

**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)

And Related Matters.

Application 19-11-003
(Filed November 22, 2019)

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

**AMENDED MONTHLY REPORT OF SAN DIEGO GAS & ELECTRIC COMPANY
(U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR JULY 2022**

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September 14, 2022

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**AMENDED MONTHLY REPORT OF SAN DIEGO GAS & ELECTRIC COMPANY
(U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2022**

The purpose of this report is to consolidate activity for the California Alternate Rates for Energy (CARE) Program, Family Electric Rate Assistance (FERA) Program, and Energy Savings Assistance (ESA) Program, and provide the California Public Utilities Commission's (Commission or CPUC) Energy Division with information to assist in analyzing the low income programs. This is the amended seventh monthly report for program year (PY) 2022, and presents year-to-date CARE, FERA, and ESA Program results and expenditures through July 31, 2022, for San Diego Gas & Electric Company (SDG&E).

SDG&E is submitting a correction to ESA Tables 4A and 7. Senate Bill 756 changed the income limits of the ESA Program eligibility, to establish new ESA Program income limits at or below 250% of the Federal Poverty Guidelines, codified by P.U. Code section 739.12, effective July 1, 2022. SDG&E inadvertently submitted its previous report without updating ESA tables 4A and 7 to account for this program change. The revisions are reflected in the corresponding tables in redline.

As such, SDG&E provides this amended report to:

- Update ESA Table 4A to reflect a higher count of ESA-eligible households due to the 250% of Federal Poverty Level (FPL) ESA eligibility criteria that went into effect July 1, 2022.
- Update ESA Table 7 to reflect higher counts of ESA-eligible households by Customer Segment – Demographic, Location, Financial, Health Condition – and to include additional footnotes, which indicate data sources.

Respectfully Submitted

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San Diego Gas & Electric Company

Energy Savings Assistance (ESA) Program,

California Alternate Rates for Energy (CARE)

Program,

And

Family Electric Rate Assistance (FERA) Program

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LOW INCOME ASSISTANCE PROGRAMS MONTHLY REPORT

On June 3, 2021, the California Public Utilities Commission (Commission) voted and unanimously approved, with modifications, the *Decision on Large Investor-Owned Utilities' and Marin Clean Energy's California Alternate Rates for Energy (CARE), Energy Savings Assistance (ESA), and Family Electric Rates for Energy (FERA) Program Applications for Program Years 2021-2026*, which authorized budgets and goals effective July 1, 2021.¹ For the 2022 program year, the authorized program year budgets and homes treated goals in this monthly report reflect those authorized by the Commission in Decision (D.) 21-06-015.² Starting in 2022, the statewide electric investor-owned utilities (IOUs) are including monthly FERA updates regarding expenditures, penetration rates, and outreach in compliance with D.21-06-015.³

1. ESA PROGRAM EXECUTIVE SUMMARY

1.1. ESA Program Overview

The ESA Program 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. To qualify for the ESA Program, a residential customer's household income must be at, or below, 250% of Federal Poverty Guidelines (FPG).⁴ In addition, the ESA Program is available to all housing types regardless of whether they rent or own and is currently comprised of two programs/initiatives: (1) the ESA Main Program for single family (SF) homes, mobile homes

¹ D.21-06-015 at 472, Ordering Paragraph (OP) 3, and at 490 – 491, OP 82.

² *Id.*

³ Pursuant to D.21-06-015, SDG&E will file monthly FERA reports, combined with this report. *See* D.21-06-015 at 435.

⁴ Senate Bill 756 changed the income limits of the ESA Program eligibility, to establish new ESA Program income limits at or below 250% of the Federal Poverty Guidelines, codified by P.U. Code section 739.12, effective July 1, 2022.

(MH), and multifamily (MF) in-unit, and (2) the ESA Common Areas Measure (CAM) initiative for common areas of multifamily properties. In addition, as a result of D.21-06-015, SDG&E will begin efforts for the new ESA Pilot Plus and Pilot Deep Program (Pilot). This monthly report reflects program updates for the current ESA Program design and will be revised in subsequent reports as the new design is implemented.

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

Energy Savings Assistance Main Program

The ESA Main Program provides no-cost energy savings measures to income qualified customers in single-family, mobile homes, and in-units for multifamily properties. The table below provides a summary of the year-to-date activity:

ESA Main Program Summary for 2022			
	Authorized / Forecasted Planning Assumptions⁵	Actual to Date	%
Budget ⁶	\$ 24,305,647	\$7,262,870	30%
Homes Treated ⁷	13,760	5,543	40%
kWh Saved	2,955,161	526,731	18%
kW Demand Reduced	428	69	16%
Therms Saved	127,171	9,396	8%
GHG Emissions Reduced (Tons)	N/A	345	N/A

Energy Savings Assistance Multifamily Common Area Measure Initiative

The ESA Multifamily CAM initiative offers income qualified deed-restricted multifamily property owners natural gas and electric weatherization services, energy efficient lighting, energy efficient appliances, and other services at no cost. The table below provides a summary of the year-to-date activity:

⁵ See D.21-06-015, Attachment 1, Tables 5, 6, 7, and 11. Note, however, that footnotes 1 – 3 of Attachment 1 state that the budget, treatment goals/targets, and energy savings goals provided in the applicable tables are inclusive of the entire ESA portfolio, including Main ESA, MF in-unit, MF CAM, and MFWB. Despite these footnotes, SDG&E interprets the Decision as excluding program year 2022 ESA CAM from the budget, treatment goals, and savings goals. The Decision at page 369 states, “[the] ESA CAM carry-forward amount will supplement the IOU approved multifamily budgets for the remainder of PY 2021 and 2022 for the continuation of ESA CAM services.” SDG&E interprets this as excluding ESA CAM from the ESA Main Program summary numbers. Additionally, SDG&E does not believe the Commission intended to further reduce the ESA Main Program budget. See Table 2 of SDG&E Advice Letter 3820-E/3004-G for 2022 MF CAM budgets and property treatment targets, which was approved by the Commission’s Energy Division on September 24, 2021.

⁶ The Budget figures provided herein exclude the budget for the ESA Pilot Plus and ESA Pilot Deep Program.

⁷ Total homes treated reflects enrollments that have been invoiced and paid, for the ESA Program year-to-date.

