250% of Federal Poverty Guidelines (FPG).

ESA Main

The ESA Main 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 benefits of health, comfort, and safety to low income customers. Richard Heath and Associates (RHA) is the implementer of ESA Main services including Outreach and Assessment, Weatherization, Appliance Installation, Natural Gas Appliance Testing (NGAT) and Inspections of gas appliance installation. Services under Heating Ventilation and Air Conditioning (HVAC) and Water Heater Repair and Replacement (R&R) are contracted with THA Heating Plumbing & Air and Staples Energy.

ESA MFWB



The ESA MFWB Program is designed to better serve the unique situations of low income multifamily building tenants in deed-restricted and non-deed restricted buildings by providing comprehensive energy efficiency measures and services to maximize efficiency of multifamily buildings through in-unit, common area, and whole building services. The MFWB Program is also known publicly as the Multifamily Energy Savings

Program (MFES).⁷ The ESA MFWB Program works to maximize a building’s demand response technologies, greenhouse gas reduction, water energy nexus, and the health, comfort, and safety of tenants. It is implemented by a third-party and regulated by the Commission as a sub-program of ESA.⁸

ESA PPPD

The aim of the PPPD Program is to assist low-income customers in achieving energy savings of 5-50%. Additionally, PPPD addresses the following secondary goals:

- *Equity*: Single family, mobile homeowners and renters;
- *Quality*: Spend more on fewer households, increasing the impact of the treatment;
- *Customer-centric*: A seamless program delivery with as many services provided in as few visits as possible;
- *Optimization*: Reduction in program administration, duplicative costs, and burdens to ratepayers; Maximize total funding to go towards program measures that save energy.



ESA Main Program 2024 Summary

ESA Table 1.1.1.1 below shows the total 2024 authorized budget, actual expenditures and percentage of spend for the ESA Main Program.

⁷ <https://mcp.customerapplication.com/>.

⁸ D.21-06-015, OP 118.

ESA Table 1.1.1.1
2024 ESA Main Program Summary^[a]

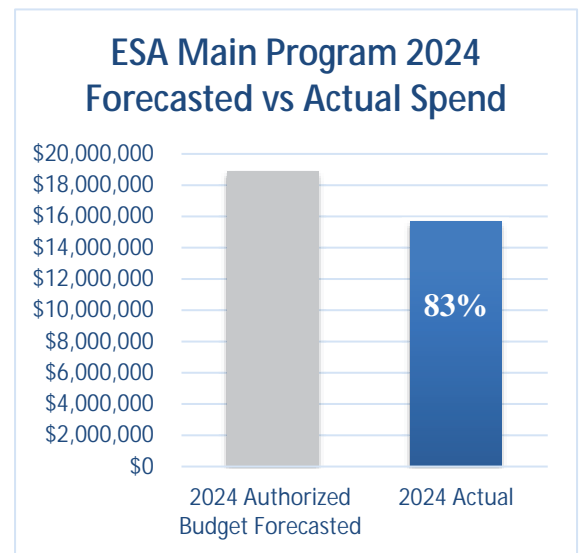
	2024 Authorized Budget / Forecasted Planning Assumptions	2024 Actual	%
Budget	\$18,876,805	\$15,699,907	83%
Administrative Budget ^[b]	\$4,700,340	\$3,319,408	71%
Homes Treated	3,983	6,406	161%
kWh Saved	1,496,098	1,167,957	78%
kW Demand Reduced	218	183	84%
Therms Saved	42,191	49,401	117%
GHG Emissions Reduced (Tons) ^[c]	N/A	1,046	N/A

[a] Includes SF, MH and MF In Unit (Jan-Jun 2024) treatments.

[b] Actual "Administrative" costs include all 'below-the-line' activities, which differ from 'administrative costs' subject to the 10% cap. ESA Program expenses subject to the 10% administrative cap follow the same definition and categorization of 'administrative costs' as the energy efficiency programs, as authorized in Section 6.15.7.7 of D.21-06-015. Refer to ESA Annual Report Table 1 for SD&GE's Admin Cap.

[c] Derived by utilizing the United States Environmental Protection Agency Greenhouse Gas Equivalencies Calculator.

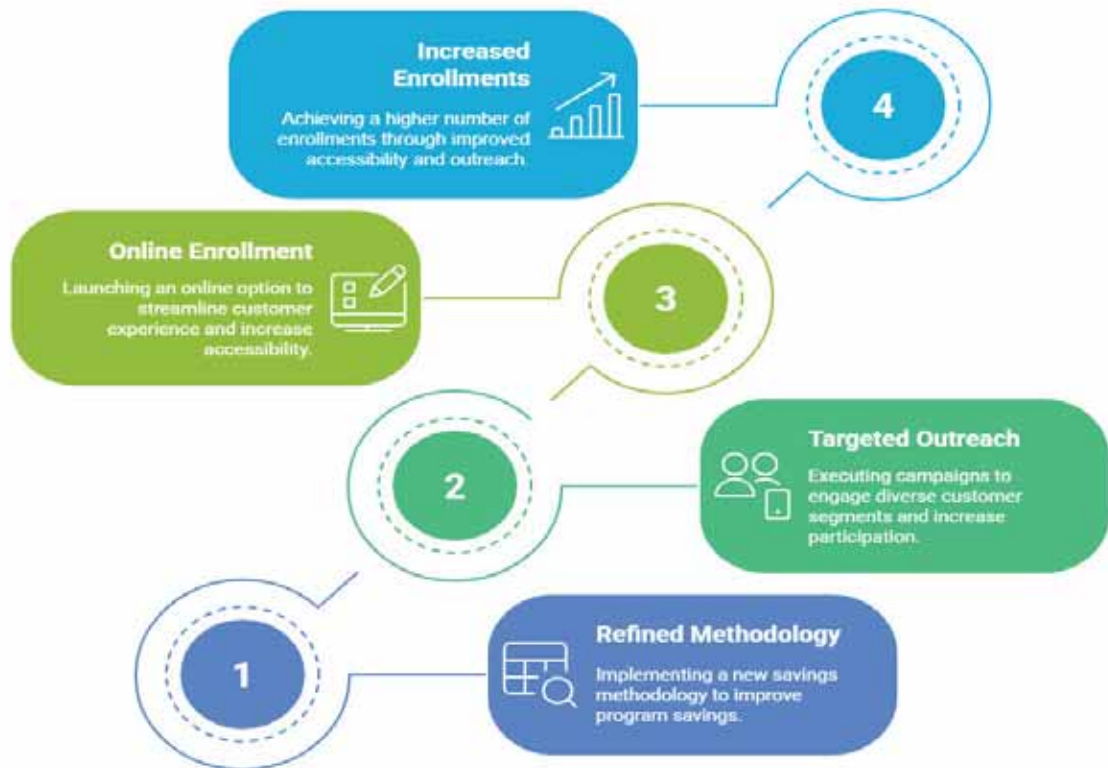
Program Year 2024 marked a year of significant advancements and notable achievements for the ESA Main Program. Through the implementation of innovative strategies and enhancements, SDG&E achieved measurable improvements in program performance and efficiency, despite facing challenges related to market conditions, operational adjustments, and external disruptions. Implementers' adaptability and dedication ensured progress toward meeting program goals as noted below:



Refined Savings Methodologies and Outreach Strategies

- Implemented a new, refined savings methodology resulting in improved program savings.⁹

2024 Strategies to Increase Program Savings



- Executed targeted outreach campaigns utilizing multicultural digital methods and advertisements that successfully engaged diverse customer segments, increasing

⁹ In 2024, SDG&E's Engineering Team recommended and instituted a change in the hierarchy of savings sources for the ESA portfolio of programs. Rather than prioritizing the results from the outdated 2015-2017 Impact Evaluation which did not have statistically adequate sample sizes for SDG&E territory, the priority was given to CPUC approved eTRM measures that utilized existing condition baseline and measures that had low income specific workpapers. This change allowed for a more appropriate representation of savings values for the SDG&E territory where homes were being treated. SDG&E presented the new low-income energy savings methodology to the ESA Policies and Procedures & Installation Standards (PP/IS) Manual Sub Working Group on June 12, 2024 and to the ESA Working Group on June 27, 2024.

awareness and participation (see section 1.2 below). These campaigns successfully targeted customers with high potential savings outcomes.

- Launched an online enrollment option, improving accessibility and streamlining the customer experience. The online enrollment form received over 14,600 views, resulting in approximately 1,300 responses. Of these, over 350 led to enrollments and approximately 125 were treated and weatherized.

Equipment and Installation

- Household treatments increased by approximately 25% over 2023
- Furnace repair/replacement installations increased by 200%
- RHA increased the capacity for appliance deliveries, increasing refrigerator installations by approximately 50% over 2023 activity.

Communication and Coordination

- The ESA Main Program maintained open communication with its implementer and HVAC contractors via more than thirty collaborative meetings. These meetings focused on proper documentation handling, addressing customer complaints, reviewing inspection results, and enforcing corrective action plans.
- ESA WG completed six statewide public meetings throughout 2024, capturing the interest of more than 400 total attendees including ESA WG IOUs, non-IOU member organizations and the public.

Customer Satisfaction Surveys

The ESA Main Program monitors customer satisfaction, including feedback or issues in program delivery, through two surveys: SDG&E overall program survey conducted by Market Decision Corporation (MDC) Research and a weatherization program survey managed by the program implementer, RHA.

MDC Research

- MDC's survey is designed to pinpoint deviations from historical trends, and assess differences based on customer types and demographics. The results are reported

biannually and are used to boost customer satisfaction by generating new marketing insights.

- In 2024, the survey underwent a complete overhaul to address program changes and increase the specificity of questions related to program steps respondents may be familiar with.
- Results from the second half of 2024 showed growth in these areas:
 - Overall Perception:
 - 89% rated the program positively in the second half of the year, up from 82% in the first half.
 - Quality of Services:
 - 75% rated service quality positively in the second half of the year, up from 59% in the first half.
 - Quality of Measures Installed:
 - 89% rated installed items positively in the second half of the year, up from 85% in the first half.

RHA Weatherization Survey

- RHA conducted customer surveys to assess the performance of its weatherization contractors.
- The overall average score for the quality assurance of contractors was positive at 92%.

ESA Southern MFWB 2024 SDG&E Summary

ESA Table 1.1.1.2 below shows the total 2024 expenditure, treatment and savings activity for SDG&E's portion of the Southern MFWB Program.

**ESA Table 1.1.1.2
2024 ESA Southern MFWB Program Summary by IOU**

SDG&E	2024 Authorized Budget/ Forecasted Planning Assumptions^[a]	2024 Actual	%
Budget ^[b]	\$9,491,464	\$3,326,685	35%
Administrative Budget ^[c]	\$1,378,785	\$595,537	43%
Multifamily CAM Properties Treated ^[d]	54	3	6%
Multifamily Tenant Units w/in Properties Treated	10,155	3,168	31%
kWh Saved	1,273,901	601,162	47%
kW Saved	N/A	58	N/A
Therms Saved	73,198	26,362	36%
GHG Emissions Reduced (Tons)	N/A	445	N/A

[a] Pursuant to D.21-06-015, planning assumptions for savings goals and homes treated target are based on annual ESA MFWB Program allocation of the overall Program Cycle Goals as filed in AL 4115-E/3144-G.

[b] 2024 authorized budget includes \$9,014,088 for ESA MFWB and \$477,376 for ESA SPOC per D.21-06-015, Attachment 1, Table 11. MFWB Program budget and actuals include In-Unit, WB, SPOC, and Implementer administrative budget categories as shown on ESA Annual Report Table 1A-1 and Table 2A. In accordance with D.21-06-015, OP 181, MFWB funds not expended in previous program years will be available to the MFWB Program throughout the 2023-2026 program cycle. As of the end of program year 2023, \$5,626,078 in cumulative unspent committed funds remained available but were excluded from the budget above. Refer to ESA Table 11 for a breakdown of the unspent committed funds available to the current program cycle.

[c] SDG&E authorized administrative budget of \$901,409 per AL 4482-E/3324-G plus \$477,376 for SPOC per D.21-06-015, Attachment 1, Table 11. Actual "Administrative" costs include all 'below-the-line' activities, which differ from 'administrative costs' subject to the 10% cap. ESA Program expenses subject to the 10% administrative cap follow the same definition and categorization of 'administrative costs' as the energy efficiency programs, as authorized in Section 6.15.7.7 of D.21-06-015.

[d] See Table 2A – Totals are classified under Multifamily CAM/WB Treated.

In 2024, SDG&E in partnership with its implementer made significant strides in improving program design and implementing contract adjustments, resulting in a strong ramp-up in program performance during the second half of the year. Key accomplishments include:

Policy & Procedures

- Successfully filed and obtained approval for a Tier 2 Advice Letter to facilitate cost-sharing of SDG&E's administrative expenses with the Southern IOUs.
- Amended the primary contract in June to address contractor compensation concerns, ensuring a more sustainable financial model for subcontractors.
- Developed a comprehensive MFWB Policy & Procedure (P&P) and Installations Standards (IS) Manual, enhancing standardization and clarity of program execution.

- Maintained a robust project pipeline and strengthened engagement with Single Point of Contact (SPOC) stakeholders, contributing to higher participation and an efficient customer journey.
- Completed several Whole Building Projects and documented lessons learned to inform continuous program improvement.
- Established effective coordination and partnerships with IOUs, fostering collaborative efforts in program implementation.
- Achieved the highest number of property enrollments to-date and successfully completed multiple whole building projects and in-unit treatments by year-end.

Operational Efficiency & Process Streamlining

- RHA partially integrated its system to automate the uploading of supporting documentation to EECF.
- RHA launched internal and subcontractor-facing dashboards to provide real-time tracking of lead conversions, project statuses, and completion milestones, allowing for faster identification of stalled projects and bottlenecks.

Subcontractor Support

- Revised the program's compensation model in June through a contract amendment to include enrollment fees for in-unit projects and higher incentives for common area and whole building retrofits, making participation more financially viable for subcontractors.
- Streamlined its invoice submission and review processes to address cash flow issues by reducing payment timelines, providing more predictable and timely reimbursement to subcontractor teams.
- RHA onboarded new subcontractors in key service areas and re-engaged previously paused partners, expanding capacity across regions and stabilizing treatment volume in the second half of the year.

Property & Portfolio Engagement

- Created dedicated account manager roles specifically for portfolio clients, improving communication and coordination with owners of large multifamily portfolios and accelerating project onboarding timelines.
- Developed a Property Owner Agreement (POA) Concierge workflow to manage the collection and tracking of POAs, which had previously caused extensive delays in tenant enrollment and treatment initiation.
- Enhanced document pre-screening and intake processes, reducing redundancy and manual rework, and allowing more properties to move efficiently from initial contact to assessment and incentive development.

Communication & Customer Experience

- Introduced a streamlined digital signature override system and related documentation policies to minimize friction in tenants and property owner onboarding, especially for customers with limited digital access.
- Upgraded the program's dashboard used by IOUs, SPOCs, and RHA staff to provide dynamic tracking of lead status, document completion, and enrollment progress, improving transparency and inter-agency coordination.
- RHA expanded call center capabilities by training agents in common escalation protocols, translating key materials, and standardizing follow-up communications, leading to improved response times and tenant satisfaction.

Customer Satisfaction Surveys

The MFWB Program monitors the in-unit and common area measure customer satisfaction post treatment through a program survey managed by RHA. Based on 126 in-unit survey responses, results indicated:

- The average customer satisfaction score is 4.2 out of 5.0.
- Professionalism and clean installations rated above 90% for most contractors.
- Program explanation scores were more varied, ranging from 52% to 100%, highlighting a need for consistency.
- Recommendation likelihood is solid, with most contractors above 70% likely or extremely likely to be recommended.
- Results suggest consistently high service quality, with room to strengthen program communication and engagement.

By the end of 2024, SDG&E's MFWB Program showed moderate progress, with a number of projects in the pipeline and several completed. The program reported 295 total enrollments, 261 assessments and finalized eleven Whole Building projects, covering 11,803 tenant units. Work on Common Area and Whole Building projects continued, with further developments anticipated in 2025.

ESA Southern MFWB 2024 IOU Summary

ESA Table 1.1.1.3 below shows the total 2024 authorized budget, expenditure, treatment and savings activity for Southern MFWB Program.

ESA Table 1.1.1.3 2024 ESA (Southern) MFWB Program Summary			
SDG&E, SCE & SoCalGas	2024 Authorized Budget/ Forecasted Planning Assumptions^[a]	2024 Actual	%
Budget ^[b]	\$42,144,132	\$12,436,816	30%
Administrative Budget ^[c]	\$4,777,623	\$1,536,968	32%
Multifamily CAM Properties Treated ^[d]	260	12	5%
Multifamily Tenant Units w/in Properties Treated	46,783	11,803	25%
kWh Saved	11,834,944	1,902,559	16%
kW Saved	N/A	300	N/A
Therms Saved	723,721	218,498	30%
GHG Emissions Reduced (Tons)	N/A	1,409	N/A

[a] Pursuant to D.21-06-015, planning assumptions for savings goals and homes treated target are based on annual ESA MFWB Program allocation of the overall Program Cycle Goals as filed in AL 4115-E/3144-G.

[b] MFWB Program budget includes In-Unit, WB, and Implementer administrative budget categories for all three southern IOUs as shown on SDG&E AL 4115-E/3144-G, Table 4 and 2024 Actuals as shown on ESA Annual Report Table 2A-1.

[c] The authorized administrative budget for SDG&E is established per AL 4482-E/3324-G, Table 1. Any additional administrative expenditures incurred by SCE and SoCalGas will be reported in their respective annual reports. Actual "Administrative" costs include all 'below-the-line' activities, which differ from 'administrative costs' subject to the 10% cap. ESA Program expenses subject to the 10% administrative cap follow the same definition and categorization of 'administrative costs' as the energy efficiency programs, as authorized in Section 6.15.7.7 of D.21-06-015.

[d] See Table 2A – Totals are classified under Multifamily CAM/WB Treated.

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.¹⁰ The Program Implementation costs were managed in compliance with the Decision and in accordance with a co-funding agreement amongst the Southern IOUs (SDG&E: 20%, SCE: 31% and SoCalGas: 49%).¹¹ ESA Table 1.1.1.3 above provides a summary outlining the three Southern IOUs' Program activities in 2024. Funds not expended during the current program year will be available for the MFWB Program throughout the remainder of the program cycle.¹²

¹⁰ Each IOU will report service territory activity in its respective annual report.

¹¹ D.21-06-015, at OP 151

¹² D. 21-06-015 at OP 181.

D.21-06-015 also directed the utilities to follow the statewide program protocol of accruing savings based on proportion of the overall budget contribution.¹³ However, this requirement conflicts with the SMFWB Program design filed in the SMFWB AL 4115-E/3144-G, which ensures that each utility's budgets and savings are focused toward serving customers within its own service territory, and current Energy Division reporting requirements included in Table 1.1.1.2 above and Excel Table 2A of the IOU reports. To comply with OP 152, the table below additionally presents each IOU's savings values as calculated under this statewide attribution model ordered.

ESA Table 1.1.1.4 Placeholder for OP152: MFWB Statewide Savings Calculation ^[a]			
IOU	kWh	Therms	%
SDG&E	380,512	43,700	20%
SCE	589,793	67,734	31%
SoCalGas	932,254	107,064	49%
Total	1,902,559	218,498	100%

[a] D.21-06-015 at OP152

The ESA Southern MFWB Program Pipeline below illustrates the program's pipeline activity from previous years and the quarterly activity for 2024 for the three Southern IOUs.

ESA Southern MFWB Program Common Area Measure Pipeline						
Multifamily CAM	2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Total
Leads	644	211	273	514	407	2,049
CAM Enrollments	69	74	78	71	72	364
CAM Assessments	38	71	79	55	61	304
CAM Project Completed	0	0	0	4	8	12

ESA Southern MFWB Program In-Unit Pipeline						
In-Unit	2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Total
Enrolled	6,479	6,306	6,769	9,756	4,827	34,137
Treated & Invoiced	0	1,232	1,437	3,292	5,842	11,803

¹³ Id. at OP 152.

ESA Pilot Plus/Pilot Deep Program Summary

ESA Table 1.1.1.4 below shows the total 2024 authorized budget, expenditure, treatment and savings activity for the ESA PPPD Program.

ESA Table 1.1.1.4 2024 ESA Pilot Plus and Pilot Deep Program Summary			
	2024 Authorized Budget / Forecasted Planning Assumptions^[a]	2024 Actual^[b]	%
Budget ^[c]	\$1,526,683	\$806,411	53%
Administrative Budget ^[d]	\$152,668	\$349,233	229%
Homes Treated ^[e]	30	2	7%
kWh Saved (Plus = 5-15 Percent)	N/A	332	-
kWh Saved (Deep = 15-50 Percent)	N/A	505	-
kW Demand Reduced	N/A	0.1496	-
Therms Saved (Plus = 5-15 Percent)	N/A	12	-
Therms Saved (Deep = 15-50 Percent)	N/A	16	-
GHG Emissions Reduced (Tons)	N/A	.465	-

[a] Home treatment, energy savings, and GHG emissions reduction targets are planning assumptions and not directed in D.21-06-015.

[b] Homes treated, savings and GHG emissions reduction values are reported when projects have been fully closed (i.e., inspected, issues resolved, permits closed, as applicable) and reported by Pilot Implementer to SDG&E. Energy savings are estimates provided by energy modeling software. SDG&E intends to report these estimates as interim savings until meter-based savings estimates are available.

[c] In accordance with D.21-06-015, OP 181, PPPD funds not expended in previous program years will be available to the PPPD Program throughout the 2022-2026 program cycle. As of the end of program year 2023, the cumulative unspent funds excluded above totaled \$2,824,865. Refer to ESA Table 11 for a breakdown of the unspent committed funds available to the current program cycle.

[d] Actual "Administrative" costs include all 'below-the-line' activities, which differ from 'administrative costs' subject to the 10% cap. ESA Program expenses subject to the 10% administrative cap follow the same definition and categorization of 'administrative costs' as the energy efficiency programs, as authorized in Section 6.15.7.7 of D.21-06-015. The PPPD program cycle 10% admin budget total is \$763,342.

[e] SDG&E's Pilot implementer revised the target of 50 homes in 2024 to 30 due to the slow start and efforts in obtaining relevant information from customers for enrollment.

Contract Execution and Program Ramp-Up

In 2024, SDG&E focused on the launch of the PPPD Program, fostering customer enrollment, improving lead quality, and achieving the first home installations. The year began

with a major milestone as SDG&E executed the contract for the PPPD with Maroma Energy Services on January 9, 2024. Immediately following contract execution, program ramp-up activities were initiated. These activities included initial system setup, the creation of marketing materials, the development of Key Performance Indicator (KPI) templates, and the establishment of a comprehensive reporting dashboard. By October, most foundational ramp-up activities were successfully completed, positioning the program for impactful implementation. Remaining activities, including the final configuration of the enrollment system supporting the Pilot, were completed in early 2025.

Pilot Administrative Cost

As reported in SDG&E's Low Income Annual Report for 2023 activity, SDG&E struggled to find a Pilot implementer and conducted multiple solicitations prior to requesting approval to sole source the Pilot implementation to a list of potential implementers through a Request for Quotation.¹⁴ This challenge caused SDG&E to incur significant administrative costs prior to any Pilot ramp up activities. The addition of multiple rounds of solicitations to normal program ramp up costs will likely cause Pilot general administration costs to exceed the 10% cap ordered in Attachment 2 of D.21-06-015. SDG&E is monitoring costs closely and will keep the Commission informed on the status of the Pilot administrative costs.

Lead Generation and Marketing Campaigns

Lead generation efforts began with the launch of the first email campaign in April 2024. Subcontractors assessed the leads generated to determine program eligibility. In October, SDG&E launched a second email campaign, specifically targeting Disadvantaged Communities (DACs) and Tribal areas. The combined campaigns targeted 3,500 customers, resulting in 484 leads and 66 enrollments. To ensure a seamless customer experience, subsequent campaigns were temporarily paused to focus on effective customer outreach and lead assessment.

¹⁴ SDG&E Advice Letter 4223-E/3196-G filed May 9, 2023 and approved by the Energy Division effective June 8, 2023.

Partnership with The Harris Group (THG)

The Harris Group conducts market research to enable customer feedback and provide insights into program offerings and delivery. In October, SDG&E finalized its contract and training with THG to enhance customer outreach and identify potential Pilot participants. THG conducted follow-up efforts from the October email campaign referenced above. Using a detailed questionnaire and a robust outreach strategy, which included up to three customer contact attempts, THG successfully identified 56 high-quality leads for Maroma to assess for enrollment.

Customer Enrollment Progress

By December 2024, 28 leads were under assessment, and four assessments were completed. During the ramp-up phase, SDG&E encountered several challenges, including the need to amend the contract and difficulties in collecting detailed customer information required for the enrollment and assessment—such as energy consumption data and income documentation. To help streamline the process, SDG&E amended the implementer contract to provide energy usage data directly to Maroma and focused outreach on customers who fall within low-income PRIZM codes and meet categorical eligibility criteria. Due to these necessary changes, and a longer than anticipated ramp up timeline, the program made limited progress, completing two installations by December 2024.

2024 Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Summary

ESA Table 1.1.1.5 below shows the total 2024 authorized budget, actual expenditures and percentage of spend for SASH & MASH.

ESA Table 1.1.1.5 2024 Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Unspent Funds (Electric IOUs Only)^[a]			
	2024 Authorized	2024 Actual	%
Budget	\$315,260	\$0	N/A

[a] OP 12 of D.15-01-027 states "The Program Administrators shall ensure that program expenditures in each utility's service territory do not exceed the total authorized budget amounts over the duration of the programs. The program incentive budgets will be available until all funds are exhausted or until December 31, 2021, whichever occurs first. Any money unspent and unencumbered on January 1, 2022, shall be used for "cost-effective energy efficiency measures in low-income residential housing that benefit ratepayers," as set forth in Public Utilities Code Section 2852(c)(3)."

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

As of 2022, SDG&E has not transferred any unspent SASH and MASH Unspent Funds to the ESA Program. A joint utility advice letter reflecting the transfer of unspent funds to the IOUs was submitted October 31, 2023. In 2024, these funds were not allocated to any contract. SDG&E intends to utilize the available SASH/MASH unspent funds by the end of the program cycle.

1.2 Marketing, Education, and Outreach (ME&O)

1.2.1 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/CBO).

Customer Research and Segmentation

In 2024, the ESA Main Program continued leveraging customer research and targeted segmentation to enhance its outreach efforts and program enrollment strategies. By categorizing residential populations based on energy-related attitudes, behaviors, and demographics, SDG&E effectively identified key customer segments for targeted engagement. The segmentation model incorporated factors such as energy conservation behaviors, media consumption habits, lifestyle

preferences, mobile usage, and engagement propensity, allowing for a refined approach in addressing customer needs and barriers to participation.

Utilizing insights from the most current Athens Research Study and SDG&E's Residential Segmentation Model, SDG&E modernized its customer segmentation framework to align with market changes and dynamic customer behaviors. This data-driven approach enabled the deployment of targeted messaging to customers most likely to qualify for the ESA Main Program. Through a strategic combination of communication tactics—including direct mail and outbound calling—SDG&E engaged potentially eligible customers, increasing awareness and program participation.

Targeted Marketing and Outreach Efforts

A prime example of SDG&E's integrated outreach strategy was the 2024 ESA Main Program targeted marketing campaign. Over 61,000 emails were sent to currently enrolled and potentially eligible CARE and FERA customers, encouraging them to apply for the ESA Program where applicable.

To further streamline the customer engagement process, SDG&E implemented an online interest form and home energy audit/survey, allowing households to identify their specific energy needs prior to ESA Main Program enrollment. This tool facilitated a more efficient customer journey, instantly transmitting information to outreach contractors. More than 14,000 customers interacted with the online interest form, leading to over 1,200 responses, 353 online submissions, and 124 treated homes.

Community Partnerships and Outreach

SDG&E sustained its collaboration with the Energy Solutions Partner Network, consisting of over 200 Community-Based Organizations (CBOs). These organizations played a pivotal role in educating and enrolling customers in low-income programs through various channels, including email campaigns, social media messaging, website postings, event participation, and hosting enrollment fairs. In 2024, the network leveraged both traditional and

digital communication platforms such as Facebook, X, Instagram, and Nextdoor to amplify program messaging and increase customer engagement.

Additionally, SDG&E identified CBOs beyond its existing network to enhance outreach within underserved and hard-to-reach communities. This initiative focused on rural, multicultural, multilingual, and Access and Functional Needs (AFN) populations, ensuring equitable program access. Coordinating with CBOs, SDG&E promoted the CARE, FERA, and ESA Programs through presentations, events, training sessions, and tailored messaging, fostering trust and increasing enrollment opportunities.

In 2024, SDG&E and its partners conducted over 700 presentations and events across its service territory. Recognizing the importance of linguistic accessibility, bilingual representatives were engaged to communicate with non-English-speaking customers, further strengthening outreach effectiveness. The ability of CBOs to serve these harder-to-reach segments remained a critical factor in driving program enrollments.

MFWB Strategic Marketing Campaigns and Lead Generation

RHA spearheaded a targeted marketing campaign aimed at engaging MFWB customers based on specific demographic, financial, geographic, and health-related factors. This initiative, executed in collaboration with program subcontractors and trade allies, involved participation in multifamily tradeshow to generate leads and program enrollments. Additionally, RHA and SDG&E coordinated marketing efforts with support from Southern IOU SPOCs at SDG&E, SoCalGas, and SCE. These SPOCs played a crucial role in prospecting and delivering leads, contributing 14% of the total 791 leads within the program's pipeline.

Further enhancing its multifamily outreach, SDG&E's SPOC worked with Residential Intelligence (Res-Intel) to refresh the multifamily market study originally conducted in 2020. This updated market analysis enabled the design and execution of more precise marketing campaigns, outreach strategies, and program leveraging opportunities tailored to multifamily customer segments. The study concluded in March 2025. Additional details on this initiative are outlined in Section 1.12.2 of the report.

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

SDG&E's PPPD launched in the first quarter of 2024. To achieve the savings as directed in D.21-06-015,¹⁵ the customers targeted for participation in the Pilot are single family, mobile home low income, high usage customers, defined as customers enrolled in CARE or FERA who have either exceeded 300% of their electric baseline usage and/or, 200% of their gas baseline usage on three or more occasions within the past 12 months. In addition, the targeted customers for this Pilot are in climate zones 10, 14, and 15. These climate zones are part of SDG&E's inland, mountain, and desert areas, which experience greater temperature swings. More than 70% of homes in these climate zones are 30 years or older and they are typically less efficient, increasing the potential for deeper energy savings.

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 2024, SDG&E continued to utilize Residential Segmentation data overlaid with the Athens Research Study for the ESA Main 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 Groups and Social Groups. Layering on top of the Residential Segmentation data, SDG&E worked closely with RHA to develop criteria for the ideal customer to target customers with the highest potential for savings, which informed targeted communications in 2024. In addition to mass market awareness tactics such as TV and bill inserts, SDG&E continued ESA-specific tactics in 2024, which focused on communicating ESA benefits to eligible customers. The campaign ran in English, Spanish, and Vietnamese and included TV (PSA-style interviews),

¹⁵ D.21-06-015 at Attachment 2.

digital (including paid search), out-of-home and email. See Appendix B 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.

ESA Main Program

As previously described, SDG&E executed targeted outreach and engagement efforts aimed at customers that have been identified as likely to meet income qualifications and have high energy savings potential. In 2024, SDG&E made significant progress on its Home Energy Savings Kit campaign, mailing over 10,000 kits consisting of do-it-yourself energy and water saving items¹⁶ to target customers. The Kits included a call-to-action directing customers to contact RHA to take advantage of the ESA Main Program.

SDG&E, in collaboration with RHA, continued efforts to streamline Enrollment and Assessment by deploying a new online enrollment process. This new online feature enables customers to easily complete eligibility screening and submit supporting documents virtually. The shift helped the program address challenges caused by a reduced number of residential outreach specialists available for door-to-door canvassing. To support this transition, the program redirected marketing efforts to promote the online enrollment experience, encouraging customer engagement and participation. This virtual pathway proved essential in maintaining a steady flow of participants and supporting the continued achievement of program goals. In 2024, the online enrollment form received 1,200 responses, with 353 online submissions, resulting in 124 completed enrollments.

Also new in 2024, in an effort to increase the number of rental homes treated and improve program savings, RHA assigned additional staff dedicated to the collection of Property Owner Authorization (POA)s and provided employees financial incentives for submitting completed POAs.

¹⁶ The kits include lightbulbs (3), faucet aerators (2), low flow shower head, and a toilet bank. These items are considered promotional and do not contribute to ESA energy savings goals.

In 2024, SDG&E proposed the following measure modifications: retire High Efficiency Gas Clothes Dryers and add Smart Fan Controller, Lifecycle Refrigerant Management, Brushless Fan Motor Replacement, and Energy Efficient Freezer. These proposed modifications passed through the ESA Policies and Procedures & Installation Standards (PP/IS) Manual Sub Working Group and ESA Working Group and SDG&E initiated planning and development to deploy the new measures.

Southern MFWB Program

The Southern MFWB Program leads, marketing, and outreach are managed through a collaboration between the IOUs' SPOC and RHA, the program's implementer. RHA conducted webinars, attended industry events, engaged on-site during installations, distributed multilingual materials, collaborated on digital marketing with utility partners, and integrated call center support to promote the program to property managers, stakeholders, and residents. Additionally, staff provided flyers, answered questions, and supported enrollment directly with residents. The program primarily targeted whole building enrollments, covering both common areas and individual units. Additionally, it integrated with the Southern IOUs' in-house SPOC and utilized leads from the Multifamily Central Portal (MCP) to create a 'true one-stop model,' enhancing the use of all available programs and services, including benchmarking and financial services. While RHA oversees marketing and outreach efforts, the IOUs and their SPOCs play a crucial role by providing leads to the program, accounting for 50% of the leads in the program's pipeline.

The Southern MFWB Program continued to refine its processes based on lessons learned. RHA rebuilt its account management team to include new staff with real estate and professional development experience to build the team's capabilities and better serve customers when enrolling and walking them through the customer journey. Additionally, they added staff dedicated to promoting and working with large portfolio owners to enroll their properties into the program. RHA transitioned all its subcontractors to Fast Field, tablet-based enrollments, providing the customer with digital experience throughout the enrollment, assessment and treatment process. Paper forms are only used when the internet is not available in the field. The

subcontractors utilizing Fast Field ensure all necessary information is gathered and submitted to RHA prior to invoicing, reducing the risk of missing or incorrect data.

Inspections

Under the ESA Portfolio delivery model, the ESA Main 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.

2024 Winter Storms Outreach

As required by D.19-07-015, the Commission established a permanent set of minimum emergency disaster customer protection measures the IOUs are mandated to implement in the event of a declared emergency. To comply, customers impacted by the 2024 Winter Storms were reported to SDG&E for assistance. The ESA implementer was notified of the emergency protections protocol. A total of 3,252 customers were identified as being eligible for the ESA Main Program but not yet enrolled. SDG&E's ESA residential SPOC engaged with community organizations in seven community meetings to offer ESA Program services. Additionally, SDG&E deployed an email campaign to reach potentially impacted customers and partnered with The Harris Group to contact customers by telephone to offer ESA Program services. As a result of these combined efforts, 54 customers were enrolled in ESA.

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.

There are 17 Federally recognized tribes and 3 non-Federally recognized tribes within the SDG&E service territory, each with very different priorities and resources. In 2024, SDG&E's Outreach and Tribal Relations team worked together to engage with the tribes within its service area as part of its ongoing initiative to connect tribal members to available customer assistance programs and other available resources. SDG&E understands and appreciates the Tribal Nations served in its territory are federally recognized tribes and are distinct political entities, each

having its own laws and policies that SDG&E must adhere to when on their land. SDG&E also continues to prioritize low-income program outreach to hard-to-reach areas where tribal members reside. Additionally, SDG&E has established support systems with Indian Health Councils, Southern California American Indian Resource Center (SCAIR), and Southern California Tribal Chairmen's Association (SCTCA) to reach tribal community members in need.

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.¹⁷ There are currently no multi-family properties in these communities. SDG&E developed an annual survey to enhance our services and communication by understanding the changing political, economic and social landscapes. Formal feedback and constant evaluation are key in ensuring that we follow through on what we say and build trust with tribal members. Throughout the year SDG&E looks for opportunities to have focus groups and receive feedback to help lead with a shared vision and identify shared goals to create culturally appropriate messaging and a more equitable future for tribal members who are the original inhabitants of this region.

In 2024, 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 2024, SDG&E met with 13 tribes to discuss low-income programs and other customer programs and continues to offer the opportunity to the remaining four tribes. SDG&E continued to partner with tribal governments to identify existing meetings where SDG&E can reach vulnerable members to provide onsite AFN resources and enrollment to minimize the resource impact on tribal governments, lack of broadband and technology, and the lack of trust. Additionally, SDG&E continues to strengthen partnership with tribal law enforcement and fire departments to disseminate emergency bags and information because they are the trusted on-the-ground workforce that perform wellness checks in their communities. SDG&E did not meet with any of the three non-federally recognized tribes. There are ongoing challenges to engage non-federally

¹⁷ 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.

recognized tribes because they do not own a specific tract of land, nor have funding for dedicated tribal government staff to engage with SDG&E.

Seven of the 17 tribes that SDG&E serves have been identified as having potentially eligible tribal members for Customer Assistance programs and have been approached with a mini grant opportunity. In 2024, these seven tribes were offered the mini grant opportunity, and three tribes received payment. Due to challenges with engagement, SDG&E continues to reevaluate its outreach strategies to increase participation in the mini grant opportunity.

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

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

In alignment with the directives of Assembly Bill (AB) 793, which requires Investor-Owned Utilities (IOUs) to integrate energy management technologies into the ESA Program, significant progress was made in 2024 to enhance customer engagement and energy efficiency.

A key initiative involved strengthening contractor training to ensure Residential Outreach Specialists were well-equipped to educate customers on energy management tools, including the ESA Program Energy Education Booklet and the Power Savings Rewards Program. As part of this effort, specialists receive instruction on SDG&E's My Energy Center¹⁸ platform as part of standard training, enabling them to guide customers through the website during In-Home Education visits. This hands-on approach helped customers understand and utilize available programs and tools to better manage their energy consumption and further empower them to make informed energy choices. In support of these initiatives, SDG&E invested more than

¹⁸ In August 2024, My Account transitioned to My Energy Center.

\$335,000 in In-Home Energy Education costs in 2024, reinforcing its commitment to customer education and energy efficiency.¹⁹

1.2.7 Managing Energy Use

As mentioned above, during in-home visits for the ESA Programs, customers are guided through the registration process if not already enrolled in My Energy Center and are provided with educational resources to be utilized for energy management through the My Energy Center tool. ESA Program Residential Outreach Specialists review customers' bills to provide them with information on how to best manage their energy use as they perform the in-home assessment. For example, when a Residential Outreach Specialist examines the water heater, they will guide the customer on setting the appropriate water temperature of the water heater to help reduce costs, while ensuring safety. As part of the installation of a smart thermostat, ESA Residential Outreach Specialists educate customers on smart thermostat set points to ensure comfort while managing energy usage. In 2024, SDG&E spent more than \$233,000 installing smart thermostats in income qualified households.²⁰

1.2.8 Services to Reduce Energy Bill

As described above, ESA Programs customers are informed about their energy use and have the opportunity to explore conservation and energy savings tips by completing a no-cost online five-minute Home Energy Survey. These tools are available through SDG&E's My Energy Center portal. 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.

¹⁹ Includes ESA Main, MFWB, & PPPD.

²⁰ Includes ESA Main & MFWB.

1.3 Energy Savings Assistance Program Customer Enrollment

1.3.1 Report the number of customers or households treated, the IOU specific 2024 household treatment target, and the percentage of households treated. If the IOU was not able to reach the total household target, please explain.

For ESA Main, SDG&E's household treatment target for 2024 was 3,983. SDG&E achieved the target by treating a total of 6,406 single family homes and mobile homes, or 161% of the target.

For the Southern MFWB Program, SDG&E treated 3,168 in-units and completed 3 CAM projects, achieving 31% of its in-unit goal and 6% of its CAM treatment goal. This was due to the program still ramping up in 2024. Although the program faced several challenges in the first half of the year, these were successfully mitigated as outlined in Section 1.1 of this report. Significant growth was achieved in the second half of the year.

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

In 2024, SDG&E continued to utilize categorical eligibility and self-certification to streamline enrollment efforts for the ESA Programs. 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.

An additional strategy to streamline and enhance the enrollment process is an online customer interest form for the ESA Main Program. Launched in 2023, the form includes questions designed to inform program implementers regarding a home's energy savings potential.

1.3.3 If the IOU has failed to meet its annual energy savings goal, please provide an explanation of why the goal was not met. Explain the programmatic modifications that will be implemented in order to accomplish future annual 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.²¹ While the ESA portfolio of programs made remarkable strides in 2024, several challenges impeded the ability to meet the energy savings goals in 2024 including:

Recovery from Disruptions

- On October 31, 2024, Launch Consulting Group, SDG&E's vendor and host for the EECF system indicated to SDG&E by email that they became aware of unusual activity through a ransomware cyber-attack on their Datacenter that hosts the EECF system.²² As such, the EECF platform was shut down for 8 business days. Users regained access November 12, 2024, and the testing sites were restored November 21, 2024.
- Despite these challenges, invoicing and work order processing for all ESA Programs were fully restored by December with no residual impact on program operations.
- Contractor invoices affected by the disruption were processed with Net 0 payment terms.

Market Saturation

- ESA Main Program experienced a high level of market saturation with similar types of measures offered as in the previous cycle, necessitating the exploration of new and innovative solutions. In March 2024, the ESA Main Program submitted a proposal for measure modifications to the ESA Working Group. This proposal requested the addition of smart fan controllers, lifecycle refrigerant management, brushless fan motor replacements, energy-efficient freezers, and tankless water heaters.

²¹ D.21-06-015 at OPs 56 and 57.

²² As reported in the November 2024 Monthly Report on Low-Income Assistance programs.

Renter-Owner Incentives

- ESA Main Program encountered challenges in addressing the split-level incentive dynamic between renters and property owners, highlighting a need for tailored strategies to bridge this gap. To increase renter participation, RHA assigned additional staff dedicated to the collection of Property Owner Authorization (POA) in addition to providing employees incentives for submitting completed POA forms.

System and Operational Adjustments

- ESA Main Program faced difficulties in pivoting system configuration, operational procedures, and workforce aligning with the new savings-based program model. Additional quality assurance measures in place to mitigate going forward.
- A system issue in the MFWB platform resulted in the reversal of split allocations for measure expenditures between utilities on certain dual IOU treatments. Challenges related to RHA's Quality MFWB Assurance processes required additional coordination and troubleshooting. System reconciliation activities will ensure future system alignment.

Program Implementation Gaps

- MFWB subcontractor compensation and cash flow concerns remained a priority, necessitating contract amendments and ongoing financial management efforts.
- MFWB installations require significantly more time (12-18 months) than anticipated as compared to previous CAM installations.

Contractor Engagement

- Despite simplifying the ESA Main Program solicitation process to an RFQ format, the third attempt to solicit HVAC/Water Heater contractors was unsuccessful. This underscores the need and plan for improved engagement strategies with the HVAC/plumbing industry and assessment of the solicitation process.

1.4 Disability Enrollment Efforts

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

In 2024, SDG&E conducted outreach efforts with organizations serving individuals with a disability (listed below) or other AFN to improve engagement in the ESA Programs. Throughout the year, SDG&E partnered with these organizations at more than 475 events and presentations, reaching over 62,000 customers. These events and presentations were provided to customers, 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 Appendix D.

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 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 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 low vision)

San Diego Center for the Blind 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 throughout the year to multiple constituent groups of San Diego Center for the Blind.

Deaf Community Services

On a monthly basis, Deaf Community Services (DCS) shared marketing materials and PSPS 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 training sessions 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 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 training sessions with each organization's staff. These efforts led to 5.5% of SDG&E's ESA Program enrollments being identified as customers with disabilities in 2024.

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

Despite the outreach efforts noted above, people with disabilities represented 5.5% of SDG&E's enrollment goal in 2024 for the ESA Programs. 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 rely on customers to provide disability status or visual indicators, which are not always apparent. Throughout 2024, SDG&E continued to partner with local organizations serving customers with disabilities and other AFN. These organizations included 211 San Diego, Deaf Community Services, and others. SDG&E will continue to support these organizations in 2025 and beyond and seek out additional methods to expand outreach to others who serve the disabled communities in its service territory.

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.

In 2024, SDG&E continued to strengthen its partnerships with a network of approximately 200 community-based organizations (CBOs) to connect customers with vital programs and resources. These efforts focused on customer assistance, bill payment support, energy conservation, Public Safety Power Shutoffs, resiliency, and wildfire preparedness. Key partners included 211 San Diego, Community Resource Centers, Women, Infants and Children (WIC), and similar agencies. Through its collaboration with 211 San Diego, SDG&E facilitated the enrollment of eligible customers in the CARE or FERA programs while generating leads for the ESA Programs. As a result, approximately 2,600 leads were identified, leading to approximately 70 customer enrollments.

Additionally, SDG&E's MF SPOC continued to conduct targeted outreach to multifamily property owners and managers, particularly within nonprofit affordable housing organizations and community-based organizations that serve underserved communities.

Throughout the year, sustained relationship-building efforts from the MF SPOC led to 36 additional property referrals to the MFWB Program, 72 property referrals to SOMAH, 10 property referrals to the RZNET Program, one property referral to Power Your Drive Program, and one property referral to the On Bill Financing Program.

SDG&E also continued its partnership with the Disadvantaged Communities Single-family Affordable Solar Homes (DAC-SASH) Program Administrator, GRID Alternatives, to enhance program leveraging efforts. As part of this collaboration, SDG&E facilitated an annual data-sharing initiative, integrating ESA single family enrollments into the DAC-SASH Program for households exceeding 400% of baseline usage under the CARE Program high-usage process.

In 2024, SDG&E and TECH Clean California (TECH) met multiple times to discuss possible coordination and leveraging opportunities between TECH and SDG&E ESA Programs. TECH funds are available to support the installation of heat pump HVAC and water heaters technology across California. The best candidates for this technology are high heating/high cooling load, which are not as common in San Diego climate regions. As the ESA Pilot Plus/Pilot Deep Program enrolls and assesses households, the opportunity to leverage TECH funding for heat pump technology will be considered.

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 continues to leverage CARE and FERA to improve ESA Programs participation. Customers using the joint CARE/FERA application are leveraged to generate ESA Main and MFWB Program leads sent directly to the implementer. In support of California Emerging Technology Fund's (CETF) efforts to provide eligible Californians with affordable internet services, SDG&E continues to provide customers visiting SDG&E's assistance website with a link to the CETF website. The CETF website is also included in Cool Zone Program brochures, which have been distributed to over 100 Cool Zone sites. Additionally, the program flyer was shared with its network of CBOs and at booth events to help increase program awareness.

1.5.3 Please provide a status of the leveraging effort with Community Services and Development (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 discontinued contracting directly with local Low Income Home Energy Assistance Program (LIHEAP) agencies. However, in 2024, RHA subcontracted with both San Diego LIHEAP contractors, MAAC and Campesinos Unidos, to continue leveraging enrollment efforts. Although there were limited referrals in 2024, ongoing efforts continued to streamline the referral process from LIHEAP agencies to ESA.

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

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

In 2024, 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 Programs energy education. SDG&E and SDCWA will be exploring opportunities for expanded efforts in early 2025. 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 Programs, creating ESA Program leads when a customer applies for CARE/FERA. Contractors are assigned program leads for customer follow-up. Leads generated through the joint online

internet application resulted in approximately 1,280 customers enrolled. Customers enrolling in the ESA Programs, 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.

SDG&E remains committed to minimizing confusion for property owners and managers regarding program participation and eligibility requirements through the MF SPOC initiative. Originally authorized under Decision 16-11-022,²³ the MF SPOC was established as a one-stop resource for MF property owners and managers. In 2021, Decision 21-06-015 expanded its scope to include benchmarking and financial services, further enhancing its value to participants.²⁴

Throughout 2024, the MF SPOC continued to serve as a central hub, leveraging leads and coordinating efforts with programs such as SDG&E's Residential Zero Net Energy Transformation (RZNET) Program, reinforcing its role in promoting sustainable energy solutions. In 2024, the MF SPOC made 10 property referrals to the RZNET program. Additionally, it played a pivotal role in evaluating MF properties and offering On-Bill Financing (OBF) and Benchmarking services during customer interactions.

By integrating common area and in-unit enrollments across low-income and energy efficiency programs, the MF SPOC provided a seamless, whole-building approach for participants. This holistic strategy improved program accessibility ensured comprehensive energy solutions, and enhanced property owner and manager satisfaction. In instances where properties did not qualify for ESA Programs, the MF SPOC's expertise in program offerings and incentive structures allowed for tailored referrals to alternative resources as mentioned above.

²³ D.16-11-022 at OP 45.

²⁴ D.21-06-015 at OP 130.

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.

On August 7, 2024, the CPUC issued D.24-08-003, which approved San Diego Regional Energy Network (SDREN).²⁵ As SDREN was just getting off the ground at the end of 2024, SDREN and SDG&E did not begin coordination efforts regarding the ESA Program in this program year. SDG&E expects to coordinate with SDREN on ESA Programs in 2025 and beyond to ensure there is no duplication in program offerings. These coordination efforts will be memorialized in revisions to the existing Joint Cooperation Memorandum between SDG&E and SDREN. Additionally, the MF SPOC collaborated with local governments for ESA Main and the ESA MFWB Programs outreach at the City of Chula Vista Benchmarking & Beyond event and a City of Encinitas Green Building Ordinance Training.

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 maintains ongoing collaboration with the EE team through the SPOC model. This model streamlines customer access to EE programs, ensuring a simplified process and reducing program-related confusion. When a multifamily property is ineligible for the ESA MFWB Program, the SPOC can facilitate access to alternative options, including residential EE programs.

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 enhance ESA Program contractors' expertise in both energy efficiency and Demand Response (DR) offerings, ESA Program management provided implementers with updated DR program eligibility guidelines, enrollment procedures, and participation benefits. Additionally, the ESA Main and MFWB Programs integrated DR education into its in-home energy education

²⁵ D.24-08-003 at OP 1.

process, ensuring customers receive information about the Power Saver Rewards pilot including a flyer for their reference. The activities resulted in the installation of over 960 smart thermostats for a total of over \$233,000 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, 2023.²⁶ CSI Thermal closed to new applications on July 31, 2020 and 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 Ordering Paragraph (OP) 43 of Decision (D.) 21-06-015, the Investor-Owned Utilities (IOUs) hosted the third annual Clean Energy Workshop on November 14, 2024. The purpose of the workshop was to bring various Income Qualified and Clean Energy Program administrators together to align on customer eligibility, increase referrals and enrollments, and improve coordination efforts. To advance progress in these priority areas, the IOUs propose leveraging the ESA Working Group meetings to provide ongoing updates on relevant activities. Additionally, insights from the next Clean Energy Workshop are utilized to evaluate lessons learned, incorporate stakeholder recommendations, and implement targeted actions to address the identified priorities.

2024 Workshop Purpose and Objectives:

1. Creating connections and fostering opportunities for relationship development and networking across California's income-qualified and clean energy program administrator community.

²⁶ SDG&E AL 4285-E accepted and effective November 30, 2023, *available at* https://tariff.sdge.com/tm2/pdf/submittals/ELEC_4285-E.pdf.

2. Providing program administrators with information on initiatives and programs along with approaches for customer engagement and increasing participation, and program collaboration.
3. Discussing barriers, lessons learned and shared successes to building program partnerships and customer involvement.
4. Highlighting successful program coordination that could be modeled and/or expanded.

The 2024 workshop focused on:

- Journey to Net Zero Carbon Emissions
- Edison Future State of Electrification
- Customer Home Energy Readiness Program
- Hydrogen & Decarbonization
- Equity Electrification Programs
- Concurrent Application System

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

In 2024, SDG&E remained committed to supporting solar incentive programs and fostering collaboration with key stakeholders to enhance customer participation. As previously stated, the SASH and MASH Programs have concluded.

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 facilitate the sharing of customer data. Under this directive, electric utilities are required to provide GRID Alternatives with an annual dataset of customer profiles to support marketing and outreach efforts for the DAC-SASH Program. These profiles specifically include ESA Main Program participants residing in single family, owner-occupied homes within disadvantaged communities. In compliance with D.20-12-003, SDG&E provided 254 leads to GRID Alternatives in 2024.

To enhance program effectiveness, SDG&E and GRID Alternatives established recurring quarterly and ad hoc meetings to discuss process improvements and opportunities for increased collaboration. These efforts resulted in 36 leads for the ESA Programs.

Additionally, SDG&E collaborated with the Center for Sustainable Energy (CSE) to expand participation in ESA Programs. This initiative resulted in 19 leads received from CSE in 2024.

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, see ESA Table 13B - ESA Clean Energy Referral, Leveraging, and Coordination in Appendix A.

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.

SDG&E and RHA continue their collaborative efforts to enhance Workforce Education and Training (WE&T) initiatives, focusing on recruiting from local communities and expanding training programs. RHA actively promotes employment opportunities for low-income customers through education and outreach, working closely with partners such as the San Diego Workforce Partnership and Upskill California, a consortium of 28 community colleges.

SDG&E and RHA remain committed to hiring within the communities they serve by distributing informational materials and conducting outreach to unemployed individuals. Through its collaboration with Upskill California, RHA connects job seekers with subcontractors, bridging the gap between pre-employment training and actual workforce opportunities. Additionally, RHA promotes the Energize Careers Program among its subcontractors to further expand employment pathways.

As the ESA Program Implementer, RHA employs a proactive approach to workforce education and training by facilitating regular training sessions, including:

- **Quarterly and Monthly Meetings:** Ongoing workforce education through structured sessions.
- **Tailboards and Quality Assurance Ride-Along:** Ensuring compliance and skill enhancement in real-time work environments.
- **Subcontractor Portal:** Providing access to training and certification programs.

When workforce challenges arise, RHA and SDG&E collaborate with contractors to implement Corrective and Preventative Action (CAPA) Plans or Process Improvement Plans (PIP). These structured, timebound processes address identified concerns through investigation, planning, deployment, and tracking of corrective actions.

ESA Program Training Efforts

A range of training initiatives were implemented to strengthen program delivery and contractor performance. Key activities included technical training on proper installation techniques for thermostats, windows, and furnace inspections. All 25 active NGAT technicians completed a four-hour in-person refresher course covering updated standards, procedures, and effective customer communication. Additionally, five new NGAT technicians were certified after completing a two-day training and passing a final exam with a score of 90% or higher.

RHA expanded workforce capabilities through the launch of the San Diego LEARN Program, offering free energy efficiency and electrification courses. Onboarding and refresher training sessions were delivered to new and existing subcontractors, including instruction on the MFWB Program, internal database (RHAI), FastField mobile data collection tools, and ESA Main Program protocols. Tailboard safety training and quality control sessions further supported contractor readiness and performance.

MFWB Program Training Efforts

RHA, the MFWB implementer, developed a comprehensive training and performance management approach to support subcontractor development and ensure high-quality service delivery. Approximately 10 targeted training sessions were conducted, including technical certification for Natural Gas Appliance Testing (NGAT), Energy Specialist bootcamps, and refresher courses focused on installation standards and customer engagement protocols. Regular training on the MFWB Program and its systems was provided to ensure subcontractors remained

current with program requirements. Contractors were also trained on internal databases and operational workflows to promote efficiency. A performance scorecard system was launched to evaluate subcontractor performance across timeliness, quality, and compliance, enabling data-driven reviews and coaching. In support of equity and workforce development goals, tools and reporting procedures were developed to better track and assist workers from Disadvantaged Communities (DACs).

SDG&E has demonstrated a strong commitment to workforce education and training. By fostering employment opportunities, implementing structured training initiatives, and maintaining collaborative partnerships, these efforts continue to support the development of a skilled workforce while enhancing service quality within the communities served.

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.

In 2024, SDG&E and the ESA Programs implementer conducted comprehensive training programs to enhance workforce capabilities. Details of these training initiatives can be found above in Section 1.7.1. Additionally, SDG&E contractors leveraged various business development organizations to support recruitment and hiring efforts. Key partnerships included the San Diego Workforce Partnership, San Diego Health and Human Services, and San Diego Community College, which served as valuable resources for identifying qualified workforce candidates for the ESA Programs.

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.**

SDG&E contractually requires ESA Portfolio contractors to commit to providing career pathways to disadvantaged workers. These subcontractors develop and submit Workforce Outreach Plans that include specific tactics and metrics to track compliance and progress. As a result, 100 percent of incentive dollars spent on ESA Program contracts include commitments to providing career pathways to disadvantaged workers.