ESA MF CAM Program Summary for 2022			
	Authorized / Forecasted Planning Assumptions⁸	Actual to Date	%
Budget	\$ 1,600,000	\$588,207	37%
Properties Treated	40	8	20%
kWh Saved	N/A	54,383	N/A
kW Demand Reduced	N/A	12	N/A
Therms Saved	N/A	1,738	N/A

Energy Savings Assistance Pilot Plus and Pilot Deep Program

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

On November 19, 2021, SDG&E filed Advice Letter 3897-E/3037-G, which provided details regarding the Pilot workshop held in September 2021 and SDG&E's Pilot implementation plan. SDG&E's Advice Letter was approved on January 12, 2022. Pursuant to Ordering Paragraph 42 of D.21-06-15, the Pilot program must be launched by the beginning of the third quarter of 2022.

⁸ See Table 2 of SDG&E Advice Letter 3820-E/3004-G for 2022 MF CAM budgets and property treatment targets, which was approved by the Commission's Energy Division via disposition letter dated September 24, 2021.

The Pilot Plus and Pilot Deep RFP closed on April 20, 2022, at which time scoring began. Scoring was ongoing from April 21 through May 20, 2022. SDG&E's solicitation did not receive a sufficient number of responsive proposals based on the qualifications, requirements, and/or scores. Based on the scoring criteria and proposal responsiveness, SDG&E evaluated the responses and determined not to advance the submitted proposals to the interview step.

On June 23, 2022, pursuant to Commission Rule 16.6, SDG&E submitted a request for extension of time to comply with Ordering Paragraph (OP) 42 and Attachment 2 of D.21-06-015 from the beginning of the third quarter of 2022, to the end of the second quarter of 2023. OP 42 and Attachment 2 of D.21-06-015 direct the IOUs to implement and launch the Staff Proposal for the Energy Savings Assistance (ESA) Program design concept on a pilot basis; the Pilot Plus and Pilot Deep by the beginning of the third quarter of 2022. Executive Director Peterson subsequently granted SDG&E's request for extension of time to comply on June 30, 2022.

As such, SDG&E plans to move forward with modifying the solicitation to more closely align with Southern California Edison Company's and Southern California Gas Company's (SCE/SCG) program implementation plan as approved in their respective advice letters.⁹ SDG&E selected this option because it provides the bidders with a definitive implementation plan, already approved by the Energy Division, thus effectively facilitating the proposal development process. SDG&E appreciates and understands the importance of implementing the proposed pilot, and this option allows for the most expedited process that is also open to all interested bidders, as required by D.21-06-015. SDG&E believes this option is the most

⁹ See SCG Advice Letter 5902, approved January 12, 2022, and effective December 24, 2021. *See also* SCE AL 4650-E, approved January 12, 2022, and effective December 22, 2021.

beneficial to ratepayers because it provides for a fair and open solicitation, while utilizing a Commission-approved program design. Additionally, SDG&E believes, based on its experience, that re-issuing the RFP for a bidder-proposed program design, as was the case in SDG&E’s original RFP, would likely result in the same market-driven outcome: a solicitation response that does not meet the applicable solicitation criteria so as to result in an award, thus further delaying implementation of the Pilot.

Further, SDG&E intends to file a new Advice Letter using a Pilot approach similar to SCE and SCG’s approved design, which included a utility designed Pilot. SDG&E will reissue a Pilot solicitation in 2022. On August 2, 2022, SDG&E updated the joint IOU timeline for posting on its website. On August 17, 2022, SDG&E provided an updated Solicitation Plan to the service list with the information on the Pilot details.

ESA Pilot Plus and Pilot Deep Summary for 2022			
	Authorized / Planning Assumptions	Actual to Date	%
Budget ¹⁰	\$ 1,526,683	\$ 0	0
Homes Treated ¹¹	N/A	0	0
kWh Saved	N/A	0	0
kW Demand Reduced	N/A	0	0
Therms Saved	N/A	0	0
GHG Emissions Reduced (Tons)	N/A	0	0

¹⁰ D.21-06-015 at Attachment 2, Table 1.

¹¹ Home treatment and energy savings goals specific to the Pilot were not provided in D.21-06-015.

Program Measure Changes

D.21-06-015 allows the utilities, in consultation with the statewide ESA Program Working Group, to update the measure mix through the ESA Program monthly report.¹² On December 22, 2021, the Commission's Energy Division approved the Joint IOU Advice Letter for the ESA Program design and delivery of measure treatment tiers and measures for program years 2022 through 2026.¹³ In the month of July, no measure changes were made to SDG&E's approved measure mix.

1.2. ESA Program Customer Outreach and Enrollment Update

1.2.1. Provide a summary of the ESA Program outreach and enrollment strategies deployed this month.

Below is a summary of ESA Program specific efforts conducted this reporting month. Joint CARE and ESA Programs marketing, education and outreach efforts are provided in Section 1.2.2 below.

ESA Main Program Contractor Outreach

SDG&E has agreements with four Outreach and Assessment (O&A) contractors enrolling customers through canvassing, SDG&E generated leads, and Low Income Home Energy Assistance Program (LIHEAP) leveraging efforts. The largest source of enrollments is door-to-door canvassing efforts through SDG&E's primary O&A contractor. During this reporting month, 388 ESA enrollments were received through canvassing efforts, which is a 28% decrease when compared to prior month activity. Overall, ESA Program Marketing, Education, and

¹² D.21-06-015 at 486, OP 69.

¹³ See Advice Letters SDG&E 3842-E/3012-G, Southern California Edison Company 4578-E, Pacific Gas and Electric Company 4482-G/6314-E, Southern California Gas Company 5861-G, approved December 22, 2021, and effective October 1, 2021.

Outreach (ME&O) efforts were successful in creating 6,116 leads and 781 enrollments this month.

ESA MF CAM Initiative Contractor Outreach

During this reporting month, SDG&E's ESA Program MF CAM implementer continued targeted marketing to potential ESA MF CAM properties, including re-syndication projects in SDG&E's service territory. Three properties were treated this month for a total of eight properties in 2022. In addition, seven properties are currently receiving measure installations and fourteen properties are pending energy assessments/audits. The ESA CAM implementor has reported supply chain issues that have delayed the receipt of some measures and materials, especially high efficiency boilers and HVAC systems, which hindered the implementor's ability to close out projects and complete property treatments.

ESA Pilot Plus and Pilot Deep Contractor Outreach

Section 3 of Attachment 2 in D.21-06-015, authorizes the IOUs to allocate minimal funds for marketing and outreach efforts specific to this Pilot. Outreach and enrollment information will be provided once available. Since the Pilot is intended to install all available ESA measures, the Pilot will leverage all relevant ESA Main program marketing, education, and outreach materials to minimize cost.