- **Number of Career & Workforce Readiness (CWR) participants who have been employed for 12 months after receiving the training. (Provide contractors early warning of need for this information).**

CWR is 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 2024, RHA, the ESA Main and Southern MFWB Implementer, met with PG&E to discuss CWR opportunities for ESA Program contractor employees.

In 2024, there were 204 total participants employed who completed the Career & Workforce Readiness Program.

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

For SDG&E's local WE&T Program, the percentage of total WE&T training program participants that meet the definition of disadvantaged worker is reported in Table T-9 BP Metrics of SDG&E's 2024 Energy Efficiency Annual Report, filed on June 30, 2025, 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.**

Low Income Needs Assessment (LINA) Study

The 2025 LINA Study utilizes various data collection and analysis methods, including surveys, interviews, and data analysis to gather insights into the needs of low-income residents. The study commenced on January 9, 2024, with an initial meeting between the study team and the consultant Evergreen Economics. Weekly meetings were held throughout the first quarter to discuss technical aspects of the study's scope of work, leading to the development of a draft research plan. The draft research plan was then presented in a public webinar on April 12th to solicit stakeholder feedback. A final version of the plan was then posted on April 30, 2024. In August 2024, Evergreen Economics shared a draft version of the market characterization. The market characterization informed the sampling plan for an upcoming customer survey. The

remainder of the year's tasks included developing the sampling plan, drafting the survey questions, and designing a postcard which would be sent to customers targeted for the survey. In December, the postcards were sent to a small group of customers to pretest the survey questions. Results of the pretest were used to refine the survey questions in anticipation of a full survey launch in January.

In 2025, the study will analyze the survey responses and conduct seven focus groups with customers. Four of the focus groups will be in English, one in Spanish, and 2 in other languages. Evergreen Economics will then present all the draft results in a written report and a public presentation with stakeholders. The project is expected to be finalized by December 2025.

Low Income Non-Energy Impacts Study

Evergreen Economics was selected to conduct the study. The primary objective of the NEI Study is to assess and quantify health, comfort, and safety impacts resulting from ESA program treatments. The project commenced with an initiation meeting on February 15, 2024 to discuss the work scope. Evergreen Economics provided the draft work plan on April 17, which was reviewed and discussed in May and June. The study team refined the sampling plan and survey questions, preparing for a public workshop in July. A public workshop on July 8 presented the draft work plan, after which the plan was finalized.

A customer survey was developed and tested with 40 customers in October. As a result of this test survey, the survey questions for the larger sample were refined. In December, the full survey was launched, inviting a sample of SDG&E CARE customers to participate online or via telephone, with the survey running through January 2025.

In 2025, Evergreen Economics will analyze the survey responses and provide a final report.

1.8.2 For studies that concluded in 2024 submit a Final Study Report describing: (1) overview of study; (2) budget spent vs. authorized budget; (3) final results of study; and (4) recommendations.

No studies were concluded in 2024.

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 did not conduct any ESA Program pilots beyond Pilot Plus/Deep covered in Section 1.1.

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 conduct any ESA Program pilots beyond Pilot Plus/Deep covered in Section 1.1.

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

The Working Groups consist of ESA SWG-Cost Effectiveness SWG, Policy and Procedures (P&P) and Installation Standards (IS) SWG, Universal Application SWG, Concurrent Application System (CAS) WG and the CARE/FERA Post-Enrollment Verification (PEV) SWG.

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

ESA WG

Decision (D).21-06-015 specified the requirement for the IOUs to establish an ESA WG with multiple sub-groups to address a diverse set of program operations and improvements; one of the guiding principles being to provide energy savings and hardship reduction to low-income households in line with IOU program goals. The ESA WG held its first kick-off meeting in January 2022 and since then, the group has been meeting at least every two months to address specific subjects and/or deliverables with rotating SWG discussions. The ESA WG functions were initially divided into the ESA Council and three Sub-Working Groups (SWGs): ESA Program Cost-Effectiveness (CE) SWG, ESA Program Policy & Procedures and Installation Standards Manuals (PP&IS) SWG, and Universal Application System (UAS) SWG D.22-12-029

added the California Alternate Rates for Energy/ Family Electric Rate Assistance Program (CARE/FERA) Post-Enrollment Verification (PEV) SWG to expand the SWGs from three to four for Program Year (PY) 2023.

The ESA WG operates with specific guiding principles that are outlined in the Charter and Governance documents, and once the planned SWG tasks are completed, the SWG members delegate the SWG charter back to ESA WG. Prior to 2024, two of the four SWGs were completed: the ESA Program CE SWG in 2023 and the UAS SWG in 2022.

CARE/FERA PEV SWG: This SWG was tasked with developing recommendations for improving the income verification procedures policies. This SWG was open to the public and supported by selected ESA WG Members. The CARE/FERA PEV SWG ended activity at the close of the 2023 PY and the IOUs presented their conclusive annual findings in the ESA WG June 2024 Public Meeting.

1.10.2 What were the accomplishments of each WG and SWG in the 2024 PY?

2024 ESA WG: In 2024, the ESA WG retained eleven non-IOU members, comprised of contractors and non-profit organizations as well as four IOU members and one Energy Division representative. In addition, the ESA WG completed six statewide public meetings throughout 2024, capturing the interest of more than 400 total attendees including ESA WG IOUs, non-IOUs member organizations and the public. In addition to delivering annual and monthly reports as outlined in the decision, the ESA WG collaborated on and discussed several additional items, including but not limited to: contractor advanced payments, new measure implementations (including smart fan control, lifetime refrigerant maintenance and more), health, comfort, & safety (HCS) adjustments to support increased installation measures, program design changes to increase enrollments, and building electrification education and opportunities.

2024 PP&IS SWG: The PP&IS SWG continued executing its core function throughout 2024 including revisions and updates to the manual, updates to PP&IS measure specifications to include polices and installation standards and modifications, and revisions to the charter. The SWG met bi-monthly and provided updates and/or presentations in five out of six ESA WG public meetings. 2024 accomplishments for this SWG include but are not limited to the

following: Updated the PP&IS Manual to include electrification standards and policies, inspection policies and overall updates to income eligibility; finalized and implemented changes to Basic and Basic Plus Programs for customers living in climate zones 13-15 to receive additional savings; completed revisions to the P&P Manual and IS Manuals and conducted an initial assessment of "healthy building materials."

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

In 2024, the ESA WG held a total of six public meetings, 12 ESA WG Council meetings, and one closed meeting in December with only WG Members and Council. Throughout the six Public Meetings, the ESA WG presented a combination of annual and monthly reports as outlined in the decision as well as additional meeting topics as suggested by stakeholders. As a result of the discussion held in the ESA WG Public Meetings, two additional public workshops were held to help further achieve the objectives outlined in the Decision and Charter. These workshops included the Clean Energy Workshop and Concurrent Application System (CAS) Phase II Workshop.

Some of the opportunities for growth that came out of the 2024 PY included balancing HCS and Energy Savings Measures, Multi-Family Property Definition, Customer Journey Barriers, and meeting savings requirements for the Pilot Plus/Pilot Deep.

The WG has discussed and set goals for the 2025 PY including a list of priority topics and objectives to address the challenges faced in 2024.

The IOUs presented their 2023 annual reports during the virtual June ESA WG Public Meeting on June 27, 2024.²⁷ The IOUs presented 2023 ESA, CARE, FERA Program statistics, enrollment findings, general activities, outcomes and lessons learned. Among these topics, a variety of other IOU-specific updates were provided, including but not limited to marketing and outreach as well as customer engagement. The public meeting format provided an opportunity for a robust discussion and Q&A with stakeholders.

²⁷ The Annual Report Public meeting materials are publicly available on CPUC Energy Division's Public Document Area at <https://pda.energydataweb.com/#!/documents/3995/view>.

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.

In previous annual reports, SDG&E provided the analysis required in this section using a dataset from a multifamily property characterization study completed in 2020.²⁸ The dataset from the study included multifamily properties in the SDG&E service area regardless of the number of units. SDG&E then identified a subset of these properties that were estimated to have a high proportion of low-income tenants using a proxy code from SDG&E's customer data matched to each premise.

SDG&E completed an updated study of the multifamily properties in its service area using the same vendor.²⁹ For this PY2024 annual report analysis, SDG&E used this updated dataset. The updated dataset excludes properties with less than five units and flags properties estimated to be predominantly low income using various third-party data. The resulting set of low-income properties is considerably smaller than that shown in previous annual reports for these reasons. The following information is presented using the updated dataset.

SDG&E Low-Income Multifamily Property Characteristics

Type	Estimated No. of Properties	Conditioned Area Square Footage		2024 Consumption		Number of Properties Treated by ESA in 2024
		Total (millions)	Average (thousands)	Total Annual MWH	Total Annual Therms	
Deed Restricted	294	16.9	57.4	97,117	4,559,198	0
Market Rate	220	13.4	60.9	49,686	1,828,327	6

²⁸ Residential Energy and Water Intelligence (Res-Intel), SDG&E Multifamily Market Characterization, December 2020.

²⁹ Residential Energy and Water Intelligence (Res-Intel), SDG&E Multifamily Market Characterization, April 2025.

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

In 2024, SDG&E continued to work on refreshing the data from the 2020 Multifamily Market Characterization study from Res-Intel. While the aim was to conclude this study in 2024, the study took longer than anticipated and concluded in March 2025.

The 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 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 an NMEC analysis on 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. Due to the fact NMEC projects require at least 12 months of post-installation data, the analysis provided below is for properties treated in 2023.

Seventeen multi-family properties were treated with common area measures from January 2023 through December 2023. Installed measures include lighting, central boilers, heat pumps, programmable thermostats, a pool pump and faucet aerators. As shown in the table below, ex ante savings reported for these installations were 203,993 kWh and 21,070 therms. Ninety-six percent of the electric ex ante savings resulted from the lighting upgrades, and central boilers at four sites were the primary source of therms savings. Some of the therms savings were offset by negative therms from lighting interactive effects.

PY2023 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	4	-	-	21,618	103%
Heat pump split system	2	533	<1%	-	-
Lighting	16	195,355	96%	-561	-3%
Faucet aerators	2	2	<1%	12	<1%
Programmable thermostats	2	3	-	1	-
Pool pump	1	8,100	4%	-	<1%
Total	17	203,993	100%	21,070	100%

Evergreen Economics was contracted to perform a site level NMEC analysis on each of the properties. Aggregated results are presented in the tables below. Overall, the normalized annual kWh savings for all treated sites was 208,260 kWh and the normalized annual therms savings was 8,218 therms. Normalized annual energy savings is an estimate of the annual energy savings resulting from the measures installed during a year of “typical” weather conditions.³⁰

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

³⁰ For “typical” weather, Evergreen Economics used CZ2018 weather data files which provide historical weather patterns observed during the period 1998 through 2017.

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,³¹ hours of daylight, season, and day type (weekdays versus weekends). Model results were assessed for goodness of fit using multiple statistical metrics.

After this initial data assessment, eleven electric sites and two gas sites still exhibited changes in consumption patterns that could not be explained by program interventions. Evergreen adjusted these “non-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. Results were then analyzed by subgroups to assess patterns in realization rates (the proportion of ex ante savings that were realized). Five sites have solar, for which 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 102% realization rate.

Normalized Annual Savings for Electric Sites

Group	Subgroup	No. Sites	Ex Ante Savings (kWh)	Normalized Annual Savings (kWh)	Realization Rate
All	All sites	17	203,993	208,260	102%
Model Fit	High Quality	11	178,480	175,070	98%
	Low Quality	7	42,829	162,161	379%
Positive or Negative ex post Savings	Positive	12	115,857	231,255	200%
	Negative	2	36,815	(23,207)	-63%
Non-Routine Events	No NREs	6	82,774	94,437	114%
	Has NREs	11	121,219	113,823	94%
Solar	Net Metered	5	99,988	120,590	121%

³¹ Heating and cooling degree days were calculated using a base temperature of 65 degrees Fahrenheit.

The table below shows the subgroup results for the gas sites. As shown, the overall realization rate was 38%.

Normalized Annual Savings for Gas Sites

Group	Subgroup	No. Sites	Ex Ante Savings (Therms)	Normalized Annual Savings (Therms)	Realization Rate
All	Sites with Gas Savings	3	21,447	8,218	38%
Model Fit	High Quality	3	21,447	8,218	38%
	Low Quality	0	-	-	-
Positive or Negative ex post Savings	Positive	2	16,897	5,085	30%
	Negative	0	-	-	-
Non-Routine Events	No NREs	1	2,367	1,527	64%
	Has NREs	2	19,080	6,692	35%

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 2024 Results

In 2024, SDG&E's estimated eligible population for CARE enrollment was 289,930 customers. SDG&E ended the year with 305,902 customers enrolled in CARE, resulting in an enrollment rate of 106% of the total eligible population within its service territory, exceeding the program year goal of 90% enrollment. The increase in 2024 total new CARE enrollments 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, multicultural marketing, and live outbound call campaigns. Additionally, in 2024, SDG&E implemented the following program improvements and initiatives:

- Outbound Call Campaign with The Harris Group, proving to be the most successful tactic for gaining new enrollments in CARE.
- Annual CARE customer satisfaction survey reaching 400 customers, which revealed that most participants remain satisfied with the CARE Program (88%).
- New recertification cycle for Expanded CARE customers, which has changed from two to four years.

In September 2024, Assembly Bill (AB) 2672 was approved, requiring that the CARE Program include public housing authority owned or administered Homekey facilities where the residents of the facility substantially meet the CARE Program's income eligibility requirements and the account is in the name of Homekey, a nonprofit funded by Homekey, or the public housing authority that owns or administers the facility.³² SDG&E implemented the requirements of AB 2672 by June 1, 2025 based on guidance received by the Commission.

Procedural Background

The CARE Program is statutorily mandated by California Public Utilities (P.U.) Code Sections 739.1 and 739.2 to assist income-eligible households with a monthly discount on their

³² P.U. Code Section 739.1(i) as amended by AB 2672.

gas and electric bills.³³ The CARE Program currently provides a 20% discount on natural gas charges and a 35% discount on electric rates³⁴ to low income households with income below 200 percent of Federal Poverty Guidelines (FPG). Pursuant to D.24-05-028, SDG&E increased the CARE line-item electric discount to 35%, effective January 1, 2025, the current rate exemptions continue to apply, therefore SDG&E estimates the total effective CARE electric discount increased to approximately 38%.³⁵

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 all IOUs 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.³⁶

³³ The CARE Program was later implemented by the Commission in D.89-07-062 and D.89-09-044.

³⁴ D.24-05-028, at Conclusion of Law (COL) 11, at 147-148 and Ordering Paragraph (OP) 4, at 163. SDG&E Advice Letter 4588-E-A Partial Supplement available at <https://tariffsprd.sdge.com/view/filing/?utilId=SDGE&bookId=ELEC&flngKey=7472&flngId=4588-E-A&flngStatusCd=Approved>.

³⁵ *Id.*

³⁶ 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 2024 Residential CARE Program ^[a]						
Electric Customers by Month				Gas Customers by Month ^[b]		
PY 2024	CARE Customers	Percentage Change		PY 2024	CARE Customers	Percentage Change
Jan	337,096	0.1%		Jan	197,276	(0.1%)
Feb	335,915	(0.4%)		Feb	196,144	(0.6%)
Mar	335,312	(0.2%)		Mar	195,808	(0.2%)
Apr	333,058	(0.7%)		Apr	194,100	(0.9%)
May	328,637	(1.3%)		May	191,271	(1.5%)
Jun	324,149	(1.4%)		Jun	188,311	(1.5%)
Jul	318,426	(1.8%)		Jul	184,804	(1.9%)
Aug	317,244	(0.4%)		Aug	183,977	(0.4%)
Sep	316,729	(0.2%)		Sep	183,484	(0.3%)
Oct	312,864	(1.2%)		Oct	181,224	(1.2%)
Nov	309,414	(1.1%)		Nov	179,104	(1.2%)
Dec	305,902	(1.1%)		Dec	177,074	(1.1%)

[a] 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.

[b] Gas Customers by Month is a subset of the Electric Customers by Month.

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 by energy source in 2024.³⁷ This methodology entails annual estimation of eligibility for CARE, ESA, FERA, and other income-by-household size

³⁷ 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 (April 15, 2024).

parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state.³⁸

Sources for the 2024 eligibility estimates include the January 2024 Health and Human Services (HHS) Federal Poverty Guidelines (FPG)³⁹ (“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 American Community Survey (ACS) Five Year Summary Block Group Data (2019-2023), five years of American Community Survey Public Use Microdata Survey (ACS PUMS: years 2018-2023, skipping Covid-impacted 2020 data), a utility individually, sub-meter and master metered household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources.

The method takes into consideration ACS 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.

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) to obtain 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 to estimate the CARE enrollment rate.

³⁸ Athens Research performs the analysis using the joint utility methodology to provide the estimates for the California IOUs.

³⁹ See Federal Register / Vol. 89, No. 11 / January 17, 2024 / Notices, p. 2962.

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 2024.

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 in 2.1.1. 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 enrollment 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	22.5%
Gas	21.6%

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

Electric	10,816
Gas	7,912

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

Electric	4,909
Gas	3,827

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

Electric	45%
Gas	48%

2.1.7 Discuss any problems encountered administering the CARE Program for sub-metered tenants and/or master-meter customers during the reporting period and how they were addressed to resolve them.

As reported in its 2024 FERA Annual Report, SDG&E identified an issue regarding the administration of rate discounts to certain sub-metered tenants.⁴⁰ SDG&E discovered discrepancies between the number of sub-metered tenants participating in the CARE, FERA, or Medical Baseline (MBL) Program and the discounts reflected on the master meter bill. SDG&E has now determined that approximately 460 master metered properties had an incorrect number of discounts allocated between CARE, FERA, or MBL in the billing system. SDG&E has updated its billing system to correct the impacted master meter properties so that the appropriate program discounts are applied to the bills for these master metered properties on a go-forward basis. SDG&E is assessing the impact and will continue to keep the Commission apprised of its findings and proposed resolution.

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 2024, SDG&E sent approximately 300 direct mail packages to mobile home park owners and managers. Each package contained a letter with instructions to display the enclosed flyer in a common area, along with 10 application forms.

⁴⁰ Annual Report Activity of San Diego Gas & Electric Company on Family Electric Rate Assistance Program for 2024, March 3, 2025, at 26.

2.2 CARE Program Summary

2.2.1 Please provide CARE Program summary costs.

CARE Table 2.2.1 CARE Program Summary Costs			
CARE Budget Categories	2024 Authorized Budget	2024 Actual Expenses	% of Budget Spent
Outreach	\$2,521,978	\$2,521,978	100%
Processing, Certification and Recertification	\$1,784,839	\$1,784,839	100%
Post Enrollment Verification	\$493,699	\$123,519	25%
Information Tech./Programming	\$831,921	\$404,011	49%
CHANGES	\$265,000	\$265,000	100%
Studies and Pilots	\$19,535	\$14,015	72%
Measurement and Evaluation	\$0	\$0	0%
Regulatory Compliance	\$327,798	\$249,476	76%
General Administration	\$694,575	\$446,059	64%
CPUC Energy Division Staff	\$74,023	\$3,305	4%
Total Expenses	\$7,013,368	\$5,812,203	83%
Discounts and Benefits	\$124,031,180	\$212,441,434	171%
Total Program Costs and Discounts	\$131,044,548	\$218,253,637	167%

2.2.2 Please provide the CARE Program enrollment rate to date.

Participants Enrolled	Eligible Participants	Enrollment Rate	Target Met?
305,902	289,930	106%	Y

2.2.3 Discuss any issues or challenges to maintain enrollment goals, including enrollment, recertification, and post-enrollment verification, how those issues or challenges were addressed, and why goals were not met (if applicable).

SDG&E did not experience any issues maintaining enrollment, recertification, and post enrollment verification goals.

2.2.4 Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE recertification efforts, the nature of the complaints.

In 2024, the SDG&E call center received a total of seven recertification complaints.

In February 2024, SDG&E received one customer complaint regarding CARE recertification. The customer called in when they received a Spanish version of the recertification letter in the mail instead of English. The call center resent an English version of the letter to the customer and updated the customer's language preference to English.

During July 2024, SDG&E received one customer complaint regarding CARE recertification. The customer claimed they had recertified in June 2024, but SDG&E had no record of their renewal application and as such, the customer was removed due to non-response. The customer recertified and requested a re-bill for the time they did not receive the CARE discount. The customer was notified that they would be receiving a one-time credit of \$100 applied to their account.

In August 2024, SDG&E received one customer complaint regarding CARE recertification. A customer contacted the call center and asserted they had recertified in May 2024 for CARE. However, the customer had been removed from CARE in April 2024 due to non-response to recertification notices. The customer was re-enrolled at the time of the call and the customer's bill was adjusted accordingly.

In September 2024, SDG&E received four customer complaints regarding CARE recertification:

- A customer was removed from CARE in June 2023 for non-response to recertification letters. The customer claimed notices were not received due to issues with their mail service. SDG&E verified that two notices were mailed 120 and 60 days in advance of the end date. Despite recertification notices being sent, the customer was re-enrolled in CARE at the time of the call.
- A customer was removed from CARE in July 2024 for non-response to recertification letters. The customer claimed they had mailed in documents, but SDG&E verified no customer correspondence was received. Regardless, the customer was re-enrolled in CARE at the time of the call.

- A customer was removed from CARE in July 2024 for non-response to recertification letters. The customer stated they had filled out a CARE recertification form and mailed it in. SDG&E verified no documents from the customer had been received. Regardless, the customer was re-enrolled in CARE at the time of the call.
- A customer was removed from CARE in July 2024 for non-response due to multiple incomplete recertification notices. The customer called to inquire about the status of the CARE discount. The SDG&E call center explained that the customer’s recertification documents were incomplete. Regardless, the customer was re-enrolled in CARE at the time of the call.

2.3 CARE Program Costs

2.3.1 Discount Cost

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

Average Monthly Electric Discount	\$48.71
Average Monthly Gas Discount	\$8.59

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

Electric Subsidy	\$192,309,684
Gas Subsidy	\$20,131,750

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 bill inserts, brochures and flyers;
- Printing and mailing CARE applications and correspondence, including postage;
- Marketing and outreach staff labor;
- CBO partnership fees;
- Capitation fees; and
- Creative and media agency 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;
- 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, updating CARE documents, system reports, 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 pilots for the CARE Program.

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 advice letter filings, audits, regulatory reports, filing comments, responding to data requests, 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 CARE.

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

Electric CARE Overcollection	(\$25,481,163)
Gas CARE Undercollection	\$1,336,561

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 A 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 2024, SDG&E's CARE marketing campaign sought to connect with low-income customers across a diverse population. 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 C 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 2024 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 2024, 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 African American, Asian, Hispanic and rural (backcountry) publications, garnering 1,316,090 impressions (the number of times a user saw an SDG&E ad). 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 C of this report.

General Market & Streaming TV

In 2024, 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 18 million impressions. SDG&E also ran campaigns on Spanish-language stations, including Univision, Telemundo and Televisa. Streaming TV ran across multiple platforms and apps for both the general market and Spanish-language markets. Streaming TV is very flexible and allows SDG&E to target customer segments more deeply and optimize performance throughout the campaign. Through streaming TV, viewers cannot fast-forward through commercials. SDG&E ran one English and one Spanish TV commercial for a combined impression of over 3.4 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 7 million times (impressions) throughout the year, with over 15,000 customers clicking through to the CARE online application.

Bill Inserts

The annual CARE bilingual notification took place in July 2024. All customers who indicated a preference for paper bills received the bilingual application accompanied by their SDG&E bill. 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 2024. An example of the bill insert is included in Appendix C.

Email Campaigns

In 2024, SDG&E continued 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 creative email 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 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 2024, SDG&E sent over 556,000 bill comparison emails. Unique open rates, defined as how many people opened the email, were as high as 55%, indicating the subject lines were compelling to customers. By comparison, the energy industry-standard open rates are approximately 48%. CARE emails garnered an average click-through rate of 4.4%.

Direct Mail

SDG&E conducted a direct mail CARE campaign in 2024. SDG&E sent a letter to customers illustrating their bill savings if they were to enroll in CARE, similar to the emails 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 24,970 customers. Appendix C 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 2024 to discuss program effectiveness.

Live Call Campaign

The Harris Group (THG) utilized the data analysis from the CARE prospect list and continued 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 2024, the THG Live Call Campaign and CARE Recertification Campaign efforts resulted in over 21,841 completed CARE applications, contributed to over 16,610 new CARE enrollments, and over 3,436 CARE recertifications.

Outreach Partners

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, multicultural, multi-lingual, and AFN

communities. SDG&E also coordinated outreach tactics with CBOs to promote the CARE and ESA Programs to customers, which can deepen customer trust in the utility and create more enrollment opportunities. These outreach tactics included presentations, events, and messaging to increase awareness and drive enrollments. SDG&E also educates partners with training materials on the CARE Program, including how to utilize the program's online application to streamline the enrollment process for their organization. SDG&E also collaborated with these partners to provide education and engagement opportunities 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 serve these harder-to-reach customer segments continues to be valuable in generating program enrollments. SDG&E works alongside these external groups to connect customers with programs and solutions related to company offerings. These engagement efforts included over 700 events and presentations in 2024.

The County of San Diego Health and Human Services Agency is also part of the Energy Solutions Partner Network and enrolled 742 customers and recertified 350 others in the CARE Program throughout the year.

CARE Capitation Agencies

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 English Proficient (LEP) audiences. These partners include 211 San Diego, American Red Cross, Scripps Health, and San Diego State (University) WIC offices, and many others. These partners contributed over 1,800 CARE Program enrollments and 883 recertifications in 2024.

Energy Solutions Partner Network

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 program enrollment days. In 2024, over 1,700 activities were coordinated through this partner network to promote SDG&E's Customer Assistance Programs, resulting in over 1,300 social media messages by SDG&E's Energy Solutions Partner network, reaching over three million impressions. The Energy Solutions Partner Network's activities generated over 200 enrollments for CARE, and over 60 recertifications from this group in 2024.

Community Events & Presentations

Community outreach and engagement allow SDG&E to connect and directly engage customers with energy-saving solutions including CARE and ESA in the communities where they work and live. SDG&E has established relationships with non-profit organizations to deliver presentations, workshops, training, 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 700 events, including more than 45 multicultural events, presentations, and workshops to educate and reach over 96,000 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 CARE and ESA Programs in both English and Spanish while waiting to speak with an Energy Service Specialist (ESS) via the Interactive Voice Recognition (IVR) System. 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. There was one CARE enrollment and 42 recertifications for 2024 through the CCC or chat.

In 2024, due to declining payment volumes and increased operating costs, SDG&E sought authorization to close its remaining branch offices, which was subsequently granted, permanently closing the branch offices effective September 6, 2024.⁴¹

Prior to their closure in 2024, SDG&E's branch payment offices promoted and offered the CARE and ESA Programs to potentially eligible customers, and enrolled customers directly into the program. Additionally, the outreach team collaborated with the branch offices to educate customers on programs and services and assisted customers with completing the online application during the branch office visit if needed during peak times of year.

As an alternative to the Branch Offices, customers are encouraged to utilize alternate payment options or locations such as alternative payment locations (APL) My Energy Center, and Bill Matrix. SDG&E notes that non-CARE customers contacting the CCC are helped in determining program eligibility and support in enrolling into programs. In 2024, the Branch Offices contributed 679 customer enrollments and 177 recertifications into the CARE Program.

Additionally, prior to the closing of the Branch Offices, SDG&E held 35 My Energy Center workshops to inform customers about the closures scheduled in September. These customers were educated on how to enroll and utilize the My Energy Center tool, electronic payment options, going paperless, and Customer Assistance programs including CARE and ESA.

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

In 2024, approximately 185,884 (61%) CARE customers received a Home Energy Report (HER), representing 21% of the 900,000 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, 207,708 CARE customers signed up through the HER Program to receive emailed energy efficiency alerts to help them proactively manage their usage.

⁴¹ See SDG&E Advice Letter 4447-E-A/3304-G-A, submitted June 7, 2024 and effective July 8, 2024.

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

In 2024, SDG&E utilized different outreach methods to enroll eligible CARE customers. The effectiveness of each outreach method is measured differently. Some outreach methods are measured by 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 21,841 submitted CARE applications and enrolled over 16,610 new CARE customers, a 76% conversion rate. The campaign also resulted in 3,436 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 2024, SDG&E ended the program year with a 106% 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 (88%) and expect to continue participating. The surveys also provided the following insights:

- Overall satisfaction with SDG&E has reversed course for the first time since 2020 and is up significantly (71% vs. 63%);
- Understanding of the enrollment process continues to rank high at (91%);

- The portion of customers who say they would provide income verification remains high, but has decreased since last year, along with the percentages of those aware of income verification and those aware of the re-enrollment process;
- Email continues as the most-preferred method for receiving renewal communications; and
- The most common recommendation is to provide a larger discount.