Language Line

Language Line® is utilized to make sure customers with limited English proficiency (LEP) have a channel in which to communicate with ESA Program contractors in the language of their preference. As detailed in the table below, six customers were served by the Language Line this month.

Language	Calls
Mandarin	2
Dari	1
Russian	1
Pashto	1
Vietnamese	1
Total	6

Tribal Outreach

SDG&E's Outreach and Tribal Relations teams work together to effectively engage and communicate with the 16 Federally recognized tribes SDG&E serves. As part of an ongoing initiative to educate the tribes on available Customer Assistance programs and determine eligibility for tribal members, SDG&E is hosting a series of presentations to review relative program information and provide materials to interested and eligible tribes. To date, SDG&E Outreach has sent requests to meet with all 16 tribes and has met with 12 of the tribes. SDG&E will continue to reach out to the remaining four tribes in its territory.

In 2022, SDG&E will continue to invite each tribe to meet and discuss additional areas of opportunity, while continuing collaboration and engagement around Customer Assistance programs and key company initiatives.

1.2.2. Customer Assistance Marketing, Education and Outreach for the CARE, FERA, and ESA Programs.

SDG&E utilizes an integrated ME&O strategy by connecting with customers using general awareness marketing, direct marketing, and community outreach and engagement. The 2022 campaign intends to connect with customers to drive conservation and provide monthly savings on their energy bill. General tactics, such as TV and OTT, will continue to represent the joint efforts on behalf of the CARE, FERA and ESA programs, while more targeted tactics, such as print and digital, will support one program. The campaigns will run in English, Spanish and where appropriate, Asian languages. SDG&E will continue a robust outreach program and will continue to monitor the status of the COVID-19 pandemic and adjust ME&O efforts accordingly.

General Awareness Marketing

General awareness marketing allows SDG&E to connect with its customers through mass media efforts reaching both mass audiences and hard-to-reach populations, including customers in rural areas, seniors, customers with special needs, and multilingual/multicultural customers. The tactics leveraged this month are summarized in the following sections:

Online Advertising

SDG&E launched an ESA-specific digital campaign, including paid social, search and display.

ESA Digital Advertising – July			
	Impressions	CTR	Conversions*
Paid Social	169,416	2.94%	N/A
Search	17,535	1.22%	334
Display	260,933	0.17%	28

*Conversions are customers who clicked from an ad through to the last page of the application and do not reflect if a customer finished the application or whether an application was accepted.

Social Media

Using e-newsletters, website posts, and social media channels, the Energy Solutions Partner Network shared over 145 customer assistance messages to an audience of more than 406,000 followers. SDG&E's social media profile also posts messaging to an audience of more than 44,000 followers. These messages are then able to be redistributed to other networks on social media.



Direct Marketing

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

Email

For customers with an email on file, SDG&E sent an email to promote the ESA Program to potential customers, which was sent to 56,2123 customers with a 47% Open Rate and 2.8% CTR.

Direct Mail

SDG&E did not send out any ESA Program postcards to potential customers who do not have an email address on file.

Live CARE Call Campaign

SDG&E's third-party contractor, The Harris Group (THG), called targeted customers to enroll in the CARE Program.¹⁴ The campaign provides SDG&E with a way to directly connect with customers in low income and hard-to-reach areas. THG provides education about the CARE, FERA, and ESA Programs and assists customers in completing program application forms. Outbound call activities generated the following numbers this month:

The Harris Group	
ESA Leads	2,905
CARE Enrollments	1,989
CARE Recertifications	172
FERA Enrollments	69
FERA Recertifications	2

Community Outreach & Engagement

Energy Solutions Partner Network

SDG&E works closely with a network of approximately 200 community-based organizations (CBOs) to connect customers with programs and solutions related to Customer Assistance, Energy Efficiency and Conservation, SDG&E's COVID-19 response, Public Safety Power Shutoff resiliency, and wildfire preparedness. These organizations represent the diversity of SDG&E's customers within its service territory. The majority of these CBOs are small, grassroots agencies serving customers with access and functional needs, including those that are

¹⁴ THG is a Diverse Business Enterprise (DBE) vendor and a woman-owned business.

multicultural, multilingual, low income, seniors, and LEP audiences in communities of concern. These partners help educate and enroll customers in low income programs utilizing a variety of tactics, including messaging through email and social media channels such as Facebook, Twitter, and Instagram, posting information on their websites, providing booth space at events, and hosting enrollment day fairs at their locations. SDG&E's partner outreach activities resulted in the following activities this month:

Energy Solutions Partner Network	
ESA Leads	0
CARE Enrollments	1
CARE Recertifications	10
FERA Enrollments	1
FERA Recertifications	0

Partner Spotlight

SDG&E's Customer Outreach and Engagement team participated in over 35 events, presentations, trainings, and workshops that featured information and enrollment in energy solutions programs, services, and tools. Many of these activities were hosted by SDG&E's partner network and included drive-through events, such as food drives, where information was shared in a safe manner while following COVID-19 social distancing guidelines. Outreach activities were focused on engaging customers with programs and solutions such as CARE, FERA, and ESA and reached over 4,900 people. A few of the outreach events SDG&E participated in are highlighted below.

God's Heart Ministries

On July 29, 2022, SDG&E attended the Veteran Resource Fair hosted by God's Heart Ministries. God's Heart Ministries, among other things, helps women of the community with

legal issues related to domestic abuse. Food and information regarding the CARE, ESA, FERA and Medical Baseline programs was available and distributed to families.

Hearts and Hands Working Together

On July 30, 2022, SDG&E participated in a Back to School event hosted by Heart and Hands Working Together. Hearts and Hands strives to provide food, and clothing to underserved and at-risk individuals/families in the San Ysidro Community and refers them to other available resources. SDG&E CARE, FERA and ESA program materials were distributed to the families that attended this event.

Multicultural Outreach

To continue efforts to reduce potential barriers and increase education and program enrollments for customers in the rural, multicultural/multilingual, and access and functional needs segments, SDG&E pairs multicultural contractors with employees that are fluent in various languages to help staff events and presentations. These contractors are fluent in the following languages: Spanish, Chinese, Aramaic/Arabic, and other languages, as requested. During this reporting month, SDG&E participated in the following multicultural community outreach events:

Date	Event Name	Partner/Host	Location
7/1/2022	La Maestra Summer Safety Awareness Health Fair	La Maestra Community Health Centers	La Maestra Community Health Centers 4060 Fairmount Ave. San Diego CA., 92105
7/23/2022	Lawn Program at Balboa Park	House of Peru	House of Peru - Balboa Park 2145 Pan American Rd W. San Diego, CA 92101
7/30/2022	Day of Play	Olivewood Gardens & Learning Center	Olivewood Gardens & Learning Center 2525 N Avenue National City, CA 91950

Other Customer Engagement Efforts

In addition to SDG&E's ME&O efforts described above, SDG&E has several other customer engagement efforts to educate, enroll, and provide direct service to its low income customers. These efforts include direct service from SDG&E's Customer Contact Center (CCC) and Payment Offices, as well as the distribution of materials through other SDG&E customer-facing groups/programs and field services teams. Updated information, as it relates to ongoing customer engagement and the impacts of the COVID-19 pandemic, will continue to be provided in subsequent monthly reports.

SDG&E Customer Contact Center (CCC), Branch Offices, and Payment Offices

SDG&E's CCC, Branch Offices, and Payment Offices promote and offer the CARE, FERA, and ESA Programs to potentially eligible customers. SDG&E also promotes CARE at its Authorized Payment Locations (APLs). Additionally, the Outreach team assists at Branch Office locations on a seasonal basis to help enroll customers. In late May 2022, SDG&E reopened four of the branch offices to the public. Branch offices are now accepting CARE/FERA applications in person and helping those who stop in.

In D.16-06-054, SDG&E received Commission authorization for its CCC Energy Service Specialists to enroll customers directly into the CARE Program over the telephone. During this reporting month, SDG&E's CCC and Branch Office generated the following applications and leads over the telephone:

	CCC	Branch Office
ESA Leads	31	0
CARE Enrollments	1	26
CARE Recertifications	19	54
FERA Enrollments	0	0
FERA Recertifications	0	1

1.2.3. Managing Energy Use

As part of SDG&E's Energy Education, O&A contractors review customers' bills and provide customers with information on how to best manage their energy use as they walk through the in-home assessment. For example, as a contractor is examining the water heater, they will educate the customer on setting the appropriate water temperature of the water heater to help reduce cost. The customer is also provided with the opportunity to enroll in My Account, if not currently participating, and educated on the resources that can be utilized for energy management through the My Account tool. Energy Savings opportunities are also included in the statewide Energy Savings Assistance Program Energy Education booklet, which is reviewed with the customer at the time of the home visit. The ESA Program is also partnering with SDG&E's Power Saver Rewards Program to leverage the ESA Program In-Home Energy Education process to inform customers about the program.

1.2.4. Services to Reduce Energy Bill

To help educate customers on their energy use, customers can take a free online five-minute Home Energy Checkup. By answering a few basic questions on how they use energy, the survey identifies which of our programs, tips, and tools can assist customers to save energy. The customized tips range from no-or-low-cost upgrades to long-term solutions to help reduce energy use and save money. For more info, please visit sdge.com/survey.

1.3. Leveraging Success Evaluation, Including California Department of Community Services and Development (CSD)

(Comments from Energy Division: For example, include efforts for Disadvantaged Communities Single-Family Affordable Solar Housing (DAC-SASH), Affordable Broadband and Lifeline, ESA, CARE, FERA, etc.)

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

Pursuant to D.20-12-003, SDG&E established the DAC-SASH program and new leveraging efforts with GRID Alternatives (GRID), including annual data sharing of customer information, which includes ESA and CARE Program information.¹⁵ In May 2022, SDG&E provided GRID with the data required in the Decision.

Additionally, GRID provides SDG&E with ESA leads received from the DAC-SASH program. As a result of discussions at the September 30, 2021, Clean Energy Workshop, SDG&E and GRID Alternatives established reoccurring monthly meetings to discuss process improvements and ways to increase leveraging opportunities. During this reporting month SDG&E received a lead list from GRID for processing for this initiative. Through July 2022, SDG&E has received 34 ESA Program leads and two enrollments resulting from this activity.

SDCWA Leveraging Effort

As part of SDG&E's leveraging agreement with San Diego County Water Authority (SDCWA), SDCWA reimburses SDG&E for water measures installed as part of the ESA Program in homes where customers have an active SDCWA account. SDG&E meets monthly with SDCWA to discuss leveraging opportunities. Additionally, SDG&E provided SDCWA information regarding measures installed in 2021 that are eligible for rebates. SDCWA has reviewed and approved the list of measures provided by SDG&E and has submitted it for final approval to its partner agency. In June, SDCWA approved four invoices for payment for 8,464 water saving measures, which totaled \$73,443.10. Reimbursement to SDG&E is pending.

California Emerging Technology Fund (CETF)

¹⁵ D.20-12-003, Appendix A, outlines the requirements for utility data sharing efforts for the DAC-SASH Program.

SDG&E launched its Cool Zone program on June 1 and continues to provide CETF information which has been added into the Cool Zone brochures and distributed to all open locations.

Power Saver Rewards Program and Smart Thermostat Program

As part of the ESA Contractor All-Hands meeting held in April, contractors were informed of SDG&E's Power Saver Rewards and Smart Thermostat A/C Saver Program. Contractors were informed of the benefits of both programs, providing event details and savings potential for customers. There were no new activities for this initiative in July.

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

SDG&E continues to partner closely with local LIHEAP agencies to improve leveraging opportunities between CSD's LIHEAP and the ESA Program. Both San Diego LIHEAP contractors, MAAC and Campesinos Unidos, continued enrollment efforts. During this reporting month, LIHEAP organizations generated 185 leads and enrolled 66 customers for the ESA Program.

1.4. Workforce Education & Training (WE&T)

1.4.1. Please summarize efforts to improve and expand ESA Program workforce education and training. Describe steps taken to hire and train low-income workers and how such efforts differ from prior program years.

During this reporting month, SDG&E did not conduct any in-person training in conjunction with Workforce Education & Training (WE&T) efforts. WE&T online courses are available for contractors via SDG&E's website and email distributions, of which contractors are informed.

In order to improve WE&T efforts, SDG&E has incorporated several questions in its ESA Program solicitation focused on contractor efforts specific to WE&T and workforce readiness. SDG&E will incorporate language and metrics in all contracts focused on improving training for low income workers. This will allow SDG&E to improve its tracking and reporting on the ESA Programs efforts to improve WE&T.

1.5. Studies and Pilots

1.5.1. ESA Program Studies

2022 Low Income Needs Assessment (LINA) Study

Southern California Edison Company is managing the contract for the current statewide LINA study. The selected consultant for the 2022 LINA is Evergreen Economics. In July 2022, the Consultant continued with in-depth interviews of tenants. A draft interim findings report was also provided to the study team for review.