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 2024, SDG&E received 215 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 2024, SDG&E provided over 649,430 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) system⁴² 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 EECP 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.

⁴² A customer is determined to be eligible based on the prior treated date.

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 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 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.

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 Department of Community Services and Development (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 promotes CSD's LIHEAP bill payment assistance and weatherization program and includes CSD's LIHEAP 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 informs customers about services offered by CSD and refers customers to CSD for additional bill assistance through LIHEAP. Lastly, SDG&E's agreement with 211 San Diego requires part of the customer screening performed by 211 to include referral to LIHEAP agencies such as CUI and MAAC, as appropriate. In 2024, 211 San Diego handled approximately 74,429 utility-related calls and referred 13,712 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 2024, pursuant to Ordering Paragraph 6 of D.21-06-015, SDG&E implemented the new recertification cycle for Expanded CARE customers. The new recertification cycle increased from two to four years, which allows Expanded CARE customers to remain in the program for a longer period, and in return, reduces the processing time and costs associated with processing recertifications.

Additionally, the SDG&E Outreach team conducted refresher training on the CARE application and its required fields to ensure that applications were processed promptly and without issues. During outreach booth events, to boost cost-effectiveness and address the diverse needs of customers, the team displayed a QR code in addition to printed enrollment forms, simplifying the enrollment process and reducing paper usage. The Outreach team proactively engaged with event attendees by approaching them and initiating a conversation rather than waiting for them to visit the booth.

2.4.10 Low CARE Enrollment Rate Zip Codes: Identify the low CARE enrollment zip codes, including the names of the cities, and discuss the strategies that were effective or not effective in targeting and enrolling these hard-to-reach households. Include the IOU's corrective action plans and ME&O strategies to maintain and bolster enrollment in these zip codes that fall into these categories.

SDG&E strategically considers low enrollment zip codes when distributing monthly bill comparison emails and direct mail to potentially eligible customers. Additionally, these zip

codes are utilized for targeting paid search, social media, and display advertising. Out-of-home advertising placements are selected in or near neighborhoods or train lines with higher potential for enrollment.

In 2025, SDG&E will continue awareness advertising in high-enrollment zip codes, but tactics will be adjusted to allocate budget more effectively towards low enrollment zip code areas that require increased enrollment support.

Low CARE Enrollment Rate Zip Codes	City
92102, 92105, 92113, 92114	San Diego (various neighborhoods)
91950	National City
91910, 91911	Chula Vista
91945	Lemon Grove
92173	San Ysidro
92021	El Cajon

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 120 days prior to the eligibility end date. 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 underserved. Include comparisons of effectiveness and cost-effectiveness of comparable customer segments, if available.

In 2024, 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 16,610 CARE enrollments and 3,436 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 1,659 CARE enrollments and 724 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. It is important to utilize multiple tactics for the harder-to-reach and underserved audiences. 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 2024, SDG&E's online advertising garnered over 39 million impressions (the number of times an online user saw an SDG&E ad) and ethnic print advertising had a readership of over 645,000. 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 takes for customers to apply; 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

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

As reported in the Amended 2023 Low Income Annual Report, SDG&E identified an operational error where certain LIHEAP customers were not auto enrolled in CARE.⁴³ This issue impacted a total of 101 LIHEAP customers in 2024. SDG&E manually enrolled all impacted customers in CARE in May 2024. SDG&E has provided bill corrections to all impacted customers for the period they were not on the CARE rate pursuant to SDG&E Tariff Electric and Gas Rule 18.C.

As reported in its 2024 FERA Annual Report, SDG&E identified a clerical billing issue that resulted in 169 FERA and 26 CARE customers not receiving their billing discount for a portion of their enrollment period. The issue has since been corrected and in accordance with SDG&E Tariff Electric and Gas Rule 18.C, SDG&E has applied a credit to all impacted customers.⁴⁴

Lastly, SDG&E discovered discrepancies between the number of active enrollments and the number of enrollments reflected in the billing system for certain CARE, FERA, and MBL customers. The cause was determined to be due to clerical system errors causing incorrect billing for these customers. The issue impacted 713 customers (474 CARE, 28 FERA, 211 MBL). Mitigation concluded in November 2024. SDG&E is currently in the process of completing bill corrections to the impacted customers pursuant to SDG&E Tariff Electric and Gas Rule 18.C.

⁴³ Amended Annual Report Activity of San Diego Gas and Electric on Energy Savings Assistance, California Alternate Rates for Energy, and Family Electric Rate Assistance Programs for 2023, November 11, 2024, at 19.

⁴⁴ Annual Report Activity of San Diego Gas & Electric Company on Family Electric Rate Assistance Program for 2024, March 3, 2025, at 26.

2.7 Pilots

There were no CARE pilots to report for 2024.

2.8 Studies

2025 Low Income Needs Assessment (LINA) Study

See section 1.8.1 for more information on the 2025 LINA study.

CHANGES Evaluation

In January 2024, the study team met twice to coordinate a pre-scoping workshop for the upcoming CHANGES evaluation. Discussions focused on workshop notification strategies and reviewing draft presentation materials. On February 14, 2024, a pre-scoping public workshop was held to introduce the CHANGES evaluation and solicit input from stakeholders. A representative from the California Public Utilities Commission (CPUC) led the workshop; however, no public comments were received. Following the workshop, the study team planned subsequent meetings to continue discussions on scope development.

The study team met several times during the year to discuss and refine the work scope for the study. In August 2024, the study team refined the work scope, defining two primary objectives: (1) to characterize the demographics and needs of customers served by the CHANGES Program and (2) to identify best practices from similar programs that could inform CHANGES. PG&E released the Request for Proposal (RFP) for the study on October 23, 2024, and held a bidders' conference on October 30, 2024. Four proposals were received and reviewed in December. The study team will select a winning bidder and commence the study in 2025.

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

Identify recommendations provided by the working group to improve program performance that were adopted by the IOU.

As described in Section 1.10 above, the CARE/FERA PEV SWG ended activity at the close of the 2023 PY and the IOUs presented their conclusive annual findings in the ESA WG June 2024 Public Meeting. There were no CARE working groups in 2024.

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 addresses 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 D.21-06-015 Attachment 6.

3 CARE EXPANSION PROGRAM

The CARE Expansion Program is available for qualifying nonprofit, group living facilities and agricultural employee housing facilities.⁴⁵

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.

2024	Commercial		Residential	
Month	Electric	Gas	Electric	Gas
Jan	86	47	370	116
Feb	87	47	370	116
Mar	89	46	301	100
Apr	82	40	261	80
May	89	43	271	81
Jun	86	40	231	82
Jul	87	40	229	80
Aug	87	40	242	91
Sep	97	42	268	96
Oct	94	41	262	91
Nov	93	41	262	91
Dec	89	39	265	93

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

⁴⁵ P.U. Code Section 739.1(i) as amended by AB 2672.

Facility Type	Electric	Gas
Commercial	7,257	3,326
Residential	4,238	770

3.2 Usage Information

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

Commodity	Residential	Commercial
Gas	41.84	588.92
Electric	403.08	13,642.10

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	-\$1,491.92
Residential Facility Electric Discount	-\$17,562.29

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

Commercial Facility Gas Discount	-\$2,073.09
Commercial Facility Electric Discount	-\$19,698.61

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.

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

SDG&E finds that 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 CBOs who work directly with potentially eligible customers.

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 the 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 2024, SDG&E completed two email campaigns targeting potentially eligible Expanded CARE agricultural and non-profit group facilities. Over 8,600 emails were sent to agricultural customers, garnering 45.8% open rate and a 4.3% click-through rate (CTR). Over 5,600 emails were sent to non-profit group facilities, garnering a 44.8% open rate and a 3.5% CTR. In 2024, the Expanded CARE email campaign was executed with zero direct costs due to the minimal volume of emails, which were subsidized by alternative funding sources. This demonstrates the cost-efficiency of utilizing email marketing for Expanded CARE. Furthermore, given the highly targeted nature of the eligible population, broad-based awareness strategies would be ineffective.

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 Program 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.

There were no issues or events that significantly affected program management in 2024.

4 FAMILY ELECTRIC RATE ASSISTANCE PROGRAM ANNUAL REPORT

In 2024, Senate Bill (SB) 1130 was signed into law, requiring the electric IOUs to submit a FERA report by March 1 of every year, highlighting compliance with the requirements of the legislation. In compliance, SDG&E filed its Annual Report on FERA for 2024 on March 3, 2025.⁴⁶ A revision to the FERA fund shifting activity initially reported in the FERA Annual Report is included in Section 5.3 below. Additionally, corresponding FERA Tables 1-8 are included in Appendix A of this report.

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 2024, 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 between electric and gas budgets within the program year. SDG&E used excess funds from the Enclosure, In Home Education, and General Administration categories to cover a total of \$2,455,975 in over spent funds in Appliances, HVAC, Miscellaneous, Customer Enrollment, Implementer Compensation, and Inspections.

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.

During 2024, SDG&E shifted CARE funds in accordance with the rules set forth in D.21-06-015, which granted the IOUs authority to shift funds between CARE Program categories within the program year. SDG&E used excess funds from the Outreach and IT Programming categories to cover a total of \$1,149,298 in over spent funds in the Processing, Certification, and Recertification category.

⁴⁶ Annual Report of San Diego Gas & Electric Company on Family Electric Rate Assistance Program for 2024. (March 3, 2025)

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.

In its 2024 FERA Annual Report, filed March 3, 2025, SDG&E reported fund shifting in accordance with Section 10.5.8.2 of D.21-06-015, to cover \$78,268 in overages in the Marketing, Education & Outreach; Processing, Certification, and Recertification; and Post Enrollment Verification categories. SDG&E clarifies that the total overages for FERA in 2024 covered by fund shifting are \$84,601 in the Marketing, Education & Outreach; Processing, Certification, and Recertification; and Post Enrollment Verification categories.⁴⁷

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?

There were no fund shifts that occurred outside of the rules laid out in D.21-06-015.

⁴⁷ Previously, the final financial cutoff date used in SDG&E's Annual Report on FERA Activity for 2024, filed on March 3, 2025, was January 31, 2025. SDG&E has updated FERA's financial cutoff to April 30, 2025, to capture any trailing invoices related to Program Year 2024 and to align with CARE's financial cutoff.

6 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
MF	Multifamily Properties
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 – ESA, CARE and FERA Program Tables

- Summary Highlights – ESA, CARE, and FERA Programs
 - ESA Program Summary Table 1 – Overall Program Expenses and Energy and Demand Savings
 - ESA Program – Table 1 – ESA Main Overall Program Expenses
 - Table 1A-1 – MFWB Program Expenses
 - Table 1A-2 – Pilot Plus and Pilot Deep Program Expenses
 - Table 1A-3 – Building Electrification Program Expenses
 - Table 1A-4 – Clean Energy Homes Program Expenses
 - Table 1A-5 – CSD Leveraging Program Expenses
 - ESA Program – Table 2 – ESA Main Expenses & Energy Savings by Measures Installed
 - Table 2A – MFWB
 - Table 2A-1 ESA Program - Multifamily Whole Building - Southern Region
 - Table 2A-2 ESA Program - Multifamily Whole Building - San Diego Gas & Electric Company
 - Table 2B – ESA Table 2B- ESA Pilot Plus and Pilot Deep Expenses and Energy Savings by Measures Installed
 - Table 2E - ESA CSD Leveraging Expenses and Energy Savings by Measures Installed
 - ESA Program – Table 3 – ESA Table 3 - Program Cost Effectiveness
 - ESA Program – Table 4 – ESA 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 10A-10D – ESA Bill Savings Calculations
 - ESA Program – Table 11 – Fund Shift Amount
 - ESA Program – Table 12A-12C – ESA Categorical and Other Enrollment
 - ESA Program – Table 13A – ESA Leveraging & 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 – ESA Tribal Outreach
 - ESA Program – Table 16A-16E – ESA Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions
-
- CARE Program – Table 1 – CARE Overall Program Expenses

- CARE Program – Table 2 – CARE Enrollment, Re-certification, Attrition, and Enrollment Rate
- CARE Program – Table 3A - 3D - CARE Post-Enrollment Verification Results
- CARE Program – Table 4 – CARE Self Certification and Re-Certification
- CARE Program – Table 5 – CARE Enrollment by County
- CARE Program – Table 6 – CARE Re-certification Results
- CARE Program – Table 7 – CARE Capitation Contractors
- CARE Program – Table 8 – CARE Participants As of Month-End
- CARE Program – Table 9 – CARE Average Monthly Usage & Bill
- CARE Program – Table 10 – CARE Surcharge & Revenue
- CARE Program – Table 11 – CARE Capitation Applications
- CARE Program – Table 12 – CARE Expansion Program
- CARE Program – Table 13 – CARE High Usage Verification Results
- CARE Program – Table 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

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- FERA Program – Table 1 – FERA Overall Program Expenses
 - FERA Program – Table 2 – FERA Enrollment, Re-certification, Attrition, and Penetration Rate
 - FERA Program – FERA Table 3A-3D - FERA Post-Enrollment Verification Results
 - FERA Program – FERA Table 4A-4B - FERA Self-Certifications, Self-Recertification Applications and Post-Enrollment Verifications
 - 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

**San Diego Gas & Electric Company
Energy Savings Assistance (ESA) Program
California Alternate Rates for Energy (CARE) Program and
Family Electric Rate Assistance (FERA) Program
2024 Summary Highlights**

ESA Program			
2024 Energy Savings Assistance Program Summary ¹			
2024	Authorized / Forecasted Planning Assumptions	Actual	%
Budget	\$ 30,210,212	\$ 19,833,003	66%
Funded from Pre-2024 Unspent Funds ²	\$ 10,605,447	\$ -	0%
Summary Homes Treated	14,138	9,576	68%
Summary kWh Saved	2,769,999	1,769,957	62%
Summary kW Demand Reduced	404	241	58%
Summary Therms Saved	115,389	75,791	64%

¹ This includes all ESA programs for the reporting period: ESA Main, Multifamily Whole Building, Pilot Plus and Pilot Deep, SPOC, and SASH & MASH. Refer to ESA Summary Table 1 for a breakdown of budget and expense by program.

² As of the end of program year 2023, the cumulative Pre-2024 unspent funds available totaled \$5,626,078 for MFWB, \$2,824,866 for PPPD, and \$2,154,503 for ESA Main contracts. Refer to ESA Table 11 for a breakdown of unspent committed funds available for the current program cycle.

SDG&E did not utilize any Pre-2024 Unspent Funds in the 2024 program year.

CARE Program			
2024 CARE Program Summary			
2024	Authorized Budget	Actual	%
Administrative Expenses	\$ 7,013,368	\$ 5,812,203	83%
Discounts/Subsidies	\$ 124,031,180	\$ 212,441,434	171%
Service Establishment Charge	\$ -	\$ -	0%
Total Program Costs and Discounts	\$ 131,044,548	\$ 218,253,637	167%
2024 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc.	Self Certified as Income or Categorically Eligible	Self Certified as Recertification
Method	1,775	69,721	106,738
2024 CARE-Enrollment Rate	Estimated Eligible Participants	Participants	Enrollment Rate
Total Enrolled	289,930	305,902	106%

FERA Program			
2024 FERA Program Summary			
2024	Authorized Budget	Actual	%
Administrative Expenses	\$ 621,815	\$ 657,230	106%
Discounts/Subsidies	\$ 4,444,713	\$ 3,827,621	86%
Service Establishment Charge	\$ -	\$ -	0%
Total Program Costs and Discounts	\$ 5,066,528	\$ 4,484,851	89%
2024 FERA New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc.	Self Certified as Income or Categorically Eligible	Self Certified as Recertification
Method	58	7,649	2,151
2024 FERA-Enrollment Rate	Estimated Eligible Participants	Participants	Enrollment Rate
Total Enrolled	41,374	12,768	31%

San Diego Gas & Electric Company
ESA Summary Table 1 - Expenses, and Energy and Demand Savings Summary
Program Year 2024 Annual Report

ESA Summary Table 1A - Expenses Summary									
	Authorized Budget ¹			Year to Date Expenses			% of Budget Spent YTD		
ESA Program Expenses:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Main Program (SF and MH) ²	\$ 9,587,680	\$ 9,289,125	\$ 18,876,805	\$ 6,928,581	\$ 8,771,326	\$ 15,699,907	72%	94%	83%
ESA Multifamily Whole Building ³	\$ 6,039,367	\$ 2,974,721	\$ 9,014,088	\$ 2,014,391	\$ 1,028,265	\$ 3,042,656	33%	35%	34%
ESA Pilot Plus and Pilot Deep ³	\$ 763,342	\$ 763,342	\$ 1,526,683	\$ 403,205	\$ 403,205	\$ 806,411	53%	53%	53%
ESA SPOC	\$ 238,688	\$ 238,688	\$ 477,376	\$ 142,015	\$ 142,015	\$ 284,029	59%	59%	59%
Building Electrification Retrofit Pilot ⁴									
Clean Energy Homes New Construction Pilot ⁴									
CSD Leveraging (N/A for SDG&E)									
SASH and MASH Unspent Funds ⁵	\$ 315,260	\$ -	\$ 315,260				0%	0%	0%
ESA Portfolio Total	\$ 16,944,337	\$ 13,265,875	\$ 30,210,212	\$ 9,488,191	\$ 10,344,811	\$ 19,833,003	56%	78%	66%

¹ 2024 ESA Portfolio budget authorized in D.21-06-015, Attachment 1, Table 11, unless otherwise specified.

² As of the end of program year 2023, \$2,154,503 in pre-2024 unspent committed ESA Main contract funds remained available but were excluded from the totals above. Refer to ESA Table 11 for a breakdown of the unspent committed funds available to the current program cycle.

³ In accordance with D.21-06-015, OP 181, MFWB & PPPD funds not expended in previous program years will be available to the MFWB & PPPD programs throughout the 2023-2026 program cycle. As of the end of program year 2023, the cumulative committed unspent funds excluded above totaled \$5,626,078 for MFWB and \$2,828,866 for PPPD.

⁴ Pilots are applicable to SCE only.

⁵ In accordance with OP 12 of D.15-01-027, any remaining unspent and unencumbered SASH/MASH program funds are to be redirected to low-income energy efficiency programs that benefit ratepayers in residential housing. On October 31, 2023, SDG&E submitted Advice Letter 4285-E, which became effective on November 30, 2023. Subsequently, \$315,260 in unspent SASH/MASH funds was transferred to the Low Income Energy Efficiency Balancing Account (LIEEBA) – Electric in December 2023. These funds will primarily support the implementation of the ESA Main Program.

ESA Summary Table 1B - Energy and Demand Savings									
	Authorized / Forecasted Planning			Actual			%		
ESA Program:	kWh	kW	Therms	kWh	kW	Therms	kWh	kW	Therms
ESA Main Program (SF and MH) ¹	1,496,098	218	42,191	1,167,957	183	49,401	78%	84%	117%
ESA Multifamily Whole Building ²	1,273,901	186	73,198	601,162	58	26,362	47%	31%	36%
ESA Pilot Plus and Pilot Deep	N/A	N/A	N/A	838	0	28	N/A	N/A	N/A
Building Electrification Retrofit Pilot ³									
Clean Energy Homes New Construction Pilot ³									
CSD Leveraging ⁴									
ESA Program TOTAL	2,769,999	404	115,389	1,769,957	241	75,791	64%	60%	66%

¹ Energy and demand savings for PY 2024 includes ESA Main only

² Savings for MFWB for both In-unit and Common Area.

³ Pilots are applicable to SCE only.

⁴ SDG&E does not currently have a leveraging agreement with CSD

San Diego Gas & Electric Company
ESA Table 1 - ESA Main (SF, MH, MF In-Unit) Overall Program Expenses
Program Year 2024 Annual Report

	2024 Authorized Budget ¹			2024 Annual Expenses			% of Budget Spent ²		
ESA Main Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency ³									
Appliances	\$ 829,194	\$ 455,690	\$ 1,284,884	\$ 1,280,100	\$ 98,818	\$ 1,378,918	154%	22%	107%
Domestic Hot Water	\$ 49,805	\$ 1,610,372	\$ 1,660,178	\$ 42,145	\$ 1,362,677	\$ 1,404,821	85%	85%	85%
Enclosure	\$ 1,734,899	\$ 2,299,750	\$ 4,034,649	\$ 686,415	\$ 909,898	\$ 1,596,313	40%	40%	40%
HVAC	\$ 1,412,707	\$ 1,061,482	\$ 2,474,189	\$ 122,809	\$ 2,761,687	\$ 2,884,496	9%	260%	117%
Maintenance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Lighting	\$ 1,243,299	\$ -	\$ 1,243,299	\$ 391,418	\$ -	\$ 391,418	31%	0%	31%
Miscellaneous	\$ 455,946	\$ -	\$ 455,946	\$ 767,448	\$ -	\$ 767,448	168%	0%	168%
Customer Enrollment	\$ 791,717	\$ 791,717	\$ 1,583,434	\$ 1,387,250	\$ 1,387,250	\$ 2,774,500	175%	175%	175%
In Home Education	\$ 434,465	\$ 434,465	\$ 868,930	\$ 110,629	\$ 110,629	\$ 221,257	25%	25%	25%
Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Implementer Compensation	\$ 285,478	\$ 285,478	\$ 570,957	\$ 480,664	\$ 480,664	\$ 961,328	168%	168%	168%
Energy Efficiency TOTAL	\$ 7,237,510	\$ 6,938,955	\$ 14,176,465	\$ 5,268,877	\$ 7,111,623	\$ 12,380,499	73%	102%	87%
Training Center	\$ 124,152	\$ 124,152	\$ 248,304	\$ -	\$ -	\$ -	0%	0%	0%
Inspections	\$ 51,872	\$ 51,872	\$ 103,744	\$ 81,219	\$ 81,219	\$ 162,439	157%	157%	157%
Marketing and Outreach	\$ 793,681	\$ 793,681	\$ 1,587,362	\$ 693,181	\$ 693,181	\$ 1,386,361	87%	87%	87%
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Measurement and Evaluation Studies	\$ 25,000	\$ 25,000	\$ 50,000	\$ 14,275	\$ 14,275	\$ 28,549	57%	57%	57%
Regulatory Compliance	\$ 147,815	\$ 147,815	\$ 295,630	\$ 105,236	\$ 105,236	\$ 210,472	71%	71%	71%
General Administration	\$ 1,179,476	\$ 1,179,476	\$ 2,358,952	\$ 764,347	\$ 764,347	\$ 1,528,694	65%	65%	65%
CPUC Energy Division	\$ 28,174	\$ 28,174	\$ 56,348	\$ 1,446	\$ 1,446	\$ 2,892	5%	5%	5%
Administration Subtotal	\$ 2,350,170	\$ 2,350,170	\$ 4,700,340	\$ 1,659,704	\$ 1,659,704	\$ 3,319,408	71%	71%	71%
TOTAL PROGRAM COSTS	\$ 9,587,680	\$ 9,289,125	\$ 18,876,805	\$ 6,928,581	\$ 8,771,326	\$ 15,699,907	72%	94%	83%
Funded Outside of ESA Program Budget									
Indirect Costs				\$ 665,637	\$ 675,249	\$ 1,340,886			
NGAT Costs		\$ 468,000	\$ 468,000		\$ 334,863	\$ 334,863		72%	72%

ESA Program Administrative Expenses ⁴									
10% Administrative Cap						\$ 1,399,470			
Total Program Costs						\$ 15,699,907			
% of Administrative Spend						8.91%			

¹ 2024 ESA Main Portfolio budget authorized in D.21-06-015, Attachment 1, Table 11 is \$29,894,951. As of the end of program year 2023, \$2,154,503 in pre-2024 unspent committed ESA Main contract funds remained available but were excluded from the totals above. Refer to ESA Table 11 for a breakdown of the unspent committed funds available to the current program cycle.

² In D.21-06-015, the Commission revised the fund shift rules allowing flexibility to shift funds between the categories and fuel type. Any fund shifts between the categories and fuel type are reflected in ESA Table 11.

³ Energy Efficiency category budgets are based on the Low Income Application forecast, with adjustments made to support the current program design.

⁴ 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, as authorized in Section 6.15.7.7 of D.21-06-015.

San Diego Gas & Electric Company
ESA Table 1A Program Expenses Summary
Program Year 2024 Annual Report

ESA Table 1A-1 - Multifamily Whole Building Program Expenses

ESA Program (MFWB):	2024 Authorized / Forecasted Budget ¹			2024 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Multifamily Whole Building ²	\$ 6,039,367	\$ 2,974,721	\$ 9,014,088	\$ 2,014,391	\$ 1,028,265	\$ 3,042,656	33%	35%	34%
ESA SPOC	\$ 238,688	\$ 238,688	\$ 477,376	\$ 142,015	\$ 142,015	\$ 284,029	59%	59%	59%
TOTAL	\$ 6,278,055	\$ 3,213,409	\$ 9,491,464	\$ 2,156,405	\$ 1,170,280	\$ 3,326,685	34%	36%	35%

¹ 2024 ESA MFWB and ESA SPOC budget authorized in D.21-06-015, Attachment 1, Table 11.

² In accordance with D.21-06-015, OP 181, MFWB funds not expended in previous program years will be available to the MFWB program throughout the 2023-2026 program cycle. As of the end of program year 2023, the cumulative unspent committed funds excluded above totaled \$5,626,078.

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

	2024 Authorized / Forecasted Budget ³			2024 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Pilot Plus and Pilot Deep Program ⁴	\$ 763,342	\$ 763,342	\$ 1,526,683	\$ 403,205	\$ 403,205	\$ 806,411	53%	53%	53%
TOTAL	\$ 763,342	\$ 763,342	\$ 1,526,683	\$ 403,205	\$ 403,205	\$ 806,411	53%	53%	53%

³ 2024 ESA Pilot Plus and Pilot Deep Program budget authorized in D.21-06-015, Attachment 1, Table 11.

⁴ In accordance with D.21-06-015, OP 181, PPPD funds not expended in previous program years will be available to the PPPD program throughout the 2022-2026 program cycle. As of the end of program year 2023, the cumulative unspent committed funds excluded above totaled \$2,824,865.

ESA Table 1A-3 - Building Electrification Expenses ⁵

	2024 Authorized / Forecasted Budget			2024 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Building Electrification Program			\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%

⁵ Pilots is applicable to SCE only. N/A for SDG&E.

ESA Table 1A-4 - Clean Energy Homes Expenses ⁵

	2024 Authorized / Forecasted Budget			2024 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Clean Energy Homes Program			\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%

⁵ Pilots is applicable to SCE only. N/A for SDG&E.

ESA Table 1A-5 - Leveraging - CSD Expenses

	2024 Authorized / Forecasted Budget			2024 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Program Leveraging - CSD			\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%

Note: N/A for SDG&E.