Categorical Eligibility Study

The Categorical Eligibility Study will evaluate relevant means-tested public assistance programs with the aim of assessing their applicability for CARE, ESA, and FERA categorical enrollment. In June 2022, a contract was executed with Evergreen Economics to conduct the study. A project initiation meeting took place on July 14, 2022. Members of the ESA CARE Study Working Group were invited to the initiation meeting to meet the Evergreen team and ask questions about the study. A written research plan will be presented on August 31, 2022, during a stakeholder webinar.

ESA CAM Process Evaluation

Pacific Gas and Electric Company (PG&E) is leading a statewide process evaluation of the ESA CAM initiative. Resource Innovations Inc. (formerly Nexant) was selected as the

consultant. The project commenced on July 29, 2021, and is expected to be completed in September 2022. In July 2022, the Consultant provided a draft project report for review by the study team. The report will be presented during a stakeholder webinar in September.

1.5.2. ESA Program Pilot(s)

ESA Pilot Plus and Pilot Deep

SDG&E's update for this Pilot is shown above in Section 1.1.1.

2. CARE EXECUTIVE SUMMARY

2.1. CARE Program Overview

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 gas and electric bills.¹⁶ The CARE Program currently provides a 20% discount on natural gas charges and a 30-35% discount on electric rates.¹⁷ To qualify for the CARE Program, eligible customers must have a total household gross income no greater than 200% of the FPG.

On March 17, 2022, SDG&E served a Rule 16.6 Extension of Time to Comply Letter to Executive Director Rachel Peterson (March 17 Letter) for purposes of notifying the Commission that SDG&E took action to reinstate certain CARE, FERA, and MBL customers onto their respective programs as well as to request an extension of deadlines for certain CARE, FERA, and MBL recertification deadlines. As described in detail in that letter, which was served on the service list for A.19-11-003, SDG&E experienced a backlog (Backlog) in application and recertification processing due to issues with SDG&E's recent conversion to a new Customer

¹⁶ The CARE Program was later implemented by the Commission in D.89-07-062 and D.89-09-044.

¹⁷ P.U. Code Section 739.1(c)(1) mandates that "the average effective CARE discount shall not be less than 30 percent or more than 35 percent of the revenues that would have been produced for the same billed usage by non-CARE customers."

Information system (CIS). As a result of the Backlog and other related CIS issues, approximately 20,000 CARE and FERA customers fell off their respective low income program.¹⁸

SDG&E has reinstated all affected customers, including those that may be affected by these issues in the future. To that end, in addition to requesting a recertification extension for certain customers of 90 days, to up to 2 years, to address this issue fully and ensure it does not happen again, SDG&E has already extended certain customer certification deadlines and completed reinstatement of all customers who have fallen off CARE or FERA since April 5, 2021. SDG&E has adjusted the majority of customer bills to account for any eligible discounts back to the date the customer was dropped from their respective program. Pursuant to the additional requirements ordered by the Executive Director in granting SDG&E's request for an extension of time to comply, SDG&E submits a bi-weekly report to the Energy Division with updates on the back-billing corrections, amongst other items. SDG&E will continue to provide the update on a bi-weekly basis until the situation is resolved.

2.1.1. Please provide CARE Program summary costs.

CARE Program Summary for 2022			
CARE Budget Categories	Authorized Budget¹⁹	Actual Expenses to Date	% of Budget Spent
Outreach	\$ 3,237,393	\$1,215,981	38%
Proc., Certification and Verification	\$ 587,593	\$ 810,620	138%
Post Enrollment Verification	\$ 456,452	\$ 44,812	10%
Information Tech./Programming	\$ 1,080,000	\$ 171,514	16%
Pilots	\$ 0	\$ 0	0%

¹⁸ SDG&E does not go into detail regarding certain facts relevant to MBL customers in this report because they are not relevant to this proceeding. Those facts are addressed in the March 17 Letter.

¹⁹ CARE administrative budget reflects what was authorized in D.21-06-015 at 472, OP 2.

CHANGES	\$ 265,000	\$ 126,395	48%
Studies	\$ 107,719	\$ 0	0%
Regulatory Compliance	\$ 309,000	\$ 100,643	33%
General Administration	\$ 630,000	\$ 272,361	43%
CPUC Energy Division Staff	\$ 67,888	\$ 12,338	18%
Total Expenses	\$ 6,741,045	\$ 2,754,664	41%
Subsidies and Benefits ²⁰	\$ 165,211,754	\$118,266,451	72%
Total Program Costs and Discounts	\$ 171,952,799	\$121,021,115	70%

2.1.2. Provide the CARE Program enrollment rate to date.

CARE Enrollment		
Participants Enrolled ²¹	Eligible Participants ²²	Enrollment Rate
350,017	289,316	121%

²⁰ Reflects Subsidies and Benefits as authorized in SDG&E Advice Letters 3849-E and 3027-G, effective January 1, 2022.

²¹ In April 2022, SDG&E reinstated approximately 20,000 customers onto the CARE and FERA programs who had been impacted by the issues articulated in SDG&E's March 17, 2022, Rule 16.6 Extension of Time to Comply Letter to CPUC Executive Director Rachel Peterson, titled "Request for an Extension of Deadlines to Comply with California Alternative Rates for Energy, Family Electric Rate Assistance, and Medical Baseline Recertification Requirements." to Rachel Peterson, CPUC Executive Director. SDG&E's request for extension was approved on May 13, 2022.

²² On February 14, 2022, PG&E, on behalf of the IOUs, filed the Annual Estimates of CARE Eligible Customers and Related Information. This number reflects estimates of SDG&E's CARE Eligible Participants for 2022, as reflected in filing A.19-11-003, et al., Annual CARE Eligibility Estimates.

2.2. Outreach

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

Marketing and outreach efforts this month contributed to 5,066 completed CARE applications and 3,450 new enrollments/recertifications for the program. Below is a summary of CARE-specific outreach efforts.

Direct Marketing

Direct Mail

In July 2022, SDG&E resumed the monthly CARE bill comparison letters, sending 964 direct mail letters to CARE-eligible customers without an email address on file.

Email

During this reporting month, SDG&E also resumed the Bill Comparison emails, sending 49,003 emails to low income customers garnering a 51% open rate and 4.2% CTR.

Online Advertising

Since the last reporting month, SDG&E enhanced the CARE-specific digital campaign to include paid social and display advertising.

CARE Digital Advertising – July			
	Impressions	CTR	Conversions*
Paid Social	198,993	0.44%	N/A
Search	137,782	11.7%	476
Display	1,049,441	0.15%	503

*Conversions are customers who clicked from an ad through to the last page of the application and do not reflect if a customer finished the application or whether the application was accepted.

Community Outreach & Engagement

Community outreach and engagement efforts allow SDG&E to educate, connect, and directly engage with customers in communities where they work and live. Outreach and engagement activities included events, presentations, workshops, trainings, partnerships with CBOs, and customized efforts.

Tribal Outreach

As discussed in Section 1.2.1, SDG&E's Outreach and Tribal Relations teams work together to engage with the 17 Federally recognized tribes within its service territory in an ongoing initiative to educate tribes on available customer assistance programs and determine eligibility for tribal members.

CARE Partners (Capitation Agencies)

SDG&E partners with 20 social service agencies such as the Women's Infant & Children Organization (WIC) program, refugee assimilation organizations, 211 San Diego and others to help enroll its hardest-to-reach customers (collectively, Capitation Agencies).²³ These organizations serve high-risk, low income individuals and families with enrollment in state and federally funded assistance programs, including Cal Fresh, LIHEAP, Covered California, and California Lifeline. The partnering organizations are in diverse low income communities serving multicultural/multilingual, seniors, veterans, special needs, and LEP audiences and provide multilingual staffing. During this month, the following numbers were generated by the Capitation Agencies:

²³ In May 2022, three additional Energy Solutions Partners – Somali Family Services, Somali Bantu Association of America, and ElderHelp of San Diego – joined on as CARE Capitation Agencies.

Capitation Agencies	
ESA Leads	285
CARE Enrollments	103
CARE Recertifications	33
FERA Enrollments	0
FERA Recertifications	0

Women's Infant & Children Organizations (WIC)

San Diego WIC offices are open currently by appointment only. The WIC offices also continue to field questions from their clientele via telephone.

County Health and Human Service Agency Collaborative

SDG&E collaborates with the County of San Diego Health and Human Services Agency (HHSA) to connect customers to programs like CARE. All field HHSA offices include a source coded CARE application in their new client intake packets. The following applications were received this month:

HHSA	Number of Applications	YTD²⁴
ESA Leads	0	0
CARE Enrollments	35	370
CARE Recertifications	20	44
FERA Enrollments	01	2
FERA Recertifications	0	0

²⁴ Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments. For instance, in this table, a correction in CARE recertification data occurred and YTD CARE recertifications are 21 even though only 4 recertifications are reported for February and 0 were reported for January.

2.3. CARE Recertification Complaints

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

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

2.4. Pilots and Studies

2.4.1. CARE Program Studies

2022 Low Income Needs Assessment (LINA) Study

See ESA Program Section 1.5.1, which is also applicable for the CARE Program.

Categorical Eligibility Study

See ESA Program Section 1.5.1, which is also applicable for the CARE Program.

CHANGES Evaluation

PG&E is managing a statewide evaluation of the CHANGES program. The evaluation commenced on February 25, 2022, with a project initiation meeting. Opinion Dynamics is the consulting firm conducting the study. In July 2022, the Consultant finalized the research plan and presented the plan in a stakeholder webinar on July 7, 2022. Additionally, the Consultant provided draft interview guides for CBOs to the study team for review.

2.4.2. CARE Program Pilot(s)

In June 2022, SDG&E launched the CARE post-enrollment verification (PEV) Outbound Call Pilot. The Pilot will operate for six months and is aimed at contacting customers who have incorrectly provided documentation for purposes of PEV. In this reporting month, SDG&E contacted 16 customers and assisted them through the PEV process.

3. FERA EXECUTIVE SUMMARY

3.1. FERA Program Summary

The FERA Program is statutorily mandated by California P.U. Code Sections 739.1 and 739.12 to assist low to middle income-eligible households with a monthly average effective discount of 18% on their electric bills.²⁵ To qualify for the FERA Program, eligible customers consist of households with three or more persons with total annual household gross income between 200% (plus \$1) and 250% of the FPG.

3.1.1. Please provide FERA Program summary costs.

FERA Budget Categories	Authorized Budget²⁶	Actual Expenses to Date	% of Budget Spent
Outreach	\$ 361,080	\$ 73,994	20%
Proc., Certification and Verification	\$ 12,874	\$ 18,833	146%
Post Enrollment Verification	\$ 923	\$ 359	39%
Information Tech./Programming	\$ 151,500	\$ 6,764	4%
Pilot(s)	\$ 0	\$ 0	0%
Studies	\$ 50,000	\$ 0	0%
Regulatory Compliance	\$ 44,660	\$ 29,347	66%
General Administration	\$ 71,930	\$ 18,437	26%
CPUC Energy Division Staff	\$ 10,183	\$ 2,468	24%
Total Expenses	\$ 703,150	\$ 150,202	21%
Subsidies and Benefits ²⁷	\$3,711,343	\$2,408,800	65%
Total Program Costs and Discounts	\$ 4,414,493	\$2,559,002	58%

²⁵ The FERA Program was later implemented by the Commission in D.04-02-057.

²⁶ FERA budget reflects what was authorized in D.21-06-015 at 472, OP 1.

²⁷ Reflects FERA Subsidies and Benefits as authorized in SDG&E Advice Letter 3849-E, effective January 1, 2022.

3.1.2. Provide the FERA Program enrollment rate to date.

FERA Enrollment		
Participants Enrolled	Eligible Participants	Enrollment Rate
12,108	43,709	28%

3.2. Outreach

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

Marketing and outreach efforts this month contributed to 1,2454 completed FERA applications and 92 new enrollments/recertifications for the program. Below is a summary of FERA specific outreach efforts.

Direct Marketing

Direct Mail

This month, SDG&E did not send any FERA direct mail. However, SDG&E intends to leverage the success from the CARE bill comparison campaign by crafting a similar FERA specific comparison letter to be sent to potentially eligible FERA customers in Q3 2022. For customers without an email on file, the letter will compare a customer's average bill to what it would have been had the customer been enrolled in FERA.

Email

This month, SDG&E sent 10,559 FERA bill comparison emails which garnered a 60% open rate and a 7.6% click-through rate.

Online Advertising

Since the last reporting month, SDG&E launched a FERA-specific digital campaign, including paid social, search and display.

FERA Digital Advertising – July			
	Impressions	CTR	Conversions*
Paid Social	353,010	0.32%	N/A
Display	251,420	0.27%	85

*Conversions are customers who clicked from an ad through to the last page of the application and do not reflect if a customer finished the application or whether the application was accepted.