San Diego Gas & Electric Company
ESA Table 2 - ESA Main (SF, MH) Expenses and Energy Savings by Measures Installed
Program Year 2024 Annual Report

ESA Main Program Total 2024 Completed & Expensed Installation												
		Basic	Plus	Units	Quantity Installed	kWh ¹ (Annual)	kW ¹ (Annual)	Therms ¹ (Annual)	Expenses (\$)	% of Expenditures	Effective Useful Life (years)	2024 Total Measure Life Cycle Bill Savings
Appliances												
Clothes Dryer				Each	118	5,049	1	160	\$ 143,379	1.3%	12	\$ 18,603.83
Dish Washer				Each						0.0%	11	
Freezer				Each						0.0%	11	
High Efficiency Clothes Washer				Each	175	7,165	1	1,783	\$ 179,326	1.6%	11	\$ 53,159.23
Induction Cooking Appliance-FS - New				Each						0.0%		
Microwave				Each						0.0%		
Refrigerator				Each	823	449,354	54	-	\$ 1,056,213	9.2%	14	\$ 1,593,711.68
Domestic Hot Water												
Combined Showerhead/TSV				Home	14	-	-	133	\$ 1,170	0.0%	10	\$ 2,255.69
Faucet Aerator				Each						0.0%	10	
Heat Pump Water Heater				Each						0.0%	10	
Heat Pump Water Heater - Electric				Each						0.0%	10	
Heat Pump Water Heater - Gas				Each						0.0%	10	
Heat Pump Water Heater - Propane				Each						0.0%	10	
Low-Flow Showerhead				Home						0.0%	10	
Solar Water Heating				Home						0.0%		
Other Domestic Hot Water ⁵				Home	7,161	44,761	9	41,770	\$ 342,761	3.0%	10	\$ 820,168.91
Tankless Water Heater				Each						0.0%		
Thermostatic Shower Valve				Each						0.0%		
Thermostatic Shower Valve Combined Showerhead				Each						0.0%	10	
Thermostatic Tub Spout/Diverter				Each						0.0%		
Water Heater Repair/Replacement				Each	331	-	-	7,994	\$ 1,000,938	8.8%	11	\$ 148,790.15
Water Heater Repair/Replacement Inspection				Each	269	-	-	-	\$ 39,125	0.3%		\$ -
Water Heater Tank and Pipe Insulation				Each	191	118	0	1,769	\$ 20,827	0.2%	4	\$ 12,092.80
Enclosure ²												
Air Sealing				Home	3,058	76,544	16	(9,096)	\$ 1,457,951	12.8%	3	\$ 12,000.44
Attic Insulation				Area-ft2	93,488	7,570	5	1,705	\$ 138,362	1.2%	30	\$ 144,073.47
Attic Insulation CAC NonElect Heat - New				Home						0.0%		
Caulking				Home						0.0%		
Diagnostic Air Sealing				Home						0.0%		
Floor Insulation				Home						0.0%		
Minor Home Repairs				Home						0.0%		
HVAC ³												
Central A/C replacement				Each						0.0%		
Central Heat Pump-FS (propane or gas space)				Home						0.0%		
Duct Test and Seal				Each						0.0%		
Energy Efficient Fan Control				Each						0.0%		
Evaporative Cooler (Installation)				Each						0.0%		
Evaporative Cooler (Replacement)				Each						0.0%		
Furnace Repair/Replacement				Home	979	152,264	49	6,180	\$ 2,601,365	22.8%	20	\$ 980,598.44
Furnace Repair/Replacement Inspection				Home	562	-	-	-	\$ 80,875	0.7%		\$ -
Heat Pump Replacement				Home						0.0%		
Heat Pump Replacement - CAC Gas - New				Home						0.0%		
Heat Pump Replacement - CAC Propane - New				Home						0.0%		
High Efficiency Forced Air Unit (HE FAU)				Home						0.0%		
High Efficiency Forced Air Unit (HE FAU) - Early Replacement				Home						0.0%		
High Efficiency Forced Air Unit (HE FAU) - On Burnout				Home						0.0%		
Portable A/C				Each	1	41	0	-	\$ 685	0.0%	9	\$ 55,818.85
Prescriptive Duct Sealing				Home						0.0%		
Removed - A/C Time Delay				Each						0.0%		
Removed - FAU Standing Pilot Conversion				Each						0.0%		
Room A/C Replacement				Home	65	11,598	8	-	\$ 75,696	0.7%	9	\$ 26,443.49
Smart Thermostat				Home	469	9,784	-	2,201	\$ 125,875	1.1%	9	\$ 94.39
Wholehouse Fan				Each						0.0%		
Maintenance												
Central A/C Tune up				Home						0.0%		
Furnace Clean and Tune				Home						0.0%		
HVAC Air Filter Service				Each						0.0%		
Condenser Coil Cleaning - New				Each						0.0%		
Evaporative Cooler - Maint Functioning - New				Each						0.0%		
Evaporative Cooler - Maint Non-Functioning - New				Each						0.0%		
Evaporative Cooler Maintenance				Home						0.0%		
Evaporator Coil - New				Each						0.0%		
Fan Control Adjust - New				Each						0.0%		
Range Hood				Home						0.0%		
Refrigerant Charge Adjustment - New				Each						0.0%		
Lighting												
Exterior Hard wired LED fixtures				Each						0.0%		
LED A-Lamps				Each	27,380	168,004	22	(3,734)	\$ 323,632	2.8%	16	\$ 579,877.34
LED R/BR Lamps				Each	3,907	65,378	8	(1,463)	\$ 67,786	0.6%	16	\$ 225,389.71
Removed - Interior Hard wired LED fixtures				Each						0.0%		
Removed - LED Night Light				Each						0.0%		
Removed - LED Torchere				Each						0.0%		
Removed - Occupancy Sensor				Each						0.0%		
Miscellaneous												
Air Purifier				Home	1,248	-	-	-	\$ 693,726	6.1%	9	\$ -
CO and Smoke Alarm				Each						0.0%		
Cold Storage				Home						0.0%		
Comprehensive Home Health and Safety Check-up				Home						0.0%		
Pool Pumps				Each						0.0%		
Smart Strip				Each	396	55,440	8	-	\$ 23,550	0.2%	2	\$ 28,089.65
Smart Strip Tier II				Each	600	114,886	2	(0)	\$ 50,172	0.4%	2	\$ 58,208.09
Pilots												
Customer Enrollment ⁸												
ESA Outreach & Assessment				Home	7,713				\$ 2,774,500	24.3%		
ESA In-Home Energy Education				Home	7,711				\$ 221,257	1.9%		
Total Savings/Expenditures												
						1,167,957	183	49,401	\$ 11,419,171	100%		\$ 4,759,376.15
Total Households Weatherized ⁷												
					3,084							
Households Treated												
				Total								
- Single Family Households Treated				Home	5,611							
- Multi-family Households Treated				Home	-							
- Mobile Homes Treated				Home	795							
Total Number of Households Treated												
				Home	6,406							
# Eligible Households to be Treated for PY ⁴				Home	3,983							
% of Households Treated				%	161%							
- Master-Meter Households Treated				Home	219							

ESA Main Program	Year to Date Expenses		
	Electric	Gas	Total
Administration ¹	\$ 1,659,704	\$ 1,659,704	\$ 3,319,408
Direct Implementation (Non-Incentive)	\$ 480,664	\$ 480,664	\$ 961,328
Direct Implementation	\$ 4,788,213	\$ 6,630,959	\$11,419,171
<<Includes measures costs			
Total ESA Main Costs	\$ 6,928,581	\$ 8,771,326	\$15,699,907

Notes:

¹ All savings are calculated based on the following sources: DNV/GL Impact Evaluation Program Years 2015-2017 Impact II, or ESA workpapers.

² Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

³ Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.

⁴ Based on D-21-06-015 Attachment 1, Table 6 targets.

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 "Administration" total includes all below-the-line expenses, which differ from "administrative costs" subject to the 10% cap. ESA program expenses subject to the 10% administrative cap follow the same definition and categorization of "administrative costs" as the energy efficiency programs, as authorized in Section 6.15.7.7 of D-21-06-015.

[illegible]

Methodically Properties Trained		Number
First Number of Methodically Properties Trained		162
Subtotal of Master-national Methodically Properties Trained		76,4
Methodically CANWIS Trained		Number
First Number of Methodically Trained CANWIS with Properties Trained		6,574
First Number of Training with Properties Trained		627
Methodically Household Trained (In-Call)		Number
First Number of Household Methodically Trained		3,118
Methodically CANWIS Trained		Number
First Number of CANWIS with Training Trained		3
MLER ISA Program - SFY08		
	Element	Year to Date Payments
		Total
Administration	\$ 129,975.01	\$ 29,481.01
Direct Implementation - New Recruits	\$ 105,733.01	\$ 20,425.01
Direct Implementation	\$ 662,943.01	\$ 22,017.01
SNIC	\$ 122,073.01	\$ 11,010.01
TOTAL SFY08 COSTS	\$ 2,208,480	\$ 1,376,280

(Includes measures and non-measure costs)

San Diego Gas & Electric Company
ESA Table 2B- ESA Pilot Plus and Pilot Deep Expenses and Energy Savings by Measures Installed
Program Year 2024 Annual Report

		ESA Program - Pilot Plus									ESA Program - Pilot Deep								
Measures	Units (Each or Home)	2024 Completed & Expensed Installation							2024 Total Measure Life Cycle Bill Savings	Units (Each or Home)	2024 Completed & Expensed Installation							2024 Total Measure Life Cycle Bill Savings	
		Quantity Installed	kWh ³ (Annual)	kW ³ (Annual)	Therms ³ (Annual)	Expenses (\$)	% of Expenditures	Effective Useful Life (years)			Quantity Installed	kWh ³ (Annual)	kW ³ (Annual)	Therms ³ (Annual)	Expenses (\$)	% of Expenditures	Effective Useful Life (years)		
Appliances																			
High Efficiency Clothes Washer	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Refrigerator	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Microwave	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Freezer	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Domestic Hot Water																			
Other Domestic Hot Water ⁴	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Water Heater Tank and Pipe Insulation	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Water Heater Repair/Replacement	Each	-	-	-	-	\$ -	0.0%	11 \$ -	-	Each	1	-	-	17 \$ 2,744	10.6%	11 \$ -	315		
Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Tab Diverter/ Tub Spout	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Thermostat-controlled Shower Valve	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Enclosures⁵																			
Air Sealing	Home	1	-	-	-	\$ 99	1.1%	3 \$ -	-	Home	1	-	-	-	\$ 176	0.7%	3 \$ -	-	
Caulking	Home	-	-	-	-	\$ -	0.0%	\$ -	-	Home	-	-	-	-	\$ -	0.0%	\$ -	-	
Attic Insulation	Area-ft2	1,992	36	-	9	\$ 5,478	58.3%	7 \$ 174	-	Area-ft2	1,230	22	-	6 \$ 3,383	13.1%	7 \$ 108	-		
HVAC⁶																			
FAU Standing Pilot Conversion	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Furnace Repair/Replacement	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Room A/C Replacement	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Central A/C replacement	Cap-Tons	-	-	-	-	\$ -	0.0%	15 \$ -	-	Cap-Tons	1	28	0	(1) \$ 9,860	38.2%	15 \$ 70	-		
Heat Pump Replacement	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Evaporative Cooler (Replacement)	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Evaporative Cooler (Installation)	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Duct Test and Seal	Cap-Tons	1	17	0	2	\$ 308	3.3%	18 \$ 146	-	Cap-Tons	-	-	-	-	\$ -	0.0%	18 \$ -	-	
Energy Efficient Fan Control	Each	1	264	0	-	\$ 244	2.6%	5 \$ 334	-	Each	-	-	-	-	\$ -	0.0%	5 \$ -	-	
Prescriptive Duct Sealing	Home	-	-	-	-	\$ -	0.0%	\$ -	-	Home	-	-	-	-	\$ -	0.0%	\$ -	-	
High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -	0.0%	\$ -	-	Home	-	-	-	-	\$ -	0.0%	\$ -	-	
A/C Time Delay	Home	-	-	-	-	\$ -	0.0%	\$ -	-	Home	-	-	-	-	\$ -	0.0%	\$ -	-	
Smart Thermostat	Home	-	-	-	-	\$ -	0.0%	\$ -	-	Home	-	-	-	-	\$ -	0.0%	\$ -	-	
Maintenance																			
Furnace Clean and Tune	Cap-Tons	3	16	0	(0)	\$ 446	4.8%	3 \$ 12	-	Cap-Tons	-	-	-	-	\$ -	0.0%	3 \$ -	-	
Central A/C Tune up	Cap-Tons	-	-	-	-	\$ -	0.0%	\$ -	-	Cap-Tons	-	-	-	-	\$ -	0.0%	\$ -	-	
Lighting																			
Interior Hard wired LED fixtures	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Exterior Hard wired LED fixtures	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
LED Torchiers	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Occupancy Sensor	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
LED Night Light	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
LED R/BR Lamps	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
LED A-Lamps	Each	-	-	-	-	\$ -	0.0%	\$ -	-	Each	-	-	-	-	\$ -	0.0%	\$ -	-	
Miscellaneous																			
HERS Testing	Home	1	-	-	-	\$ 350	2.6%	3 \$ -	-	Home	1	-	-	-	\$ 350	0.0%	3 \$ -	-	
Minor Home Repairs	Home	1	-	-	-	\$ 222	1.7%	3 \$ -	-	Home	-	-	-	-	\$ -	0.0%	3 \$ -	-	
Home Health and Safety Check-up	Home	1	-	-	-	\$ 75	0.6%	3 \$ -	-	Home	-	-	-	-	\$ -	0.0%	3 \$ -	-	
Efficient Windows and Insulated Doors	Area-ft2	-	-	-	-	\$ -	0.0%	20 \$ -	-	Area-ft2	163	455	-	(5) \$ 8,903	34.5%	20 \$ 2,141	-		
HVAC - Permit	Home	-	-	-	-	\$ -	0.0%	3 \$ -	-	Home	1	-	-	-	\$ 346	1.3%	3 \$ -	-	
Pilots																			
								\$ -	-								\$ -	-	
Customer Enrollment																			
ESA Outreach & Assessment	Home	32	-	-	-	\$ 3,548	0.0%	\$ -	-	Home	12	-	-	-	\$ 2,246	0.0%	\$ -	-	
ESA In-Home Energy Education	Home	18	-	-	-	\$ 2,518	26.8%	\$ -	-	Home	3	-	-	-	\$ 420	1.6%	\$ -	-	
Total Savings/Expenditures																			
			332	0	12	\$ 13,288	100.0%	\$ 667	-			505	0	16	\$ 28,427	100.0%	\$ 2,634	-	
Total Households Weatherized³																			
	1								-		1							-	
Households Treated																			
- Single Family Households Treated	Home	1							-	Home	1							-	
- Multi-family Households Treated	Home	-							-	Home	-							-	
- Mobile Homes Treated	Home	-							-	Home	-							-	
Total Number of Households Treated	Home	1							-	Home	1							-	
# Eligible Households to be Treated for PV	Home	N/A							-	Home	N/A							-	
% of Households Treated	%	N/A							-	%	N/A							-	
- Master-Meter Households Treated	Home	-							-	Home	-							-	

ESA Program - Pilot Plus and Pilot Deep	Year to Date Expenses		
	Electric	Gas	Total
Administration ⁸	\$ 174,617	\$ 174,617	\$ 349,233
Direct Implementation (Non-Incentive)	\$ 205,944	\$ 205,944	\$ 411,888
Direct Implementation	\$ 22,645	\$ 22,645	\$ 45,289
<<Includes measures costs and non-measure costs/payments.			
TOTAL Pilot Plus and Pilot Deep COSTS	\$ 403,205	\$ 403,205	\$ 806,411

Notes:
¹ Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.
² Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.
³ All savings are calculated based on the following sources: DNV-GL Impact Evaluation Program Years 2015-2017 Impact II, or ESA worksheets.
⁴ Other Domestic Hot Water includes the following parts: Faucet Aerator, Low Flow Showerhead, and Thermostatic shower valve.
⁵ Savings for HVAC measures vary by CZ and the total is inclusive of the variations.
⁶ "Administration" total includes all 'below-the-line' expenses, which differ from 'administrative costs' subject to the 10% cap. ESA program expenses subject to the 10% administrative cap follow the same definition and categorization of 'administrative costs' as the energy efficiency programs, as authorized in Section 6.15.7.7 of D.21-06-015.

San Diego Gas & Electric Company
ESA Table 2C - ESA Building Electrification (SCE only) Expenses and Energy Savings by Measures Installed
Program Year 2024 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	Effective Useful Life (years)	2024 Total Measure Life Cycle Bill Savings
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 [2]									
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			\$ -	<<Includes measures costs
TOTAL Building Electrification COSTS	\$ -	\$ -	\$ -	

San Diego Gas & Electric Company
Energy Savings Assistance Program Table 2D - Clean Energy Homes New Construction Pilot
Program Year 2024 Annual Report

		ESA Program - Clean Energy Homes New Construction Pilot					
		Monthly Total (Projects)	Monthly Total Units (Living Units)	Cumulative Program Launch-to-date Total (Projects)	Cumulative Program Launch-to-date Total Units (Living Units)	Estimated Incentive Expenses (\$)	% Incentive Budget
ESA CEH Program Offerings							
Interest Form submitted							
Interest Form denied							
Application for direct design assistance (in progress)							
Application for direct design assistance (completed)							
Applications for design incentive (in progress)							
Applications for design incentive (completed)							
Applications for tenant education incentive (in progress)							
Applications for tenant education incentive (completed)							
Total Savings/Expenditures							

ESA CEH Outreach and Education	Units	Monthly Total	YTD Total
Webinars	Number of webinars		
Active leads	Unique developer		

Design Assistance Completed Applications	Units	Quantity	Compliance Margin Designed kWh (Annual)*	Compliance Margin Designed BTU (Annual)*	Avoided CO2 Emissions	Estimated Incentive Expenses (\$)	% Incentive Budget
Direct Design Assistance	Living Units						
Design Incentive	Living Units						
Total Savings/Expenditures							

ESA Program - Clean Energy Homes	Year to Date Expenses		
	Electric	Gas	Total
Administration			
Direct Implementation (Non-Incentive)			
Direct Implementation			
TOTAL Clean Energy Homes COSTS			

<<Includes measures costs

San Diego Gas & Electric Company
ESA Table 2E - ESA CSD Leveraging Expenses and Energy Savings by Measures Installed
Program Year 2024 Annual Report

Measures	Units	ESA Program - CSD Leveraging							
		Year-To-Date Completed & Expensed Installation							
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure	Effective Useful Life (years)	2024 Total Measure Life Cycle Bill Savings
Appliances									
Clothes Dryer	Each	-	-	-	-	\$ -	0.0%	-	-
Dish Washer	Each	-	-	-	-	\$ -	0.0%	-	-
Freezer	Each	-	-	-	-	\$ -	0.0%	-	-
High Efficiency Clothes Washer	Each								
Induction Cooking Appliance-FS - New	Each								
Microwave	Each								
Refrigerator	Each								
Domestic Hot Water									
Combined Showerhead/TSV	Home	-	-	-	-	\$ -	0.0%	-	-
Faucet Aerator	Each	-	-	-	-	\$ -	0.0%	-	-
Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%	-	-
Heat Pump Water Heater - Electric	Each	-	-	-	-	\$ -	0.0%	-	-
Heat Pump Water Heater - Gas	Each	-	-	-	-	\$ -	0.0%	-	-
Heat Pump Water Heater - Propane	Each	-	-	-	-	\$ -	0.0%	-	-
Low-Flow Showerhead	Home	-	-	-	-	\$ -	0.0%	-	-
Solar Water Heating	Home	-	-	-	-	\$ -	0.0%	-	-
Other Domestic Hot Water	Home	-	-	-	-	\$ -	0.0%	-	-
Tankless Water Heater	Each	-	-	-	-	\$ -	0.0%	-	-
Thermostatic Shower Valve	Each								
Thermostatic Shower Valve Combined Showerhead	Each								
Thermostatic Tub Spout/Diverter	Each								
Water Heater Repair/Replacement	Each								
Water Heater Tank and Pipe Insulation	Each								
Enclosure									
Air Sealing	Home	-	-	-	-	\$ -	0.0%	-	-
Attic Insulation	Home	-	-	-	-	\$ -	0.0%	-	-
Attic Insulation CAC NonElect Heat - New	Home	-	-	-	-	\$ -	0.0%	-	-
Caulking	Home								
Diagnostic Air Sealing	Home								
Floor Insulation	Home								
Minor Home Repairs	Home								
HVAC									
Central A/C replacement	Each	-	-	-	-	\$ -	0.0%	-	-
Central Heat Pump-FS (propane or gas space)	Home	-	-	-	-	\$ -	0.0%	-	-
Duct Test and Seal	Each	-	-	-	-	\$ -	0.0%	-	-
Energy Efficient Fan Control	Each	-	-	-	-	\$ -	0.0%	-	-
Evaporative Cooler (Installation)	Each	-	-	-	-	\$ -	0.0%	-	-
Evaporative Cooler (Replacement)	Each	-	-	-	-	\$ -	0.0%	-	-
Furnace Repair/Replacement	Home	-	-	-	-	\$ -	0.0%	-	-
Heat Pump Replacement	Home	-	-	-	-	\$ -	0.0%	-	-
Heat Pump Replacement - CAC Gas - New	Home	-	-	-	-	\$ -	0.0%	-	-
Heat Pump Replacement - CAC Propane - New	Home	-	-	-	-	\$ -	0.0%	-	-
High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -	0.0%	-	-
High Efficiency Forced Air Unit (HE FAU) - Early	Home	-	-	-	-	\$ -	0.0%	-	-
High Efficiency Forced Air Unit (HE FAU) - On Board	Home								
Portable A/C	Each								
Prescriptive Duct Sealing	Home								
Removed - A/C Time Delay	Each								
Removed - FAU Standing Pilot Conversion	Each								
Room A/C Replacement	Home								
Smart Thermostat	Home								
Wholehouse Fan	Each								
Maintenance									
Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%	-	-
Furnace Clean and Tune	Home	-	-	-	-	\$ -	0.0%	-	-
HVAC Air Filter Service	Each								
Condenser Coil Cleaning - New	Each								
Evaporative Cooler - Maint Functioning - New	Each								
Evaporative Cooler - Maint Non-Functioning - New	Each								
Evaporative Cooler Maintenance	Home								
Evaporator Coil - New	Each								
Fan Control Adjust - New	Each								
Range Hood	Home								
Refrigerant Charge Adjustment - New	Each								
Lighting									
Exterior Hard wired LED fixtures	Each	-	-	-	-	\$ -	0.0%	-	-
LED A-Lamps	Each	-	-	-	-	\$ -	0.0%	-	-
LED R/BR Lamps	Each	-	-	-	-	\$ -	0.0%	-	-
Removed - Interior Hard wired LED fixtures	Each	-	-	-	-	\$ -	0.0%	-	-
Removed - LED Night Light	Each	-	-	-	-	\$ -	0.0%	-	-
Removed - LED Torchiera	Each	-	-	-	-	\$ -	0.0%	-	-
Removed - Occupancy Sensor	Each	-	-	-	-	\$ -	0.0%	-	-
Miscellaneous									
Air Purifier	Home	-	-	-	-	\$ -	0.0%	-	-
CO and Smoke Alarm	Each								
Cold Storage	Home								
Comprehensive Home Health and Safety Check-up	Each								
Pool Pumps	Each								
Smart Strip	Each								
Smart Strip Tier II	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			\$ -
TOTAL CSD Leveraging COSTS	\$ -	\$ -	\$ -

<<Includes measures costs

San Diego Gas & Electric Company
ESA Table 3 - Program Cost Effectiveness
Program Year 2024 Annual Report

Program	Ratio of Benefits Over Costs					Net Benefits \$		
	ESACET	Resource Test	TRC	PAC	RIM	ESACET	Resource Test	TRC
ESA Main (SF, MH)	0.24	0.22	0.12	0.13	0.10	(11,890,367)	(6,774,800)	(13,720,958)
MFWB (In-Unit, CAM/WB)	0.36	0.85	0.19	0.20	0.13	(2,120,456)	(111,423)	(2,680,904)
ESA Pilot Plus and Pilot Deep	0.00	0.02	0.00	0.00	0.00	(803,995)	(40,009)	(804,890)
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 greater 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.

All savings are calculated based on the following sources: DNV/GL Impact Evaluation Program Years 2015-2017 Impact II, or ESA workpapers.

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

San Diego Gas & Electric Company
ESA Table 4 - ESA Detail by Housing Type and Source¹
Program Year 2024 Annual Report

		2024 Energy Savings ²				
Customer	Housing Type	# Homes /Properties Treated	(mWh)	MW	(mTherm)	2024 Expenses
Gas and Electric Customers						
Owners - Total		2,471	700.220	0.119	37.164	\$ 8,316,199
	Single Family	1,801	666.940	0.109	35.346	\$ 6,494,190
	Multi Family ³	-	-	-	-	\$ 9,928
	Mobile Homes	670	33.279	0.010	1.818	\$ 1,812,081
Renters - Total		3,641	371.799	0.049	12.237	\$ 2,761,213
	Single Family	3,530	366.604	0.048	12.230	\$ 2,691,915
	Multi Family	-	-	-	-	\$ -
	Mobile Homes	111	5.195	0.000	0.008	\$ 69,298
Electric Customers (only)						
Owners - Total		114	59.344	0.009	-	\$ 211,518
	Single Family	105	54.422	0.009	-	\$ 196,142
	Multi Family	-	-	-	-	\$ -
	Mobile Homes	9	4.922	0.001	-	\$ 15,376
Renters - Total		180	36.594	0.006	-	\$ 130,242
	Single Family	175	35.667	0.006	-	\$ 126,366
	Multi Family	-	-	-	-	\$ -
	Mobile Homes	5	0.927	0.000	-	\$ 3,875
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		3,168	600.616	(0.058)	19.473	\$ 1,897,381
ESA Multifamily Common Area Measures		1	0.546	0.000	6.889	\$ 770,144
ESA Multifamily Whole Building		3,169	601.162	(0.058)	26.362	\$ 2,667,525
Totals:		9,575	1,769.119	0.125	75.763	\$ 14,086,697

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.

² All savings are calculated based on the following sources: DNV/GL Impact Evaluation Program Years 2015-2017 Impact II, or ESA workpapers. Savings for common area measures are sourced from approved workpapers.

³ Measures installed in 2023 for In-Unit activity that failed inspection were addressed and expensed in 2024 under ESA Main

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible Households Treated by Both Utilities in Shared Service Territory
2024	SoCalGas	17,868	8

San Diego Gas & Electric Company
ESA Table 5 - ESA Direct Purchases & Installation Contractors
Program Year 2024 Annual Report

Contractor	County	Contractor Type (Check one or more if applicable)				2024 Annual Expenditures ¹
		Private	CBO	WMDVBE	LIHEAP	
Richard Heath & Associates	San Diego	X		X		\$ 11,739,334
THA Heating and Air Conditioning Inc.	San Diego	X				\$ 2,572,557
Staples & Associates	San Diego					\$ 1,172,999
Maroma Energy Services	San Diego	X				\$ 457,177
Total Contractor Expenditures						\$ 15,942,067

¹ The expenditures paid to the contractors for program year 2024 covers ESA Main, Multi Family Whole Building (SDG&E only), and Pilot Plus and Pilot Deep programs.

San Diego Gas & Electric Company
ESA Table 6 - ESA Installation Cost of Program Installation Contractors ¹
Program Year 2024 Annual Report

	Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2024 Program Total				
		Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Installations	Costs	Cost/ Unit	Cost/ Household
		Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
Dwellings	Each	160,717	99%	12,921	100%	\$ 7,720,111	68%	1,165	1%	-	0%	\$ 3,699,060	32%	161,882	12,921	\$ 11,419,171	\$ 70.54	\$ 884
Appliances																		
High Efficiency Clothes Washer	Each	175	100%	175	100%	\$ 179,326	100%	-	0%	-	0%	-	0%	175	175	\$ 179,326	\$ 1,024.72	\$ 1,025
Refrigerator	Each	823	100%	752	100%	\$ 1,056,213	100%	-	0%	-	0%	-	0%	823	752	\$ 1,056,213	\$ 1,283.37	\$ 1,405
Microwave	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
New - Clothes Dryer	Each	118	100%	118	100%	\$ 143,379	100%	-	0%	-	0%	-	0%	118	118	\$ 143,379	\$ 1,215.08	\$ 1,215
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	7,161	100%	2,793	100%	\$ 342,761	100%	-	0%	-	0%	\$ -	0%	7,161	2,793	\$ 342,761	\$ 47.86	\$ 123
Water Heater Repair/Replacement	Home	1	0%	1	0%	\$ 76	0%	330	100%	330	100%	\$ 1,000,862	100%	331	331	\$ 1,000,938	\$ 3,023.98	\$ 3,024
Water Heater Tank and Pipe Insulation	Home	191	100%	191	100%	\$ 20,827	100%	-	0%	-	0%	\$ -	0%	191	191	\$ 20,827	\$ 109.04	\$ 109
New - Heat Pump Water Heater	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - Tub Diverter/ Tub Spout	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - Thermostat-controlled Shower Valve	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Water Heater Repair/Replacement Inspection	Each	313	100%	269	100%	\$ 39,125	100%	-	0%	-	0%	\$ -	0%	313	269	\$ 39,125	\$ 125.00	\$ 145
Combined Showerhead / TSV	Each	14	100%	12	100%	\$ 1,170	100%	-	0%	-	0%	\$ -	0%	93,488	112	\$ 138,362	\$ 1.48	\$ 1,235
Enclosure																		
Air Sealing	Home	3,058	100%	3,058	100%	\$ 1,457,951	100%	-	0%	-	0%	\$ -	0%	3,058	3,058	\$ 1,457,951	\$ 476.77	\$ 477
Attic Insulation	Home	93,488	100%	112	100%	\$ 138,362	100%	-	0%	-	0%	\$ -	0%	112	112	\$ 138,362	\$ 1,235.38	\$ 1,235
HVAC																		
FAU Standing Pilot Conversion	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Furnace Repair/Replacement	Each	321	33%	321	33%	\$ 11,883	0%	645	67%	645	67%	\$ 2,589,482	100%	966	966	\$ 2,601,365	\$ 2,692.92	\$ 2,693
Room A/C Replacement	Each	-	0%	-	0%	\$ -	0%	65	100%	58	100%	\$ 75,696	100%	65	58	\$ 75,696	\$ 1,164.55	\$ 1,305
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%	-	-	\$ -	\$ -	\$ -
New - Energy Efficient Fan Control	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - Prescriptive Duct Sealing	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - Smart Thermostat	Home	344	73%	344	73%	\$ 92,855	74%	125	27%	125	27%	\$ 33,020	26%	469	469	\$ 125,875	\$ 268.39	\$ 268
CAM - HEAT Pump Split System	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Portable A/C	Home	1	100%	1	100%	\$ 685	100%	-	0%	-	0%	\$ -	0%	1	1	\$ 685	\$ 684.57	\$ 685
Furnace Repair/Replacement Inspection	Home	544	100%	544	100%	\$ 80,875	100%	-	0%	-	0%	\$ -	0%	544	544	\$ 80,875	\$ 148.67	\$ 149
New - A/C Time Delay	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
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 Torchiers	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - LED A-Lamps	Each	27,380	100%	5,030	100%	\$ 323,632	100%	-	0%	-	0%	\$ -	0%	27,380	5,030	\$ 323,632	\$ 11.82	\$ 64
New - LED R/BB Lamps	Each	3,907	100%	726	100%	\$ 67,786	100%	-	0%	-	0%	\$ -	0%	3,907	726	\$ 67,786	\$ 17.35	\$ 93
CAM - Exterior LED Lighting	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
CAM - Exterior LED Lighting - Pool	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Exterior LED Lighting - Spa	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
CAM - Interior LED Fixture	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
CAM - Interior LED Lighting	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
CAM - Interior LED Screw-in	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
CAM - Interior TLED Type A Lamps	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
CAM - Interior TLED Type C Lamps	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
CAM - Interior LED Exit Sign	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Miscellaneous																		
Smart Power Strips - Tier I	Each	396	100%	355	100%	\$ 23,550	100%	-	0%	-	0%	\$ -	0%	396	355	\$ 23,550	\$ 59.47	\$ 66
Smart Strip Tier II	Each	600	100%	533	100%	\$ 50,172	100%	-	0%	-	0%	\$ -	0%	600	533	\$ 50,172	\$ 83.62	\$ 94
Variable Speed Pool Pump	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Air Purifier	Each	1,248	100%	1,248	100%	\$ 693,726	100%	-	0%	-	0%	\$ -	0%	1,248	1,248	\$ 693,726	\$ 555.87	\$ 556
Ancillary Services																		
Commissioning	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Audit	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Administration	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Customer Enrollment																		
ESA In-Home Energy Education	Home	7,712	100%	7,712	100%	221,229	100%	-	0%	-	0%	\$ -	0%	7,712	7,712	\$ 221,229	\$ 28.69	\$ 29
ESA Outreach & Assessment	Home	12,921	100%	12,921	100%	2,774,529	100%	-	0%	-	0%	\$ -	0%	12,921	12,921	\$ 2,774,529	\$ 214.73	\$ 215

¹ Summary data which includes ESA Main Program (SF, MH), MFWB, Pilot Plus and Pilot Deep.

San Diego Gas & Electric Company
ESA Table 7 - ESA Expenditures Recorded by Cost Element
Program Year 2024 Annual Report

ESA Program:	Labor	Non-Labor	Contractor	Total
Energy Efficiency				
ESA Main Program (SF, MH) ¹				
Appliances			\$ 1,378,918	\$ 1,378,918
Domestic Hot Water			\$ 1,404,821	\$ 1,404,821
Enclosure			\$ 1,596,313	\$ 1,596,313
HVAC			\$ 2,884,496	\$ 2,884,496
Maintenance			\$ -	\$ -
Lighting			\$ 391,418	\$ 391,418
Miscellaneous			\$ 767,448	\$ 767,448
Customer Enrollment			\$ 2,774,500	\$ 2,774,500
In Home Education			\$ 221,257	\$ 221,257
Implementer Compensation			\$ 961,328	\$ 961,328
Multi-Family Whole Building (in-unit & WB/CAM) ²				
Appliances			\$ 268,545	\$ 268,545
Domestic Hot Water			\$ 215,109	\$ 215,109
Enclosure			\$ 33,114	\$ 33,114
HVAC			\$ 129,709	\$ 129,709
Maintenance			\$ 83	\$ 83
Lighting			\$ 70,614	\$ 70,614
Miscellaneous			\$ 409,549	\$ 409,549
Electrification			\$ 5,298	\$ 5,298
Customer Enrollment			\$ 305,462	\$ 305,462
In Home Education			\$ 114,174	\$ 114,174
Ancillary Servcies			\$ 1,115,869	\$ 1,115,869
Pilot Plus and Pilot Deep ³				
Appliances			\$ -	\$ -
Domestic Hot Water			\$ 2,744	\$ 2,744
Enclosure			\$ 9,135	\$ 9,135
HVAC			\$ 10,413	\$ 10,413
Maintenance			\$ 446	\$ 446
Lighting			\$ -	\$ -
Miscellaneous			\$ 10,246	\$ 10,246
Customer Enrollment			\$ 5,794	\$ 5,794
In Home Education			\$ 2,938	\$ 2,938
Implementer Compensation				\$ -
Building Electrification (SCE Only)				
Clean Energy Homes (SCE Only)				
CSD Leveraging				
Energy Efficiency TOTAL	\$ -	\$ -	\$ 15,089,740	\$ 15,089,740
Training Center				\$ -
Workforce Education and Training				\$ -
Inspections	\$ 162,421	\$ 18		\$ 162,439
Marketing and Outreach	\$ 211,154	\$ 1,175,208		\$ 1,386,362
Statewide Marketing Education and Outreach				\$ -
Measurement and Evaluation Studies		\$ 28,549		\$ 28,549
Regulatory Compliance	\$ 188,052	\$ 22,420		\$ 210,472
General Administration	\$ 887,831	\$ 640,863		\$ 1,528,694
CPUC Energy Division		\$ 2,892		\$ 2,892
Multifamily Whole Building ⁴	\$ 148,308	\$ 163,200	\$ 63,623	\$ 375,130
Pilot Plus and Pilot Deep ⁴	\$ 218,981	\$ 542,141	\$ 3,574	\$ 764,695
SPOC	\$ 51,301	\$ 232,729		\$ 284,029
TOTAL PROGRAM COSTS	\$ 1,868,047	\$ 2,808,019	\$ 15,156,937	\$ 19,833,002

¹ Refer to ESA Table 2 Main for the 2024 completed & expensed installation measures of \$11,419,171.

² Refer to ESA Table 2A-2 MFWB-SDG&E for the 2024 completed & expensed installation measures of \$2,667,525.

³ Refer to ESA Table 2B PP PD for the 2024 completed & expensed installation measures of \$41,715.

⁴ The "below the line" program costs includes contractor payments for non-measure costs for ESA MFWB (SDG&E only) and Pilot Plus and Pilot Deep programs.

San Diego Gas & Electric Company
ESA Table 8 - ESA Homes Unwilling / Unable to Participate ¹
Program Year 2024 Annual Report

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	6,770	16,606	-	-	4,486	186	2,193
ORANGE	7	7	-	-	1	-	-
Total	6,777	16,613	-	-	4,487	186	2,193

¹ Summary data which includes ESA Main Program (SF, MH) participants only

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	Customer Unwilling/Declined Program Measures	# of Customer Unavailable - Scheduling Conflicts	# of Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	# of Other Infeasible/ Ineligible
Total	-	-	-	-	-

**ESA Table 9 - ESA Building Electrification (SCE Only) Life Cycle Bill Savings by Measure
San Diego Gas & Electric Company
Program Year 2024 Annual Report**

Residential Energy Rate Used for Bill Savings Calculations				Non-Residential Energy Rate Used for Bill Savings Calculations (MFWB)		
Year	\$/kWh	\$/Therm		Year	\$/kWh	\$/Therm
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		
2048				2048		

ESA Table 10A-10D - ESA Bill Savings Calculations
San Diego Gas & Electric Company
Program Year 2024 Annual Report

ESA Table 10A				
Bill Savings Calculations by Program Year (ESA Main - SF, MH) ¹				
Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
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	\$ 577,658	0.04	\$ 127
2024	\$ 15,699,907	\$ 4,759,376	0.30	\$ 743

¹ ESA Main in 2024 includes Single Family and Mobile Home treatments only. In-Unit treatments occurred in ESA MFWB program.

ESA Table 10C					
Bill Savings Calculations by Program Year - MFWB (In-Unit and CAM) ^{1,2}					
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
2012					
2013					
2014					
2015					
2016					
2017					
2018					
2019					
2020					
2021					
2022					
2023					
2024	\$ 3,326,685	\$ 1,696,847	0.51	\$ 480	\$ 58,873

¹ ESA MFWB in 2024 includes In-Unit treatments

² Data includes ESA MFWB. SDG&E ESA MFWB did not incur any enrollment costs or savings until Program Year 2024

Note: Clean Energy Homes is not applicable.

ESA Table 10B				
Bill Savings Calculations by Program Year (Pilot Plus and Pilot Deep) ¹				
Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022				
2023				
2024	\$ 806,411	\$ 3,300	0.004	\$ 1,650

¹ Data for program years prior to 2022 is not applicable as program not authorized until D.21-06-015. SDG&E ESA Pilot Plus and Pilot Deep did not incur any enrollment costs or savings until Program Year 2024

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
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022				
2023				
2024				

Note: Data for program years prior to 2022 is not applicable as program not authorized until D.21-06-015. SDG&E has no activity to report for ESA Building Electrification.

ESA Table 11 - ESA Fund Shifting
San Diego Gas & Electric
Program Year 2024 Annual Report

[illegible]

⁹ Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 20.1 of D.08-11-031 as modified by D.10-10-008, 16-11-022, D.17-12-009, and D.21-06-015. In D.21-06-015 OP 181, the Commission revised the fund shift rules allowing flexibility to shift funds between the categories and fuel/commodity type.

² ESA Portfolio budget as authorized in D.21-06-015, Attachment 1, Table 11, unless otherwise specified.

³Total unspent funds are based on authorized budgets less expenditures. The unspent amount is not the same as the amounts (over/under collection) in the Balancing Accounts which are based on the annual collections from ratepayers minus the annual expenditures and plus or minus interest expense.

² Authorized budget of \$9,014,088 per D-21-06-015, Attachment 2, Table 11. In accordance with D-21-06-015, OP 181, MFWR funds not expended in previous program years will be available to the MFWR program within the 2022-2026 program cycle. As of the end of program year 2023, the cumulative unspent funds available totaled \$5,626,078, which includes \$367,063 unspent funds from Multi-Family In-Unit from 2023 program year.

¹Consistent with OP 12 of D-11-001-022, any remaining unspent and unencumbered SASHMASH program funds should be used for measures in low income energy efficiency programs in residential housing that benefit renters. SDG&E, AL 4282-E, regarding transfer of unspent SASHMASH funds to the ESA programs became effective 12/1/2012.

Consistent with OP 12 of U-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 employers. MURRAY'S AL. 4285-1, requesting transfer of unspent SASH/MASH funds to the ESA programs 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.

Note: The supplemental table below shows the cumulative unspent and overcollected funds available in the electric and gas balancing accounts that are committed to the current program cycle or will be used to offset future ESA program revenue collections in accordance with D.21-06-015.

	Electricity	Gas	Total
Total Unspent/Over-collected funds available in balancing account as of December 31, 2024	\$1,833,800	\$2,229,994	\$4,063,794
Total ES&S AMPR cumulative net funding as of the end of the program years 2021 to 2024 to 2024 to ES&S and SC&G	\$5,157,034	\$5,174,045	\$10,331,079
ES&S: Authorization of pre-2025 over-collections/program funds included in 2025 PPR rates	\$1,000,000	\$0	\$1,000,000
Total Estimated unspent committed contracted funds for ES&S Main program year 2024 ¹	\$1,028,442	\$0	\$1,028,442
Total Estimated unspent committed contracted funds for ES&S Pilot program year 2024 ²	\$5,758,262	\$5,758,262	\$11,516,524
Total Estimated unspent committed contracted funds for ES&S Pilot and ES&S Main program year 2024 ³	\$1,177,550	\$1,099,555	\$2,277,105
Total ES&S/AMPR unspent committed funds for ES&S Main as of December 31, 2024 ⁴	\$1,153,260	\$0	\$1,153,260
Total Unspent/Uncommitted/Over-collected (Under-collected) Funds Available to Offset Future Revenue Collections as of the end of the program year	\$5,807,449	\$1,928,231	\$7,735,680

³ In D-21-06-015, the Commission directs the Investor-Owned Utilities (IOUs) to use unspent ESA Program funds to achieve program and policy objectives and to offset future revenue collections. Consistent with this directive, SDG&E will partially offset its 2025 electric collections by \$1,000,000, utilizing pre-2025 unspent and uncommitted funds. See SDG&E Advice Letter 4504-E, effective January 1, 2025.

³ SDG&E defines commitments per D.17-09-022, OP 131, which stated “For the purposes of this Decision, the term “committed funds” is defined 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.”

ESA Table 12A-12C - ESA Categorical and Other Enrollment
San Diego Gas & Electric Company
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ESA Table 12A ESA Main (SF, MH)¹	
Type of Enrollment	Number of Homes Treated
Women, Infants, and Children Program (WIC)	13
Supplemental Security Income (SSI)	13
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	23
CalWORKs/Temporary Assistance for Needy Families (TANF)	1
Tribal TANF	-
Medicaid/Medi-Cal for Families	36
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	3
80/20 Rule ²	-
Targeted Self Certification	47
Standard Enrollment	10
Total	147

ESA Table 12B ESA Pilot Plus and Pilot Deep³	
Type of Enrollment	Number of Homes Treated
Women, Infants, and Children Program (WIC)	-
Supplemental Security Income (SSI)	-
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	1
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	1
Total	2

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)

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 Summary data which includes ESA Pilot Plus and Pilot Deep

Note: Categorical enrollment is not applicable to MFWB or Clean Energy Homes.

San Diego Gas & Electric Company
ESA Table 13A - ESA Leveraging & Integration¹
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ESA Table 13A-1 ESA Main (SF, MH) [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 preform 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 water saving measures for ESA participants.	Yes	Yes	N/A	N/A	Unknown	N/A	Total rebate amount received from SDCWA in 2024.	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: 11,158 kW: 2 Therms: 624	N/A	138	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: 42,313 kW: 6 Therms: 906	N/A	357	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 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	kWh: 66,766 kW: 9 Therms: 1,105	N/A	3	N/A	N/A	N/A
RZNET	For properties not eligible/interested in MFWB, referral to RZNET is made. RZNET refers properties that may also benefit from additional measures in MFWB.	Yes	No	N/A	N/A	N/A	0	N/A	N/A	N/A
SDCWA	Partnership to leverage water saving measures for ESA participants.	Yes	No	N/A	N/A	N/A	0	N/A	N/A	N/A
PYD	For properties interested in clean transportation, referral to PYD is made.	No	No	N/A	N/A	N/A	0	N/A	N/A	N/A
OBF	For properties interested in financing, referral to OBF is made.	No	No	N/A	N/A	N/A	0	N/A	N/A	N/A
GoGreen Financing	For properties interested in financing, referral to GoGreen Financing is made.	Yes	No	N/A	N/A	N/A	0	N/A	N/A	N/A
TECH Clean California	For properties interested in HPWH, referral to TECH Clean California is made.	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
N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

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), MFWB, Building Electrification.

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 2024. 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 Information on methodology used to calculate cost and/or resource savings.

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

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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.	1	0	0	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	32	0
SDCWA	SDG&E efforts to coordinate program information with SDCWA.	N/A	1	1	N/A	N/A
CARE/Medical Baseline	CARE Online Enrollments are leveraged for ESA Program Enrollments.	N/A	N/A	N/A	N/A	N/A
CARE High Usage	Leads generated through CARE HEU income verifications completed	N/A	N/A	N/A	726	313
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	17	211	N/A	N/A
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	3	41	2,589	67
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	N/A
MFWB ⁷	Coordination with SDG&E in their Administration of the Southern Section MFWB program	72	4	19	36	3

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 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

Note: N/A identifies areas where SDG&E is unable to track the data related with these efforts.

San Diego Gas & Electric Company
ESA Table 14 - ESA Expenditures for Pilots and Studies
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	Authorized 2021-2026 Funding			2024 Expenses			Cycle to Date Expenses			% of Budget Expensed		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots												
Virtual Energy Coach (PG&E only)												
Total Pilots	\$ -	\$ -	\$ -				\$ -	\$ -	\$ -	0%	0%	0%
Studies ^{1,2}												
2022 Low Income Needs Assessment Study	\$ 18,750	\$ 18,750	\$ 37,500	\$ -	\$ -	\$ -	\$ 18,725	\$ 18,725	\$ 37,450	100%	100%	100%
2025 Low Income Needs Assessment Study	\$ 18,750	\$ 18,750	\$ 37,500	\$ 7,008	\$ 7,008	\$ 14,015	\$ 7,008	\$ 7,008	\$ 14,015	37%	37%	37%
2028 Low Income Needs Assessment Study	\$ 18,750	\$ 18,750	\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Statewide CARE-ESA Categorical Study	\$ 5,625	\$ 5,625	\$ 11,250	\$ -	\$ -	\$ -	\$ 5,584	\$ 5,584	\$ 11,168	99%	99%	99%
Energy Impact Evaluation	\$ 112,500	\$ 112,500	\$ 225,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Non-Energy Impact Study	\$ 37,500	\$ 37,500	\$ 75,000	\$ 7,267	\$ 7,267	\$ 14,534	\$ 7,267	\$ 7,267	\$ 14,534	19%	19%	19%
Multifamily Common Area Measure Process Evaluation	\$ 37,500	\$ 37,500	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Rapid Feedback Research and Analysis	\$ 150,000	\$ 150,000	\$ 300,000	\$ -	\$ -	\$ -	\$ 37,813	\$ 37,813	\$ 75,626	25%	25%	25%
Total Studies	\$ 399,375	\$ 399,375	\$ 798,750	\$ 14,275	\$ 14,275	\$ 28,550	\$ 76,397	\$ 76,397	\$ 152,794	19%	19%	19%

¹ Authorized per D.21-06-015. Funds for pilots and studies may be rolled over to the next program year or borrowed from a future program year within the cycle, to allow for flexibility in scheduling changes with these efforts. Funding amounts listed reflect SDG&E's 15% allocation among the IOUs.

² Some studies are carried over from previous program cycles and the information contained reflect the approved authorized study spend.

San Diego Gas & Electric Company
ESA Table 15 - ESA Tribal Outreach
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OUTREACH STATUS	Quantity (Includes CARE, FERA, and ESA) ²	List of Participating Tribes
Tribes completed ESA Meet & Confer ¹	9	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, Los Coyotes Band of Cahuilla and Cupeno Indians
Tribes requested outreach materials or applications	8	Pauma Band of Mission Indians, La Posta Band of Mission Indians, Mesa Grande Band of Mission Indians, Iipay Nation Santa Ysabel, Campo Kumeyaay Nation, Manzanita Band of Kumeyaay Nation, La Jolla Band of Luiseno Indians, Los Coyotes Band of Cahuilla and Cupeno Indians
Tribes who have not accepted offer to Meet and Confer	3	Ewiiapaayp, Inaja Cosmit Band of Indians ³ , 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) ⁴
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 invited all 17 tribes to meet in 2024.

² Numbers are a rolling count of Tribal Outreach efforts

³ SDG&E does not provide service to Inaja & Cosmit

⁴ SDG&E provides TANF related messaging through periodic presentations to SCAIR and SCTCA

San Diego Gas & Electric Company
ESA Table 16A-16E - ESA Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions
Program Year 2024 Annual Report

ESA Table 16A ESA Main (SF, MH)													
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	5611	3%	6564	85%	145.9437895	-21.73506676	0.022594684	6.064995806	-3.783480323	1180.831219	-0.000768826	-0.006021522
MH	22468	795	4%	1183	67%	29.01934818	0	0.008043566	-0.165622657	0	1307.984846	0	0
MF In-Unit	179480	0	0%	114	0%	0	0	0	0	0	0	0	0
Rent vs. Own													
Own	136885	2585	2%	84599	3%	158.0634388	124.0376739	0.027255207	7.543493164	4.606768643	1714.458524	0.199243154	0.047403689
Rent	236613	3821	2%	22998	17%	129.6827541	94.3342828	0.012834034	2.786318928	2.792001428	653.8793894	0.033777256	0.019849145
Previous vs. New Participant			0%		0%								
Previous ¹¹	N/A	4030	N/A	70554	6%	129.6827541	111.7174862	0.02108843	5.65630184	3.978361781	1262.083452	0.08780052	0.036632157
New Participant	13760	2376	17%	80220	3%	125.8124257	106.9644919	0.019285728	4.618097197	3.310197961	1125.330319	0.177940121	0.027211345
Seniors ⁶	166246.3086	1777	1%	N/A	N/A	137.3525028	109.986047	0.022614146	5.788922354	3.446636338	1471.123685	0.181318544	0.029390095
Veterans	44771.0778	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	6348	N/A	N/A	N/A	127.0184696	108.8163304	0.020348635	5.24075714	3.702951582	1206.045256	0.110667235	0.032480348
Vulnerable ⁸	160975	1918	1%	31353	6%	96.84854981	83.8344282	0.014627646	4.113112287	2.924388497	1057.657121	0.061849026	0.026656885
Location													
DAC	90092	1269	1%	18463	7%	100.6002873	89.30450734	0.014485505	4.212058094	3.149757288	1071.783017	0.068769807	0.023181956
Rural	8611	177	2%	3520	5%	144.8215184	113.4465404	0.027796875	3.627067361	2.104732281	1188.56875	0.114569084	0.012027499
Tribal ¹⁸	21716	3	0%	241	1%	168.3744444	168.3744444	0.022244444	0	0	753.0611111	0.035536602	
PSPS Zone	131968	43	0%	2195	2%	150.5184706	135.5550602	0.024729412	1.705865882	0.638537349	1012.051765	0.058534996	0.020744178
Wildfire Zone 9	63552	405	1%	14901	3%	174.3022781	155.3283218	0.029265571	4.009666041	2.77706041	1160.761252	0.084457824	0.022807726
Climate Zone 6	16775	1	0%	4637	0%	531.2333333	531.2333333	0.066833333	0	0	1591.793333	0.168408093	N/A
Climate Zone 7	244028	4172	2%	104227	4%	123.3043093	108.4324986	0.018340868	5.790453923	4.168028478	1227.545964	0.13630287	0.038221745
Climate Zone 8	4649	1	0%	1481	0%	982	982	0.1178	0	0	2954.54	0.120609187	N/A
Climate Zone 10	99636	2214	2%	44945	5%	136.2006427	111.3399404	0.0243122	4.457319809	3.007442055	1198.360595	0.081838626	0.023494343
Climate Zone 14	3490	13	0%	840	2%	203.73	203.73	0.030109091	-0.026545455	-0.026545455	801.5109091	0.0152705	N/A
Climate Zone 15	1084	5	0%	201	2%	306.8072727	306.8072727	0.040945455	2.167272727	2.167272727	887.4181818	0.061125746	0.205517241
CARB Communities ¹⁰	293478	820	0%	13053	6%	90.2800437	84.37270266	0.011495025	3.620208458	2.750739286	984.2213267	0.077920493	0.020441438
Financial													
CARE	289930	5858	2%	145220	4%	131.5759533	114.6720071	0.020984752	5.45296071	4.019318017	1201.42299	0.111933829	0.033488673
FERA	41374	101	0%	8629	1%	109.4777695	99.27863636	0.013846753	5.863798052	4.111502597	1150.702922	0.038311803	0.023194359
Disconnected	N/A	0	N/A	0	0%	0	0	0	0	0	0	0	0
Arrearages ¹²	746647	2386	0%	51335	5%	120.8778029	109.1216637	0.018143658	4.647284837	3.679656953	1011.636874	0.076647163	0.023922549
High Usage ¹³	167633	600	0%	9913	6%	162.6460555	150.4999681	0.025075672	5.045126528	4.225463681	1090.691345	0.016109539	0.020780633
High Energy Burden ¹⁴	132033	1190	1%	18162	7%	112.0555199	101.3499715	0.016369487	4.430176365	3.465031544	1024.835655	0.075369732	0.04593114
SEVI ¹⁵													
Low	275414	880	0%	36497	2%	183.5619996	163.0874732	0.030076085	6.100749048	4.540726646	1350.456428	0.32859659	0.036187606
Medium	318131	2000	1%	58215	3%	136.2581863	113.2882779	0.022562632	5.904951517	4.058360133	1316.0303	0.076789839	0.032510199
High	243149	3406	1%	60701	6%	110.5480028	95.66476175	0.016948562	4.807948462	3.418802058	1127.815114	0.087718157	0.034184146
Affordability Ratio ¹⁶	35421	588	2%	12406	5%	108.2398479	101.7617487	0.015259767	5.298430401	4.368211269	989.7716688	0.051936657	0.048149352
Health Condition													
Medical Baseline	20925	528	3%	7978	7%	156.6880085	137.7924356	0.025661975	6.366405309	4.350182178	1511.520111	0.066369154	0.031332534
Respiratory ¹⁷													
Low	283333	2007	1%	70501	3%	158.70108	135.6074751	0.025849609	5.958639211	4.192583497	1318.756907	0.195494508	0.03302456
Medium	195497	2266	1%	49459	5%	120.6363671	101.1346436	0.019725878	4.869837558	3.278463018	1190.462467	0.08595603	0.030705903
High	113025	2096	2%	35453	6%	108.4406352	96.293826	0.016291917	5.234876938	3.910063248	1152.732712	0.074025787	0.038235975
Disabled	115906.848	357	0%	N/A	N/A	179.216406	152.5558824	0.030294128	6.805288601	3.987787543	1698.983316	0.102379833	0.048945976

ESA Table 16B ESA MFWB Whole Building - Common Area													
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) ¹⁹	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms) ¹⁹
Demographic													
Housing Type					0%								
SF					0%								
MH					0%								
MF In-Unit					0%								
Rent vs. Own					0%								
Own					0%								
Rent					0%								
Previous vs. New Participant					0%								
Previous ¹¹					0%								
New Participant					0%								
Seniors ⁶					0%								
Veterans													
Hard-to-Reach ⁷		N/A			0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Vulnerable ⁸		3			0%	182.07	80.33	0.04	2296.46	2297.12	50446.180	N/A	N/A
Location		0			0%	0	0	0	0	0	0.000	N/A	N/A
DAC		3			0%	182.07	80.33	0.04	2296.46	2297.12	50446.180	N/A	N/A
Rural		0			0%	0	0	0	0	0	0.000	N/A	N/A
Tribal ¹⁸		0			0%	0	0	0	0	0	0.000	N/A	N/A
PSPS Zone		0			0%	0	0	0	0	0	0.000	N/A	N/A
Wildfire Zone ⁹		0			0%	0	0	0	0	0	0.000	N/A	N/A
Climate Zone 6		0			0%	0	0	0	0	0	0.000	N/A	N/A
Climate Zone 7		0			0%	0	0	0	0	0	0.000	N/A	N/A
Climate Zone 8		0			0%	0	0	0	0	0	0.000	N/A	N/A
Climate Zone 10		3			0%	182.07	80.33	0.04	2296.46	2297.12	50446.180	N/A	N/A
Climate Zone 14													
Climate Zone ¹⁵					0%								
CARB Communities ¹⁰					0%								
Financial					0%								
CARE					0%								
FERA													
Disconnected					0%								
Arrearages ¹²					0%								
High Usage ¹³					0%								
High Energy Burden ¹⁴		2			0%	0	0	0	3,435	3,435	67,383.11	N/A	N/A
SEVI ¹⁵		0			0%	0	0	0	0	0	0.00	N/A	N/A
Low												N/A	N/A
Medium		0			0%	0	0	0	0	0	0.00	N/A	N/A
High		3			0%	182	80	0	2,296	2,297	50,446.18	N/A	N/A
Affordability Ratio ¹⁶		0			0%	0	0	0	0	0	16,572.32	N/A	N/A
Health Condition		0			0%	0	0	0	0	0	0.00	N/A	N/A
Medical Baseline		0				0	0	0	0	0	0	N/A	N/A
Respiratory ¹⁷		0			0%	0	0	0	0	0	0.00	N/A	N/A
Low		0			0%	0	0	0	0	0	0.00	N/A	N/A
Medium		0			0%	0	0	0	0	0	0.00	N/A	N/A
High		3			0%	182	80	0	2,296	2,297	50,446.18	N/A	N/A
Disabled		0			0%	0	0	0	0	0	0	N/A	N/A