Community Outreach & Engagement

SDG&E works closely with community-based organizations and other external groups to connect customers with programs and solutions related to company offerings. SDG&E works with a network of approximately 200 community-based organizations, collectively named the Energy Solutions Partner Network, as well as other external organizations on an as needed or requested basis. SDG&E's Outreach utilizes these networks, including CARE Capitation agencies, to educate and enroll customers in eligible Customer Assistance programs. The FERA program is currently promoted in all outreach activities including events, presentations, social media messaging and trainings. SDG&E is exploring additional opportunities to promote FERA solely through targeted social media campaigns utilizing its Energy Solutions Partner Network.

Tribal Outreach

Please see Section 1.2.1, which is also applicable to the FERA Program.

FERA Partners (Capitation Agencies)

Please see Section 2.2.1, which is also applicable to the FERA Program.

3.3. FERA Recertification Complaints

3.3.1. Report the number of customer complaints received (formal or informal, however and wherever received) about their FERA recertification efforts, with the nature of the complaints and resolution.

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

3.4. Pilots and Studies

3.4.1. FERA Program Studies

Categorical Eligibility Study

See ESA Program Section 1.5.1, which is also applicable to the FERA Program.

3.4.2. FERA Program Pilot

SDG&E did not have any pilots for the FERA Program this month.

4. APPENDIX A – ESA, CARE, AND FERA PROGRAM TABLES

ESA Program Summary Expenses

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

ESA Program - Table 1A – MF In-Unit, MF CAM, MFWB, Pilot(s) and CSD

Leveraging Program Expenses

ESA Program - Table 2 - Program Expenses & Energy Savings by Measures Installed
(SF, MH, MF In-Unit)

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

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

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

ESA Program - Table 2C - Pilot Plus and Pilot Deep Program Expenses & Energy
Savings by Measures Installed

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

ESA Program - Table 3A, 3B, 3C, 3D, & 3F - Average Bill Savings per Treated Home

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

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

ESA Program - Table 6 - Expenditures for Pilots and Studies

ESA Program – Table 7 – Customer Segment Participation/Enrollments

ESA Program – Table 8 – Clean Energy Referral, Leveraging, and Coordination

ESA Program – Table 9 – Tribal Outreach

CARE Program - Table 1 - CARE Overall Program Expenses

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

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

CARE Program - Table 4 - Enrollment by County

CARE Program - Table 5 - Recertification Results

CARE Program - Table 6 - Capitation Contractors

CARE Program - Table 7 - Expenditures for Pilots and Studies

CARE Program - Table 8 - Disadvantaged Communities Enrollment Rate

CARE Program - Table 8a - Top 10 Lowest Enrollment Rates

FERA Program - Table 1 - FERA Overall Program Expenses

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

FERA Program - Table 3a & 3b - FERA Post-Enrollment Verification Results (Model & High Usage)

FERA Program - Table 4 - Enrollment by County

FERA Program - Table 5 - Recertification Results

FERA Program - Table 6 - Capitation Contractors

Energy Savings Assistance Program Table - Summary Expenses
San Diego Gas & Electric
July 2022

ESA Program:	Authorized Budget			Current Month Expenses			Year to Date Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Main Program (SF and MH) ¹			\$ 24,305,647	\$ 523,606	\$ 453,966	\$ 977,572	\$ 3,643,216	\$ 3,619,654	\$ 7,262,870			30%
ESA Multifamily In-Unit ²			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
ESA Multifamily Common Area Measures			\$ 1,600,000	\$ 194,828	\$ 46,084	\$ 240,912	\$ 377,116	\$ 211,091	\$ 588,207			37%
ESA Multifamily Whole Building ³			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
ESA Pilot Plus and Pilot Deep			\$ 1,526,683	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Building Electrification Retrofit Pilot ⁴			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Clean Energy Homes New Construction Pilot ⁴			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
CSD Leveraging			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
ESA Program TOTAL	\$ -	\$ -	\$ 27,432,330	\$ 718,434	\$ 500,050	\$ 1,218,484	\$ 4,020,331	\$ 3,830,746	\$ 7,851,077			29%

1. Budget for PY 2022 for entire portfolio, excluding MF CAM and Pilot Plus and Pilot Deep.

2. SDG&E does not account for the ESA Main Program and ESA Multifamily In-Unit costs separately and cannot provide a breakout at this level of detail. As a result, the ESA Multifamily In-Unit authorized and actual costs are included in the ESA Main Program category.