ESA Table 16C MFWB (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) ¹⁹	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms) ¹⁹
Rent vs. Own													
Own		66.00				849.36	523.71	0.09	27.10	27.76	4,064.80	N/A	N/A
Rent		3,102.00				902.59	461.36	0.08	34.29	35.60	2,737.10	N/A	N/A
Previous vs. New Participant													
Previous ¹¹		3,168.00				901.53	462.60	0.08	34.15	35.45	2,763.51	N/A	N/A
New Participant		-				-	-	-	-	-	-	N/A	N/A
Seniors ⁶		1,526.00				691.99	455.84	0.08	15.67	16.35	1,947.33	N/A	N/A
Veterans		150.00				758.43	456.03	0.08	30.34	32.01	2,222.82	N/A	N/A
Hard-to-Reach ⁷	N/A				N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A
Vulnerable ⁸		1,360.00				879.76	442.75	0.08	34.76	35.97	2,752.17	N/A	N/A
Location													
DAC		916.00				850.88	449.49	0.09	27.14	27.89	2,449.31	N/A	N/A
Rural		-				-	-	-	-	-	-	N/A	N/A
Tribal ¹⁸		-				-	-	-	-	-	-	N/A	N/A
PSPS Zone		1.00				139.68	-	0.02	(2.66)	-	3,780.72	N/A	N/A
Wildfire Zone ⁹		308.00				595.57	429.85	0.09	3.17	3.92	2,011.93	N/A	N/A
Climate Zone 6		-				-	-	-	-	-	-	N/A	N/A
Climate Zone 7		-				-	-	-	-	-	-	N/A	N/A
Climate Zone 8		-				-	-	-	-	-	-	N/A	N/A
Climate Zone 10		939.00				1,252.19	632.14	0.09	62.98	65.53	3,937.84	N/A	N/A
Climate Zone 14		-				-	-	-	-	-	-	N/A	N/A
Climate Zone 15		-				-	-	-	-	-	-	N/A	N/A
CARB Communities ¹⁰		719.00				591.13	173.32	0.04	27.74	28.61	2,253.51	N/A	N/A
Financial													
CARE		-				-	-	-	-	-	-	N/A	N/A
FERA		-				-	-	-	-	-	-	N/A	N/A
Disconnected		-				-	-	-	-	-	-	N/A	N/A
Arrearages ¹²		-				-	-	-	-	-	-	N/A	N/A
High Usage ¹³		-				-	-	-	-	-	-	N/A	N/A
High Energy Burden ¹⁴		327.00				827.47	391.76	0.07	76.64	78.38	3,602.72	N/A	N/A
SEVI ¹⁵		-				-	-	-	-	-	-	N/A	N/A
Low		419.00				689.26	304.68	0.04	6.31	7.02	2,749.19	N/A	N/A
Medium		928.00				552.91	270.39	0.05	17.44	18.49	1,893.47	N/A	N/A
High		1,753.00				1,161.05	613.69	0.11	50.23	51.82	3,299.94	N/A	N/A
Affordability Ratio ¹⁶		-				-	-	-	-	-	-	N/A	N/A
Health Condition													
Medical Baseline		146.00				1,156.31	714.07	0.12	36.13	37.04	3,309.05	N/A	N/A
Respiratory ¹⁷		-				-	-	-	-	-	-	N/A	N/A
Low		1,340.00				767.72	379.56	0.07	40.73	42.56	2,744.33	N/A	N/A
Medium		737.00				1,290.05	647.41	0.10	22.25	23.46	3,463.65	N/A	N/A
High		1,025.00				839.60	460.20	0.09	35.94	36.67	2,419.92	N/A	N/A
Disabled		-				-	-	-	-	-	-	N/A	N/A

<div>ESA Table 16D</div> <div>Pilot Plus and Pilot Deep</div>													
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	N/A		0%	N/A	0%								
SF	N/A	2	0%	N/A	0%	418.77	169.25	0.07	14.03	17.18	17357.56	0.04	0.04
MH	N/A	0	0%	N/A	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MF In-Unit	N/A	0	0%	N/A	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Rent vs. Own	N/A	0	0%	N/A	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Own	N/A	1	0%	N/A	0%	332.42	316.36	0.14	11.66	11.67	8008.26	0.03	0.03
Rent	N/A	1	0%	N/A	0%	505.13	22.14	0.01	16.40	22.68	26706.86	0.06	0.04
Previous vs. New Participant	N/A	0	0%	N/A	0%								
Previous ¹¹	N/A	0	0%	N/A	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
New Participant	N/A	2	0%	N/A	0%	418.77	169.25	0.07	14.03	17.18	17357.56	0.04	0.04
Seniors ⁶	N/A	0	0%	N/A	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Veterans	N/A	0	0%	N/A	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Hard-to-Reach ⁷	N/A	0	0%	N/A	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Vulnerable ⁸	N/A	0	0%	N/A	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Location													
DAC	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Rural	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Tribal ¹⁸	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
PSPS Zone	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Wildfire Zone ⁹	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Climate Zone 6	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Climate Zone 7	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Climate Zone 8	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Climate Zone 10	N/A	2	0%	N/A	0%	418.7735279	169.248	0.0748	14.0278523	17.1767	17357.56	0.044954843	0.035461127
Climate Zone 14	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Climate Zone 15	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
CARB Communities ¹⁰	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Financial													
CARE	N/A	2	0%	N/A	0%	418.7735279	169.248	0.0748	14.0278523	17.1767	17357.56	0.044954843	0.035461127
FERA	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Disconnected	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Arrearages ¹²	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
High Usage ¹³	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
High Energy Burden ¹⁴	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
SEVI ¹⁵	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Low	N/A	1	0%	N/A	0%	332.416	316.356	0.1405	11.6556	11.6724	8008.26	0.032961428	0.029507848
Medium	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
High	N/A	1	0%	N/A	0%	505.1310557	22.14	0.0091	16.4001046	22.681	26706.86	0.056948259	0.041414406
Affordability Ratio ¹⁶	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Health Condition													
Medical Baseline	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Respiratory ¹⁷	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Low	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0
Medium	N/A	1	0%	N/A	0%	332.416	316.356	0.1405	11.6556	11.6724	8008.26	0.032961428	0.029507848
High	N/A	1	0%	N/A	0%	505.1310557	22.14	0.0091	16.4001046	22.681	26706.86	0.056948259	0.041414406
Disabled	N/A	0	0%	N/A	0%	0	0	0	0	0	0	0	0

¹ 2024 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 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.

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 2023.

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 2024 (using 2019 base year) provided by the CPUC, SDG&E selects census tracts with Electric AR20 at 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; L: >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.

¹⁹ SDG&E could not identify sub-metered enrollments. Including sub-meter enrollments skews the savings to consumption ratios.

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. HH Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type			0%		0%								
SF			0%		0%								
MH			0%		0%								
MF In-Unit			0%		0%								
Rent vs. Own			0%		0%								
Own			0%		0%								
Rent			0%		0%								
Previous vs. New Participant			0%		0%								
Seniors			0%		0%								
Veterans			0%		0%								
Hard-to-Reach			0%		0%								
Vulnerable			0%		0%								
Location													
DAC			0%		0%								
Rural			0%		0%								
Tribal			0%		0%								
PSPS Zone			0%		0%								
Wildfire Zone			0%		0%								
Climate Zone 7 (example)			0%		0%								
Climate Zone 10 (example)			0%		0%								
Climate Zone 14 (example)			0%		0%								
Climate Zone 15 (example)			0%		0%								
CARB Communities			0%		0%								
Financial													
CARE			0%		0%								
Disconnected			0%		0%								
Arrearages			0%		0%								
High Usage			0%		0%								
High Energy Burden			0%		0%								
SEVI			0%		0%								
Affordability Ratio			0%		0%								
Health Condition													
Medical Baseline			0%		0%								
Respiratory			0%		0%								
Disabled			0%		0%								

San Diego Gas & Electric Company
CARE Table 1 - CARE Overall Program Expenses
Program Year 2024 Annual Report

Category	Overall Expenditures		Total	Authorized Budget ¹	% of Budget Spent	Total Shifted ²	Shifted to/from?
	Electric	Gas					
Outreach	\$ 2,244,554	\$ 277,424	\$ 2,521,978	\$ 2,521,978	100%	\$ (843,219)	Shifted to Processing, Certification, Recertification
Processing, Certification, Recertification	\$ 1,588,458	\$ 196,381	\$ 1,784,839	\$ 1,784,839	100%	\$ 1,149,298	Shifted \$843,219 from Outreach and \$306,079 from IT Programming
Post Enrollment Verification	\$ 109,932	\$ 13,587	\$ 123,519	\$ 493,699	25%		
IT Programming	\$ 359,000	\$ 45,011	\$ 404,011	\$ 831,921	49%	\$ (306,079)	Shifted to Processing, Certification, Recertification
CHANGES	\$ 235,850	\$ 29,150	\$ 265,000	\$ 265,000	100%		
Studies and Pilots	\$ 12,360	\$ 1,655	\$ 14,015	\$ 19,535	72%		
Measurement & Evaluation	\$ -	\$ -	\$ -	\$ -	0%		
Regulatory Compliance	\$ 222,034	\$ 27,442	\$ 249,476	\$ 327,798	76%		
General Administration	\$ 396,989	\$ 49,070	\$ 446,059	\$ 694,575	64%		
CPUC Energy Division	\$ 2,941	\$ 364	\$ 3,305	\$ 74,023	4%		
Total Program Costs	\$ 5,172,119	\$ 640,084	\$ 5,812,203	\$ 7,013,368	83%	\$ -	
CARE Rate Discount	\$ 192,309,684	\$ 20,131,750	\$ 212,441,434	\$ 124,031,180	171%	\$ -	
Service Establishment Charge Discount	\$ -	\$ -	\$ -	\$ -	0%	\$ -	
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 197,481,803	\$ 20,771,834	\$ 218,253,637	\$ 131,044,548	167%	\$ -	

¹ Reflects total authorized funding approved in D.21-06-015, Attachment 1, Table 2, adjusted for program year 2024 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.

San Diego Gas & Electric Company
CARE Table 2 - CARE Enrollment, Recertification, Attrition, & Penetration
Program Year 2024 Annual Report

	New Enrollment										Recertification					Attrition (Drop Offs)					Enrollment		Total CARE Participants by Dwelling Type			Total CARE Participants	Estimated CARE Eligible	Enrollment Rate % (W/X)
	Automatic Enrollment				Self-Certification (Income or Categorical)						Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)	Dwelling Type					
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)	SF													MF	MH				
January	15	64	23	102	6,188	401	435	181	7,205	7,307	6,025	3,296	839	10,160	4,558	7	572	1,893	7,030	17,467	277	192,377	93,050	8,630	337,096	289,930	116%	
February	18	62	28	108	5,046	433	451	138	6,068	6,176	4,355	2,594	988	7,937	4,169	7	420	2,761	7,357	14,113	-1,181	191,466	92,797	8,625	335,915	289,930	116%	
March	35	65	38	138	5,304	465	505	144	6,418	6,556	5,335	3,053	1,527	9,915	4,243	26	564	2,326	7,159	16,471	-603	191,283	92,344	8,440	335,312	289,930	116%	
April	19	75	288	382	4,166	390	289	151	4,966	5,348	6,182	2,569	712	9,463	4,696	27	533	2,346	7,662	14,811	-2,254	189,935	91,742	8,302	333,058	289,930	115%	
May	0	87	116	203	4,629	304	291	122	5,346	5,549	5,248	2,656	1,093	8,997	7,074	24	527	2,345	9,970	14,546	-4,421	187,183	90,398	8,190	328,637	289,930	113%	
June	25	5	41	71	4,460	337	368	150	5,315	5,386	6,841	2,289	943	10,073	6,021	22	568	3,263	9,874	15,459	-4,488	184,446	89,177	8,074	324,149	289,930	112%	
July	13	72	55	140	4,689	450	481	208	5,828	5,968	5,380	2,976	698	9,054	7,509	22	732	3,428	11,691	15,022	-5,723	181,312	87,594	7,573	318,426	289,930	110%	
August	18	77	38	133	6,201	528	754	221	7,704	7,837	6,261	3,847	795	10,903	5,368	41	678	2,932	9,019	18,740	-1,182	180,603	87,262	7,455	317,244	289,930	109%	
September	19	61	100	180	5,474	338	782	188	6,782	6,962	4,938	3,076	451	8,465	5,105	27	494	1,851	7,477	15,427	-515	180,407	87,238	7,252	316,729	289,930	109%	
October	18	39	50	107	4,116	296	423	162	4,997	5,104	4,404	2,570	522	7,496	6,476	22	410	2,061	8,369	12,600	-3,365	178,216	86,254	7,040	312,864	289,930	108%	
November	19	82	6	107	3,542	150	382	106	4,180	4,287	4,034	2,311	559	6,904	5,255	7	345	2,130	7,737	11,191	-3,450	176,217	85,223	6,944	309,414	289,930	107%	
December	17	83	4	104	4,050	206	488	168	4,912	5,016	4,431	2,529	411	7,371	6,331	1	395	1,801	8,528	12,387	-3,512	173,944	84,360	6,873	305,902	289,930	106%	
YTD Total	216	772	787	1,775	57,865	4,268	5,649	1,939	69,721	71,496	63,434	33,766	9,538	106,738	66,805	233	6,238	29,137	102,413	178,234	-30,917	173,944	84,360	6,873	305,902	289,930	106%	

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.

San Diego Gas & Electric Company
CARE Table 3A - 3D - CARE Post-Enrollment Verification Results
Program Year 2024 Annual Report

CARE Table 3A - Post-Enrollment Verification Results (Model) 2024										
Month	Total CARE Households Enrolled	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	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	337,096	2,170	0.64%	55.39%	6.68%	1,202	21	1,223	56%	0.36%
February	335,915	2,164	0.64%	57.62%	7.72%	1,247	26	1,273	59%	0.38%
March	335,312	2,179	0.65%	60.30%	7.94%	1,314	26	1,340	61%	0.40%
April	333,058	2,713	0.81%	58.46%	7.78%	1,586	24	1,610	59%	0.48%
May	328,637	2,269	0.69%	58.88%	6.39%	1,336	20	1,356	60%	0.41%
June	324,149	2,235	0.69%	57.18%	5.19%	1,278	26	1,304	58%	0.40%
July	318,426	3,233	1.02%	56.02%	5.78%	1,811	46	1,857	57%	0.58%
August	317,244	2,174	0.69%	54.19%	4.23%	1,178	31	1,209	56%	0.38%
September	316,729	1,120	0.35%	56.96%	3.57%	638	7	645	58%	0.20%
October	312,864	30	0.01%	60.00%	3.33%	18	0	18	60%	0.01%
November	309,414	16	0.01%	50.00%	0.00%	8	0	8	50%	0.00%
December	305,902	9	0.00%	33.33%	11.11%	3	0	3	33%	0.00%
YTD Total	305,902	20,312	6.64%	57.20%	6.29%	11,619	227	11,846	58%	3.87%

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.

CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage) 2024										
Month	Total CARE Households Enrolled	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	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	337,096	253	0.08%	54.94%	1.98%	139	2	141	56%	0.04%
February	335,915	277	0.08%	72.56%	4.69%	201	1	202	73%	0.06%
March	335,312	344	0.10%	68.31%	2.03%	235	3	238	69%	0.07%
April	333,058	265	0.08%	65.66%	2.26%	174	3	177	67%	0.05%
May	328,637	295	0.09%	69.49%	0.68%	205	7	212	72%	0.06%
June	324,149	247	0.08%	64.37%	1.62%	159	2	161	65%	0.05%
July	318,426	731	0.23%	62.38%	2.60%	456	6	462	63%	0.15%
August	317,244	934	0.29%	70.45%	1.50%	658	3	661	71%	0.21%
September	316,729	1,815	0.57%	64.35%	0.94%	1,168	16	1,184	65%	0.37%
October	312,864	1,242	0.40%	65.30%	0.81%	811	8	819	66%	0.26%
November	309,414	301	0.10%	51.50%	0.33%	155	1	156	52%	0.05%
December	305,902	306	0.10%	0.33%	0.00%	1	1	2	1%	0.00%
YTD Total	305,902	7,010	2.29%	62.23%	1.40%	4,362	53	4,415	63%	1.44%

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.

CARE Table 3C - Post-Enrollment Verification Re-Enrollment Rates (Model) - 2024					
Month Removed ¹	Total Customers Removed	Re-Enrolled by 6 Months ²	6 Month Re-Enrollment Rate	Re-Enrolled by 12 Months ²	12 Month Re-Enrollment Rate
Jan-23	1,841	362	20%	462	25%
Feb-23	1,389	267	19%	337	24%
Mar-23	1,370	272	20%	332	24%
Apr-23	1,407	278	20%	345	25%
May-23	1,750	366	21%	445	25%
Jun-23	1,427	315	22%	373	26%
Jul-23	1,713	380	22%	466	27%
Aug-23	1,347	232	17%	312	23%
Sep-23	1,333	258	19%	342	26%
Oct-23	350	75	21%	93	27%
Nov-23	10	1	10%	2	20%
Dec-23	16	1	6%	2	13%

¹ Reflects customers removed in the previous year to allow for the 12 month re-enrollment period

² Customers Re-Enrolled by 6 and 12 months may include customers that were originally on FERA and re-enrolled into CARE after PEV

CARE Table 3D - Post-Enrollment Verification Re-Enrollment Rates (High Usage) - 2024					
Month Removed ¹	Total Customers Removed	Re-Enrolled by 6 Months ²	6 Month Re-Enrollment Rate	Re-Enrolled by 12 Months ²	12 Month Re-Enrollment Rate
Jan-23	200	48	24%	72	36%
Feb-23	308	55	18%	87	28%
Mar-23	340	47	14%	80	24%
Apr-23	114	22	19%	28	25%
May-23	49	7	14%	10	20%
Jun-23	55	7	13%	13	24%
Jul-23	169	38	22%	65	38%
Aug-23	464	84	18%	129	28%
Sep-23	429	101	24%	155	36%
Oct-23	267	55	21%	85	32%
Nov-23	110	21	19%	31	28%
Dec-23	118	30	25%	42	36%

¹ Reflects customers removed in the previous year to allow for the 12 month re-enrollment period

² Customers Re-Enrolled by 6 and 12 months may include customers that were originally on FERA and re-enrolled into CARE after PEV

San Diego Gas & Electric Company
CARE Table 4 - CARE Self-Certification and Self-Recertification Applications¹
Program Year 2024 Annual Report

	Provided ²	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total (Y-T-D)	6,700	183,913	138,486	7,834	10,557	27,036
Percentage		100%	75%	4%	6%	15%

¹ Includes sub-metered customers.

San Diego Gas & Electric Company
CARE Table 5 - CARE Enrollment by County
Program Year 2024 Annual Report

County	Estimated Eligible			Total Participants			Enrollment Rate		
	Urban	Rural ¹	Total	Urban	Rural	Total	Urban	Rural	Total
	18,596	0	18,596	14,631	0	14,631	79%	0%	79%
	263,877	7,457	271,334	284,470	6,801	291,271	108%	91%	107%
Total	282,473	7,457	289,930	299,101	6,801	305,902	106%	91%	106%

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.

San Diego Gas & Electric Company
CARE Table 6 - CARE Recertification Results
Program Year 2024 Annual Report

2024	Total CARE 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	337,096	11,947	3.5%	4,524	6,032	38%	1.79%
February	335,915	12,407	3.7%	5,013	5,545	40%	1.65%
March	335,312	12,268	3.7%	5,920	5,046	48%	1.50%
April	333,058	13,488	4.0%	6,849	5,064	51%	1.52%
May	328,637	11,490	3.5%	5,858	4,225	51%	1.29%
June	324,149	11,629	3.6%	5,719	4,534	49%	1.40%
July	318,426	10,447	3.3%	5,135	4,156	49%	1.31%
August	317,244	10,038	3.2%	4,981	4,013	50%	1.26%
September	316,729	8,336	2.6%	4,289	3,009	51%	0.95%
October	312,864	8,305	2.7%	4,254	681	51%	0.22%
November	309,414	8,581	2.8%	3,551	343	41%	0.11%
December	305,902	8,119	2.7%	2,395	228	29%	0.07%
YTD	305,902	127,055	41.53%	58,488	42,876	46%	14.02%

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.

San Diego Gas & Electric Company
CARE Table 7 - CARE Capitation Contractors
Program Year 2024 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			37	1,570	1,607	\$ 32,140
ALPHA MINI MART	X				-	47	47	\$ 1,410
AMERICAN RED CROSS WIC OFFICES		X	X		-	-	-	\$ -
BACKCOUNTRY COMMUNITIES THRIVING	X	X			-	-	-	\$ -
BONITA FAMILY RESOURCE CENTER		X			-	3	3	\$ 90
CAMPESINOS UNIDOS INC (CUI)		X			4	122	126	\$ 3,780
CHALDEAN COMMUNITY COUNCIL		X	X		-	25	25	\$ 750
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			-	49	49	\$ 1,470
NEIGHBORHOOD HEALTH CARE		X			-	4	4	\$ 120
NORTH COUNTY HEALTH PROJECT, INC.	X				-	-	-	\$ -
ORANGE COUNTY UNITED WAY (211 OC)		X			-	-	-	\$ -
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	-	-	\$ -
SAN YSIDRO HEALTH CENTERS		X			-	8	8	\$ 240
SCRIPPS HEALTH WIC		X			-	4	4	\$ 120
SOMALI BANTU ASSOCIATION OF AMERICA		X			-	-	-	\$ -
SOMALI FAMILY SERVICES		X			-	-	-	\$ -
UNION OF PAN ASIAN COMMUNITIES		X	X		-	-	-	\$ -
VISTA COMMUNITY CLINIC		X			-	5	5	\$ 150
Total Enrollments and Expenditures					41	1,847	1,888	\$ 40,570

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.

San Diego Gas & Electric Company
CARE Table 8 - CARE Participants as of Month-End
Program Year 2024 Annual Report

2024	Gas and Electric	Gas Only ¹	Electric Only	Total	Eligible Households	Enrollment Rate	% Change
January	197,276	0	139,820	337,096	289,930	116%	0.08%
February	196,144	0	139,771	335,915	289,930	116%	-0.41%
March	195,808	0	139,504	335,312	289,930	116%	-0.21%
April	194,100	0	138,958	333,058	289,930	115%	-0.78%
May	191,271	0	137,366	328,637	289,930	113%	-1.52%
June	188,311	0	135,838	324,149	289,930	112%	-1.55%
July	184,804	0	133,622	318,426	289,930	110%	-1.97%
August	183,977	0	133,267	317,244	289,930	109%	-0.41%
September	183,484	0	133,245	316,729	289,930	109%	-0.18%
October	181,224	0	131,640	312,864	289,930	108%	-1.33%
November	179,104	0	130,310	309,414	289,930	107%	-1.19%
December	177,074	0	128,828	305,902	289,930	106%	-1.21%

¹ All SDG&E CARE customers receive at least electric service resulting in zero gas only CARE customers.

San Diego Gas & Electric Company
CARE Table 9 - CARE Average Monthly Usage & Bill
Program Year 2024 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	14.7	8.4	23.1
CARE	14.9	5.6	20.4
Customer	Electric KWh	Electric KWh	Total
	Tier 1	Tier 2 and Above	
Non-CARE	261	100	361
CARE	283	79	361

Average Monthly Gas / Electric Bill		
Residential Non-CARE vs. CARE Customers¹		
(Dollars per Customer)		
Customer	Gas	Electric
Non-CARE	\$45.33	\$146.01
CARE	\$29.28	\$90.80

¹ Excludes master-meter usage.

San Diego Gas & Electric Company
CARE Table 10A - 10B - CARE Surcharge & Revenue
Program Year 2024 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	\$ 5.63	\$ 157	3.59%	\$ 60,953,362	28.79%
Commercial	\$ 22.23	\$ 512	4.34%	\$ 33,368,539	15.76%
Agricultural	\$ 116.71	\$ 1,934	6.03%	\$ 5,589,627	2.64%
Large/Indust	\$ 614.60	\$ 11,576	5.31%	\$ 111,804,211	52.81%

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	\$ 2.04	\$ 112	1.82%	\$ 16,627,447	63.73%
Commercial	\$ 17.89	\$ 536	3.33%	\$ 6,422,510	24.62%
Natural Gas Vehicle	\$ 1,842.68	\$ 32,252	5.71%	\$ 1,079,813	4.14%
Industrial	\$ 3,059.18	\$ 36,116	8.47%	\$ 1,960,940	7.52%

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. The CARE Surcharge in the Rate Schedule E-CARE which is used in this revenue calculation is a combination of all programs CARE customers are exempt from and includes CARE, FERA, CSI, Food Bank, and RUBA.

² Excludes CARE customers.

San Diego Gas & Electric Company
CARE Table 11 - CARE Capitation Applications¹
Program Year 2024 Annual Report

Entity	Total Received	Approved ²	Denied	Pending/ Never Completed	Duplicate
211 SAN DIEGO	3,569	2,316	37	220	996
ALPHA MINI MART	477	73	1	6	397
AMERICAN RED CROSS WIC OFFICES	0	0	0	0	0
BACKCOUNTRY COMMUNITIES THRIVING	0	0	0	0	0
BONITA FAMILY RESOURCE CENTER	11	3	0	0	8
CAMPESINOS UNIDOS INC (CUI) - CARE	174	129	1	1	43
CHALDEAN COMMUNITY COUNCIL	52	44	2	0	6
CHULA VISTA COMMUNITY COLLABORATIVE	17	16	0	1	0
COMMUNITY RESOURCE CENTER	1	1	0	0	0
ELDERHELP OF SAN DIEGO	0	0	0	0	0
HEARTS AND HANDS WORKING TOGETHER	1	0	0	1	0
INTERFAITH COMMUNITY SERVICES	0	0	0	0	0
LA MAESTRA FAMILY CLINIC	51	40	2	9	0
NEIGHBORHOOD HEALTH CARE	5	4	0	1	0
NORTH COUNTY HEALTH PROJECT, INC.	4	0	1	3	0
ORANGE COUNTY UNITED WAY (211 OC)	0	0	0	0	0
SAN DIEGO STATE UNIVERSITY WIC OFFICES	2	0	0	1	1
SAN YSIDRO HEALTH CENTERS	7	7	0	0	0
SCRIPPS HEALTH WIC	4	4	0	0	0
SOMALI BANTU ASSOCIATION OF AMERICA	0	0	0	0	0
SOMALI FAMILY SERVICES	0	0	0	0	0
UNION OF PAN ASIAN COMMUNITIES	0	0	0	0	0
VISTA COMMUNITY CLINIC	8	7	0	1	0
Total	4,383	2,644	44	244	1,451

¹ Includes sub-metered customers.

² Includes new enrollments and recertification applications approved.

San Diego Gas & Electric Company
CARE Table 12 - CARE Expansion Program
Program Year 2024 Annual Report

CARE Table 12A Participating Facilities by Month						
2022	Gas			Electric		
	CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
January	116	47	163	370	86	456
February	116	47	163	370	87	457
March	100	46	146	301	89	390
April	80	40	120	261	82	343
May	81	43	124	271	89	360
June	82	40	122	231	86	317
July	80	40	120	229	87	316
August	91	40	131	242	87	329
September	96	42	138	268	97	365
October	91	41	132	262	94	356
November	91	41	132	262	93	355
December	93	39	132	265	89	354

CARE Table 12B Average Monthly Gas / Electric Usage¹		
Customer	Gas Therms	Electric KWh
Residential Facilities	42	403
Commercial Facilities	589	13,642

CARE Table 12C Expansion Self-Certification and Self-Recertification Applications					
	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	39	33	1	5	0
Percentage		85%	3%	13%	0%

¹ Excludes master meter usage.

San Diego Gas & Electric Company
CARE Table 13 - CARE High Usage Verification Results⁴
Program Year 2024 Annual Report

Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation ⁵			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	Appeals Denied	Appeals Approved
7,010	4,362	53	311	127	27	151	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% or 600% of baseline.

⁵ SDG&E has altered its methodology for identifying ESA participation for customers that have income verified for CARE and were referred to ESA. This has caused more accurate results for determining Stage 2 outcomes in 2024.

San Diego Gas & Electric Company
CARE Table 14 - CARE Customer Usage and ESA Program Treatment
Program Year 2024 Annual Report

# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV	Percent of those CARE customers Not served by ESA Program	# of Enrollments led to ESA Program measure Installations	# of Long-Term tenancy CARE customers who have Not applied for ESA Program ¹	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment ¹				Energy Usage of CARE customers who do Not accept ESA Program treatment
				Energy Usage before ESA Program treatment	Energy Usage within 3-months of ESA Program treatment	Energy Usage within 6-months of ESA Program treatment	Energy Usage within 12-months of ESA Program treatment	
9,466	79%	69	7,488	651	621	N/A	N/A	658

¹ Long-Term Tenancy CARE customers are those who have been enrolled in the program and stayed at the same meter for over 6 years.

San Diego Gas & Electric Company
CARE Table 15 - CARE Categorical Enrollment
Program Year 2024 Annual Report

Type of Enrollment	Number of Customer Enrollments ¹
Bureau of Indian Affairs General Assistance	65
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	19,523
CalWORKs/Temporary Assistance for Needy Families (TANF) ²	2,138
Head Start Income Eligible - (Tribal Only)	145
Healthy Families A&B	5
Low-income Home Energy Assistance Program (LIHEAP)	1,664
Medicaid/Medi-Cal	35,058
National School Lunch Program (NSLP) - Free Lunch	8,227
Supplemental Security Income (SSI)	4,728
Tribal TANF ²	-
Women, Infants, and Children Program (WIC)	4,984

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.

San Diego Gas & Electric Company
CARE Table 16 - CARE and Disadvantaged Communities Enrollment Rate for Zip Codes ¹
Program Year 2024 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) ²	CARE Enrollment Rate for DAC (Zip/Census Tract) Codes in High Poverty (with 70% or Less CARE Enrollment Rate)
January	88.73%	122.64%	67.17%	N/A
February	87.89%	121.92%	66.77%	N/A
March	87.52%	121.51%	66.59%	N/A
April	87.07%	120.82%	66.19%	N/A
May	87.27%	119.13%	65.74%	N/A
June	85.78%	117.17%	66.34%	N/A
July	82.00%	114.98%	64.16%	N/A
August	83.77%	114.72%	64.01%	N/A
September	80.76%	114.27%	64.39%	N/A
October	80.58%	112.62%	65.52%	N/A
November	80.71%	111.41%	65.46%	N/A
December	81.84%	110.02%	64.49%	N/A
YTD	81.84%	110.02%	64.49%	N/A

¹ 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.

² Penetration Rate and Enrollment Rate are the same value.

San Diego Gas & Electric Company
FERA Table 1 - FERA Overall Program Expenses
Program Year 2024 Annual Report

Category	Overall Expenditures		Total ³	Authorized Budget ¹	% of Budget Spent	Total Shifted ²	Shifted to/from?
	Electric	Gas					
Marketing, Education, & Outreach	\$ 463,170	N/A	\$ 463,170	\$ 427,754	108%	\$ 59,416	Shifted \$50,000 from Measurement & Evaluation; \$6,622 from IT Programming; \$1,809 from General Administration; and \$985 from Regulatory Compliance
Processing, Certification, & Recertification	\$ 24,570	N/A	\$ 24,570	\$ 24,570	100%	\$ 10,645	Shifted \$10,390 from CPUC Energy Division; and \$255 from IT Programming
Post Enrollment Verification	\$ 15,558	N/A	\$ 15,558	\$ 15,558	100%	\$ 14,540	Shifted \$14,540 from General Administration
IT Programming	\$ 47,759	N/A	\$ 47,759	\$ 47,759	100%	\$ (6,877)	Shifted \$6,622 to Marketing, Education, & Outreach; and \$255 to Processing, Certification, and Recertification
Pilots	\$ -	N/A	\$ -	\$ -	0%	\$ -	
Measurement & Evaluation	\$ -	N/A	\$ -	\$ -	0%	\$ (50,000)	Shifted \$50,000 to Marketing, Education, & Outreach
Regulatory Compliance	\$ 31,655	N/A	\$ 31,655	\$ 31,655	100%	\$ (15,525)	Shifted \$14,540 to Post Enrollment Verification; and \$985 to Marketing, Education, & Outreach
General Administration	\$ 74,106	N/A	\$ 74,106	\$ 74,106	100%	\$ (1,809)	Shifted \$1,809 to Marketing, Education, & Outreach
CPUC Energy Division	\$ 413	N/A	\$ 413	\$ 413	100%	\$ (10,390)	Shifted \$10,390 to Processing, Certification, & Recertification
Total Program Costs	\$ 657,230	N/A	\$ 657,230	\$ 621,815	106%	\$ -	
FERA Rate Discount	\$ 3,827,621	N/A	\$ 3,827,621	\$ 4,444,713	86%	\$ -	
Service Establishment Charge Discount	\$ -	N/A	\$ -	\$ -	0%	\$ -	
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 4,484,851	N/A	\$ 4,484,851	\$ 5,066,528	89%	\$ -	

¹ Reflects the total authorized budget approved in D.21-06-015, Attachment 1, Table 4, adjusted for 2024 fund shifts per the rules in D.21-06-015, allowing IOUs to reallocate funds within FERA program categories 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 program costs have been updated from the 2024 Annual Report Activity on FERA to account for any trailing invoices received in 2025 that pertain to Program Year 2024.

San Diego Gas & Electric Company
 FERA Table 2 - FERA Enrollment, Recertification, Attrition, & Penetration
 Program Year 2024 Annual Report

YTD	New Enrollment										Recertification					Attrition (Drop Offs)					Enrollment		Total FERA Participants by Dwelling Type			Total FERA Participants	Estimated FERA Eligible	Enrollment Rate % (W/X)
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response ¹	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)	SF	MF	MH				
	Inter-Utility ¹	Intra-Utility ²	Leveraging	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																			
January	0	5	0	5	328	23	21	3	375	380	44	79	2	125	253	0	147	-98	302	505	78	6,989	3,652	50	10,506	41,374	25%	
February	0	10	0	10	237	13	16	2	268	278	18	39	3	60	189	0	133	154	476	338	-198	6,861	3,583	45	10,508	41,374	25%	
March	0	8	0	8	287	16	19	2	324	332	32	67	6	105	228	0	176	123	525	437	-193	6,742	3,496	43	10,115	41,374	24%	
April	0	4	0	4	232	19	7	2	260	264	39	45	5	89	330	2	119	70	521	353	-257	6,559	3,434	41	9,858	41,374	24%	
May	0	3	0	3	241	13	16	0	270	273	33	55	5	93	522	0	175	-23	674	366	-401	6,355	3,347	44	9,457	41,374	23%	
June	0	0	0	0	420	30	18	1	469	469	39	42	3	84	280	1	121	181	583	553	-114	6,132	3,330	42	9,343	41,374	23%	
July	0	6	1	7	848	13	10	1	872	879	51	145	2	198	298	3	181	22	504	1,077	375	6,351	3,456	42	9,718	41,374	23%	
August	0	7	0	7	762	20	31	1	814	821	56	129	3	188	221	0	177	210	608	1,069	213	6,442	3,577	36	9,931	41,374	24%	
September	0	5	0	5	890	18	32	6	946	951	35	206	6	247	221	0	118	-10	329	1,198	622	7,308	3,793	35	10,553	41,374	26%	
October	0	2	0	2	1,119	11	14	2	1,146	1,148	67	359	3	429	292	0	123	-178	237	1,577	911	7,308	4,099	34	11,464	41,374	28%	
November	0	3	0	3	1,037	7	16	1	1,061	1,064	22	388	2	412	199	0	103	-118	184	1,476	880	7,832	4,317	36	12,344	41,374	30%	
December	0	4	0	4	808	7	17	12	844	848	25	92	4	121	234	0	91	99	424	969	424	8,080	4,452	35	12,768	41,374	31%	
YTD Total	0	87	1	88	7,309	190	217	33	7,649	7,707	461	1,646	44	2,351	3,265	6	1,664	432	5,367	9,858	2,340	8,080	4,452	35	12,768	41,374	31%	

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.

San Diego Gas & Electric Company
FERA Table 3A-3D - FERA Post-Enrollment Verification Results
Program Year 2024 Annual Report

FERA Table 3A - Post-Enrollment Verification Results (Model) 2024										
Month	Total FERA Households Enrolled	Households Requested to Verify ¹	% of FERA Enrolled Requested to Verify Total	% of Scheduled Customers not Responsive to the PEV Process	% of Scheduled PEV Customers later verified as Income Eligible	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	10,506	69	0.66%	72.46%	0.02%	49	1	50	72%	0.48%
February	10,308	72	0.70%	77.78%	0.00%	55	1	56	78%	0.54%
March	10,115	74	0.73%	68.92%	0.00%	51	0	51	69%	0.50%
April	9,858	92	0.93%	65.22%	0.02%	57	3	60	65%	0.61%
May	9,457	36	0.38%	77.78%	0.00%	27	1	28	78%	0.30%
June	9,343	8	0.09%	25.00%	0.00%	2	0	2	25%	0.02%
July	9,718	8	0.08%	0.00%	0.00%	0	0	0	0%	0.00%
August	9,931	9	0.09%	0.00%	0.00%	0	0	0	0%	0.00%
September	10,553	4	0.04%	0.00%	0.00%	0	0	0	0%	0.00%
October	11,464	0	0.00%	0.00%	0.00%	0	0	0	0%	0.00%
November	12,344	32	0.26%	0.00%	0.00%	0	0	0	0%	0.00%
December	12,768	17	0.13%	0.00%	0.00%	0	0	0	0%	0.00%
YTD Total	12,768	421	3.30%	58.67%	0.00%	241	6	247	59%	1.93%

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) 2024 ¹										
Month	Total FERA Households Enrolled	Households Requested to Verify ²	% of FERA Enrolled Requested to Verify Total	% of Scheduled Customers not Responsive to the PEV Process	% of Scheduled PEV Customers later verified as Income Eligible	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible) ³	Total Households De-enrolled ⁴	% De-enrolled through HUV Post Enrollment Verification	% of Total FERA Households De-enrolled
January	10,506	0	0.00%	0.00%	0.00%	0	0	0	0%	0.00%
February	10,308	0	0.00%	0.00%	0.00%	0	0	0	0%	0.00%
March	10,115	0	0.00%	0.00%	0.00%	0	0	0	0%	0.00%
April	9,858	0	0.00%	0.00%	0.00%	0	0	0	0%	0.00%
May	9,457	0	0.00%	0.00%	0.00%	0	0	0	0%	0.00%
June	9,343	0	0.00%	0.00%	0.00%	0	0	0	0%	0.00%
July	9,718	0	0.00%	0.00%	0.00%	0	0	0	0%	0.00%
August	9,931	0	0.00%	0.00%	0.00%	0	0	0	0%	0.00%
September	10,553	0	0.00%	0.00%	0.00%	0	0	0	0%	0.00%
October	11,464	0	0.00%	0.00%	0.00%	0	0	0	0%	0.00%
November	12,344	0	0.00%	0.00%	0.00%	0	0	0	0%	0.00%
December	12,768	0	0.00%	0.00%	0.00%	0	0	0	0%	0.00%
YTD Total	12,768	0	0.00%	0.00%	0.00%	0	0	0	0.00%	0.00%

¹ SDG&E notes that the requirement to implement the high usage post-enrollment verification policy for the FERA program, pursuant to OP 28 of D.21-06-015, will be completed by the end of the program cycle.

² Includes all participants who were selected for high usage verification process.

³ Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

⁴ 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 3C - Post-Enrollment Verification Re-Enrollment Rates (Model) - 2024					
Month Removed ¹	Total Customers Removed	Re-Enrolled by 6 Months ²	6 Month Re-Enrollment Rate	Re-Enrolled by 12 Months ²	12 Month Re-Enrollment Rate
Jan-23	81	5	6%	6	7%
Feb-23	57	18	32%	19	33%
Mar-23	54	6	11%	6	11%
Apr-23	54	6	11%	6	11%
May-23	73	2	3%	2	3%
Jun-23	18	0	0%	1	6%
Jul-23	11	1	9%	1	9%
Aug-23	3	2	67%	2	67%
Sep-23	13	1	8%	1	8%
Oct-23	2	0	0%	0	0%
Nov-23	0	0	0%	0	0%
Dec-23	0	0	0%	0	0%

¹ Reflects customers removed in the previous year to allow for the 12 month re-enrollment period.

² Customers Re-Enrolled by 6 and 12 months may include customers that were originally on CARE and re-enrolled into FERA after PEV.

FERA Table 3D - Post-Enrollment Verification Re-Enrollment Rates (High Usage) - 2024 ¹					
Month Removed ²	Total Customers Removed	Re-Enrolled by 6 Months ³	6 Month Re-Enrollment Rate	Re-Enrolled by 12 Months ³	12 Month Re-Enrollment Rate
Jan-23	0	0	0%	0	0%
Feb-23	0	0	0%	0	0%
Mar-23	0	0	0%	0	0%
Apr-23	0	0	0%	0	0%
May-23	0	0	0%	0	0%
Jun-23	0	0	0%	0	0%
Jul-23	0	0	0%	0	0%
Aug-23	0	0	0%	0	0%
Sep-23	0	0	0%	0	0%
Oct-23	0	0	0%	0	0%
Nov-23	0	0	0%	0	0%
Dec-23	0	0	0%	0	0%

¹ SDG&E notes that the requirement to implement the high usage post-enrollment verification policy for the FERA program, pursuant to OP 28 of D.21-06-015, will be completed by the end of the program cycle.

² Reflects customers removed in the previous year to allow for the 12 month re-enrollment period.

³ Customers Re-Enrolled by 6 and 12 months may include customers that were originally on CARE and re-enrolled into FERA after PEV.

San Diego Gas & Electric Company
FERA Table 4A-4B - FERA Self-Certifications, Self-Recertification Applications and Post-Enrollment Verifications
Program Year 2024 Annual Report

FERA Table 4A						
FERA Self-Certification and Self-Recertification Applications¹						
	Provided²	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	6,700	11,836	8,093	1,774	509	1,460
Percentage		100%	68%	15%	4%	12%

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 Verification¹					
	Requested	Received	Approved	Denied	Pending/Never Completed
Total	421	180	174	6	241

¹ Includes sub-metered customers.

San Diego Gas & Electric Company
FERA Table 5 - FERA Enrollment by County
Program Year 2024 Annual Report

County	Estimated Eligible			Total Participants			Enrollment Rate		
	Urban	Rural ¹	Total	Urban	Rural	Total	Urban	Rural	Total
Orange	2,297	0	2,297	468	0	468	20%	0%	20%
San Diego	37,734	1,343	39,077	12,028	272	12,300	32%	20%	31%
Total	40,031	1,343	41,374	12,496	272	12,768	31%	20%	31%

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.

San Diego Gas & Electric Company
FERA Table 6 - FERA Recertification Results
Program Year 2024 Annual Report

2024	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	10,506	774	7.4%	42	649	5%	6.18%
February	10,308	444	4.3%	26	341	6%	3.31%
March	10,115	464	4.6%	35	385	8%	3.81%
April	9,858	451	4.6%	50	339	11%	3.44%
May	9,457	443	4.7%	42	341	9%	3.61%
June	9,343	518	5.5%	48	410	9%	4.39%
July	9,718	538	5.5%	62	407	12%	4.19%
August	9,931	503	5.1%	27	375	5%	3.78%
September	10,553	388	3.7%	21	288	5%	2.73%
October	11,464	291	2.5%	33	84	11%	0.73%
November	12,344	302	2.4%	13	75	4%	0.61%
December	12,768	313	2.5%	8	31	3%	0.24%
YTD	12,768	5,429	42.52%	407	3,725	7%	29.17%

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.

San Diego Gas & Electric Company
FERA Table 7 - FERA Capitation Contractors
Program Year 2024 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			1	18	19	\$ 380
ALPHA MINI MART					-	-	-	
AMERICAN RED CROSS WIC OFFICES	X				-	-	-	
BACKCOUNTRY COMMUNITIES THRIVING	X	X			-	-	-	
BONITA FAMILY RESOURCE CENTER		X			-	-	-	
CAMPESINOS UNIDOS INC (CUI)		X	X	X	-	-	-	
CHALDEAN COMMUNITY COUNCIL		X	X		-	-	-	
CHULA VISTA COMMUNITY COLLABORATIVE		X	X		-	-	-	
COMMUNITY RESOURCE CENTER		X			-	-	-	
ELDERHELP OF SAN DIEGO					-	-	-	
HEARTS AND HANDS WORKING TOGETHER		X			-	-	-	
INTERFAITH COMMUNITY SERVICES		X			-	-	-	
LA MAESTRA FAMILY CLINIC		X			-	-	-	
MAAC PROJECT		X			-	-	-	
NEIGHBORHOOD HEALTH		X		X	-	-	-	
NORTH COUNTY HEALTH PROJECT, INC.		X			-	-	-	
ORANGE COUNTY UNITED WAY (211 OC)		X						
SAN DIEGO STATE UNIVERSITY WIC OFFICES	X				-	-	-	
SAN YSIDRO HEALTH CENTERS		X			-	-	-	
SCRIPPS HEALTH WIC		X			-	-	-	
SOMALI BANTU ASSOCIATION OF AMERICA		X			-	-	-	
SOMALI FAMILY SERVICES		X			-	-	-	
UNION OF PAN ASIAN COMMUNITIES (UPAC)		X			-	-	-	
VISTA COMMUNITY CLINIC		X			-	-	-	
Total Enrollments and Expenditures					1	18	19	\$ 380

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.

San Diego Gas & Electric Company
FERA Table 8 - FERA Average Monthly Usage & Bill
Program Year 2024 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	266.7	93.8	360.5
FERA	305.2	105.6	410.8

Average Monthly Electric Bill Residential Non-FERA vs. FERA Customers ¹ (Dollars per Customer)		
Customer	Electric	
Non-FERA	\$130.90	
FERA	\$134.86	

¹ Excludes master-meter usage.

Appendix B – ESA Marketing Examples

TV

English TV ad - <https://youtu.be/rarf4eImRRM>



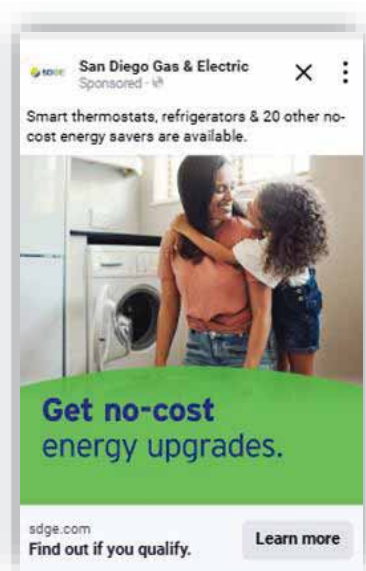
Spanish TV ad - <https://youtu.be/NibXLVD3RzU>




DISPLAY



META & GOOGLE DISPLAY NETWORK




NEXTDOOR

**SDGE**
Sponsored

With Energy Savings Assistance, you can get no-cost home improvements.

Qualifying customers in {{neighborhood}} may get a smart thermostat, refrigerator or 20+ o...
[See more](#)



Get no-cost energy-saving upgrades.

See if you qualify for no-cost home improvements. [Learn more](#)

PRINT

Customer Assistance | 



Energy-saving upgrades at no cost?

Now that's home improvement.

SDG&E's Energy Savings Assistance program offers no-cost home improvements to those who qualify. You could receive energy-efficient upgrades that'll make your home more comfortable, more efficient, and more budget-friendly for years to come. Find out if you qualify at sdge.com/ESA.




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OUT-OF-HOME



Appendix C – CARE Marketing Examples

HIGH IMPACT DIGITAL UNITS

Customer Assistance | 




Sign up for bill discounts and energy-efficient upgrades.

Get savings on your energy bills.

Get no-cost energy upgrades.

< >

Customer Assistance | 





Get savings on your energy bills.

Customer assistance programs can help you save money on your bills. Eligibility is based on participation in certain public assistance programs or income and the number of people in your household.

SEE IF YOU QUALIFY

< >

Customer Assistance | 



Get no-cost energy upgrades.

Eligible customers can get a new smart thermostat, refrigerator, or one of 20 other energy-efficient upgrades to help make your home more comfortable, more efficient, and more budget-friendly.

SEE IF YOU QUALIFY

< >

DISPLAY

Customer Assistance | SDGE



Save 30% or more
on your energy bill. [LEARN MORE](#)

SDGE



Tiết kiệm 30% trở lên
trên hóa đơn năng
lượng của quý vị. [Tìm hiểu Thêm](#)

SDGE



Ahorra 30% o más en
tus facturas de energía. [VER MÁS](#)

META & GOOGLE DISPLAY NETWORK

San Diego Gas & Electric
Sponsored

CARE puede ahorrarte 30% basado en tus ingresos y en cuántos viven en tu hogar.



Obtén 30% menos en
tu cuenta de energía.

sdge.com
Averigua si calificas. [Learn more](#)

San Diego Gas & Electric
Sponsored

Các chương trình Hỗ trợ Khách hàng của SDG&E giúp hộ gia đình đủ điều kiện tiết kiệm. Bao gồm giảm tiền trên hóa đơn và những nâng cấp miễn phí để giảm năng lượng. [Tìm hiểu ngay.](#)



Đăng ký tham gia Hỗ trợ
khách hàng và tiết kiệm.

Đăng ký để giảm hóa đơn năng lượng ngay.



[More](#)

San Diego Gas & Electric
Sponsored

SDG&E has partnered with Beto Perez with Jamin 95.7 to share information about our Customer Assistance programs that can help you save up to 30% off your energy bill. Learn about available assistance programs and who's eligible at [SDGE.com/assistance](#).



[sdge.com/assistance](#)
See if you qualify to save. [Learn more](#)

Xem quý vị có đủ điều kiện để được giảm giá hay không.



Giảm 30%+ hóa đơn năng lượng.

Điều kiện để được giảm giá tùy thuộc vào thu nhập và số người trong nhà. [Tìm hiểu thêm.](#)

PRINT

Customer Assistance | 



**Save 30% or more
on your energy bill.**

That's powerful savings.

A little help can make a big difference. That's why SDG&E offers CARE – a program to lower your energy bills, saving you 30% or more. Applying is easy and confidential. Eligibility is based on income, number of people in your household, or participation in certain public assistance programs. See if you qualify at sdge.com/CARE.




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OUT-OF-HOME






DIRECT MAIL





How much could you have saved on your energy bill?

June 4, 2025

Account number: 


Dear 

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 

BILL AMOUNT

\$1,647

WITHOUT discount



BILL AMOUNT

\$1,153

WITH discount*

Based on 6,148 kilowatt hours over the last 12 months

Based on your energy use, you could have saved approximately **\$494*** 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,

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.

BILL INSERT

We have programs and services to help you manage bills and support your energy needs.



Depending on your household income, you may qualify for a bill discount of 30% or more with our CARE program or an 18% discount with FERA. Applying online is easy.

If you have past-due bills, you may also be able to receive financial assistance under the Low-Income Home Energy Assistance Program (LIHEAP). Flexible payment plans and debt forgiveness are also available for qualified customers. Learn more at sdge.com/assistance. Help is here for you.

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Contamos con programas y servicios para ayudarle a administrar las facturas y respaldar sus necesidades de energía.



Dependiendo de su ingreso familiar, podría calificar para un descuento en la factura del 30% o más con nuestro programa CARE o un descuento del 18% con FERA. Solicitarlo en línea es fácil.

Si tiene facturas vencidas, también podría recibir asistencia financiera bajo el Programa de Asistencia para la Energía para Hogares de Bajos Ingresos (LIHEAP, por sus siglas en inglés). Los planes de pago flexibles y la condonación de deudas también están disponibles para clientes que califiquen. Obtenga más información en sdge.com/asistencia. Hay ayuda disponible para usted.

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Appendix D – ESA Partner Organizations

211 San Diego
Access to Independence
Access Youth Academy
Access, Inc.
Accessity
Adjoin
Alpine Chamber of Commerce
American Red Cross WIC
Amigas Punto Com
Anvil of Hope
Anza Borrego Desert Natural History Association
Arts Education Connection San Diego
Asian Culture and Media Alliance
Autism Society of San Diego
Backcountry Communities Thriving
Backfence Society
Barrio Logan College Institute
Bayside Community Center
Better Business Bureau of SD Imperial and Orange Counties
Black American Political Association of California
Black Tech Link
Blue Star Families

Building Owners & Managers Association of San Diego
Bonita Family Resource Center
Bonsall Chamber of Commerce
Boys & Girls Club of South Coast Area
Boys and Girls Club of San Marcos
Boys and Girls Clubs of Capistrano Valley
Boys and Girls Clubs of Vista
Brazilian Institute for Arts and Culture - BIAC
Casa Familiar
Catholic Charities Diocese of San Diego
Chaldean Community Council
Chula Vista Chamber of Commerce
Chula Vista Community Collaborative (CVCC)
City of San Marcos Senior Activity Center
Community Resource Center
Cool Zones-County of San Diego
County of San Diego-LiveWell
CREER Comunidad Y Familia
Deaf Community Services
D'Vine Path
ElderHelp of San Diego
Emilio Nares Foundation
Empowering Latino Futures

Encinitas Chamber of Commerce
Epilepsy Foundation of San Diego
Episcopal Community Services
Fallbrook Chamber of Commerce
Fallbrook Senior Center
Family Assistance Ministries
Family Health Centers of San Diego
Feeding San Diego
Foundation For Senior Care
Friends of the Fallbrook Community Center
God's Heart Ministries
GRID Alternatives San Diego
Groundwork San Diego Chollas Creek
Heartland Coalition
Hearts and Hands Working Together
Home Start Inc
House of Italy San Diego
House Of Peru
I Love a Clean San Diego
International Facility Management Association of San Diego
Ignatian Lay Volunteer Corporation
Italian American Art & Culture Association
Julian Chamber of Commerce
Julian Cuyamaca Resource Center, Inc.
Kindness Initiative
La Jolla Community Center

La Maestra Community Health Centers
La Mesa Chamber of Commerce
La Posta Band Of Mission Indians
Laguna Niguel Chamber of Commerce
Laguna Niguel Family YMCA
LAO American Coalition
Latino S2U
Lawrence Family Jewish Community Center
lipay Nation of Santa Ysabel
Little Saigon San Diego (Foundation)
Lived Experiences
Living Coast Discovery Center
Logan Heights Community Development Corporation
Los Coyotes Band Of Cahuilla and Cupeno Indians
MANA de San Diego
Meals on Wheels San Diego County
Media Arts Center San Diego
Metropolitan Area Advisory Committee (MAAC)
MiraCosta Collage
Mitchell Thorp Foundation
Multicultural Health Foundation
Neighborhood Health Care
Neighborhood House Association
North County Community Emergency Response Team

North County Health Project, Inc.
Oceanside Museum of Art
Olivewood Gardens Learning Center
Orange County United Way (211 OC)
Pacific Arts Movement
Pacific Southwest Community Development Corporation
Paralyzed Veterans of America, Cal-Diego Chapter
Park Avenue Community Center
Peninsula Shephard Center
Persian Cultural Center
Poway Neighborhood Emergency Corps
ProduceGoods
Ramona Chamber of Commerce
Ramona Senior Center
Resounding Joy
Ride Above Disability Therapeutic Riding Center
San Diego Center for the Blind
San Diego Council on Literacy
San Diego County Farm Bureau
San Diego County Health and Human Services Agency
San Diego Futures Foundation
San Diego Habitat for Humanity
San Diego Housing Commission
San Diego Housing Federation

San Diego Hunger Coalition
San Diego LGBT Community Center
San Diego Oasis
San Diego Regional Center
San Diego Regional East County Chamber of Commerce
San Diego Senior Games Association
San Diego Seniors Community Foundation
San Diego State (SDSU) Research Foundation - WIC
San Diego Youth Services
San Ysidro Health Center
SAY San Diego (Social Advocates for Youth)
Scripps Mercy WIC Program
Scripps Ranch Civic Association
Serving Seniors
Sherman Heights Community Center
Silent Voices
Solana Center for Environmental Innovation
Solutions for Change
Somali Bantu Association of America
Somali Family Service of San Diego
South Bay Unified School District - SunnySlope Elementary
Southern California American Indian Resource Center
Southern California Rental Housing Assoc.

Southern California Tribal Chairmen's Association
Southwestern College Foundation
Springboard CFDI (credit.org)
St. Madeleine Sophie's Center
Support The Enlisted Project
The Arc of San Diego
The San Diego Chinese Historical Society and Museum
Thrive Lemon Grove
Tierra Caliente Academy of Arts
Tricity Food Pantry
Union of Pan Asian Communities

United Way of San Diego
Urban League San Diego County
Urban Youth Collaborative
Valley Center CERT/ Valley Center ARC
Valley Center Chamber of Commerce
Vista Community Clinic
Warner Springs Community Resource Center
We Support U
Women's Resource Center
Words Alive
YMCA of Orange County (Mission Viejo YMCA)
Young Black & 'N Business