3. Implementation to occur January 2023.

4. Pilots are applicable to SCE only.

**ESA Table 1 - Main (SF, MH, MF In-Unit) Expenses
San Diego Gas & Electric
July 2022**

Appliances ESA Program:	Authorized Budget [1]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency			\$16,815,503									
Appliances			\$ -	\$ 22,621	\$ 21,748	\$ 44,370	\$ 279,679	\$ 41,516	\$ 321,195			
Domestic Hot Water			\$ -	\$ 813	\$ 26,289	\$ 27,102	\$ 14,732	\$ 476,321	\$ 491,052			
Enclosure			\$ -	\$ 47,707	\$ 63,240	\$ 110,947	\$ 500,139	\$ 662,975	\$ 1,163,114			
HVAC [2]			\$ -	\$ (334,016)	\$ 29,989	\$ (304,027)	\$ 130,175	\$ 658,642	\$ 788,817			
Maintenance			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Lighting [2]			\$ -	\$ 483,919	\$ -	\$ 483,919	\$ 830,187	\$ -	\$ 830,187			
Miscellaneous [3]			\$ -	\$ (10,140)	\$ -	\$ (10,140)	\$ 108,103	\$ -	\$ 108,103			
Customer Enrollment			\$ -	\$ 110,611	\$ 110,611	\$ 221,223	\$ 651,303	\$ 651,303	\$ 1,302,605			
In Home Education			\$ -	\$ 100,918	\$ 100,918	\$ 201,837	\$ 191,158	\$ 191,158	\$ 382,316			
ESA Pilot Plus and Pilot Deep			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Energy Efficiency TOTAL	\$ -	\$ -	\$ 16,815,503	\$ 422,435	\$ 352,796	\$ 775,231	\$ 2,705,475	\$ 2,681,915	\$ 5,387,390			32%
Training Center			\$ 337,201	\$ -	\$ -	\$ -	\$ 6,640	\$ 6,640	\$ 13,279			4%
Workforce Education and Training			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Inspections			\$ 162,981	\$ 7,516	\$ 7,516	\$ 15,031	\$ 40,055	\$ 40,055	\$ 80,110			49%
Marketing and Outreach			\$ 1,069,140	\$ 27,716	\$ 27,716	\$ 55,433	\$ 202,912	\$ 202,912	\$ 405,823			38%
Studies			\$ 162,500	\$ 4,213	\$ 4,213	\$ 8,425	\$ 33,169	\$ 33,169	\$ 66,339			41%
Regulatory Compliance			\$ 294,680	\$ 11,271	\$ 11,271	\$ 22,543	\$ 74,313	\$ 74,313	\$ 148,627			50%
General Administration			\$ 5,104,453	\$ 49,474	\$ 49,474	\$ 98,948	\$ 566,137	\$ 566,137	\$ 1,132,274			22%
CPUC Energy Division			\$ 53,113	\$ -	\$ -	\$ -	\$ 4,935	\$ 4,935	\$ 9,870			19%
SPOC			\$ 306,076	\$ 981	\$ 981	\$ 1,961	\$ 9,578	\$ 9,578	\$ 19,157			6%
Administration Subtotal	\$ -	\$ -	\$ 7,490,144	\$ 101,171	\$ 101,170	\$ 202,341	\$ 937,740	\$ 937,739	\$ 1,875,480			25%
TOTAL PROGRAM COSTS	\$ -	\$ -	\$ 24,305,647	\$ 523,606	\$ 453,966	\$ 977,572	\$ 3,643,216	\$ 3,619,654	\$ 7,262,870			30%
Indirect Costs				\$ 47,931	\$ 46,684	\$ 94,615	\$ 349,510	\$ 348,410	\$ 697,920			
NGAT Costs		\$200,000	\$ 200,000		\$ 17,257	\$ 17,257		\$ 59,362	\$ 59,362		30%	30%

1. Budget authorized in D.21.06.015, Attachment 1 Table 11.

2. Negative amount in HVAC budget category is due to the corrections completed in the EECF system configuration to update the budget category being charged. Previously, light bulbs were being charged to the budget category HVAC but should have been charged to the budget category Lighting.

3. Negative amount in Miscellaneous budget category is primarily related to the reversal of prior month accruals and true-up of estimate provided by the vendor.

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

**ESA Table 1A - MF In-Unit, MF CAM, and MFWB Expenses
San Diego Gas & Electric
July 2022**

ESA Program (Multifamily):	Authorized Budget			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Multifamily In-Unit ¹			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
ESA Multifamily Common Area Measures 2			\$ 1,600,000	\$ 194,828	\$ 46,084	\$ 240,912	\$ 377,116	\$ 211,091	\$ 588,207			37%
ESA Multifamily Whole Building ³			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
ESA Program (Multifamily) TOTAL	\$ -	\$ -	\$ 1,600,000	\$ 194,828	\$ 46,084	\$ 240,912	\$ 377,116	\$ 211,091	\$ 588,207			37%

1. Budget is included in ESA Main Program.

2. See Table 2 of SDG&E Advice Letter 3820-E/3004-G for 2022 MF CAM budget, which was approved by the Commission's Energy Division via disposition letter dated September 24, 2021.

3. Implementation to occur January 2023.

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

	Authorized Budget [1] [2]			Current Month Expenses [4]			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Pilot Plus and Pilot Deep Program			\$1,526,683	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ 1,526,683	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%

ESA Table 1A-2 - Building Electrification Expenses³

	Authorized Budget [1] [2]			Current Month Expenses [4]			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Building Electrification Program			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%

3. Pilots is applicable to SCE only.

ESA Table 1A-3 - Clean Energy Homes Expenses³

	Authorized Budget [1] [2]			Current Month Expenses [4]			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Clean Energy Homes Program			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%

3. Pilots is applicable to SCE only.

ESA Table 1A-4 - Leveraging - CSD Expenses

	Authorized Budget [1] [2]			Current Month Expenses [4]			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Program Leveraging - CSD			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%

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

Energy Savings Assistance Common Area Measures Program Table 2B
San Diego Gas & Electric
July 2022

Table 2B ESA Program - Multifamily Common Area Measures ⁵								
		Year-To-Date Completed & Expensed Installation						
	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
ESA CAM Measures[1]								
Appliances								
Domestic Hot Water								
Central Boiler**	Cap-kBTUh	607	-	-	-	1,894	\$ 119,098	
Faucet Aerator	Each	-	-	-	-	-	\$ -	
Pipe Insulation	Home	-	-	-	-	-	\$ -	
Envelope								
HVAC								
AC Tune-up**	Cap-Tons	-	-	-	-	-	\$ -	
Furnace Replacement**	Cap-kBTUh	-	-	-	-	-	\$ -	
HEAT Pump Split System**	Cap-Tons	-	-	-	-	-	\$ -	
HEAT Pump Split System	Each	-	-	-	-	-	\$ -	
Programmable Thermostat	Each	-	-	-	-	-	\$ -	
Lighting								
Exterior LED Lighting	Fixture	87		5,215	-	-	17,962	
Exterior LED Lighting - Pool	Lamp							
Interior LED Exit Sign	Fixture							
Interior LED Fixture	Fixture	221		41,810	10	(113)	\$ 36,335	
Interior LED Lighting	Lamp							
Interior LED Screw-in	Lamp	41		139	0	(0)	\$ 437	
Interior TLED Type A Lamps	Lamp							
Interior TLED Type C Lamps	Lamp	192		7,218	2	(42)	\$ 6,629	
Miscellaneous								
Tier-2 Smart Power Strip	Each	-	-	-	-	-	\$ -	
Variable Speed Pool Pump	Each	-	-	-	-	-	\$ -	
Ancillary Services								
Audit ⁴		8	-	-	-	-	\$ 14,179	
Total	-	1,156	-	54,383	12	1,738	\$ 194,640	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated ⁴	8
Subtotal of Master-metered Multifamily Properties Treated	6
Total Number of Multifamily Tenant Units w/in Properties Treated ⁵	770
Total Number of buildings w/in Properties Treated	58

ESA Program - Multifamily Common Area	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ 20,180	\$ 20,180	\$ 40,360
Direct Implementation (Non-Incentive)	\$ 183,693	\$ 183,693	\$ 367,386
Direct Implementation	\$ 173,243	\$ 7,218	\$ 180,461
TOTAL MF CAM COSTS	\$ 377,116	\$ 211,091	\$ 588,207

[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: PY2015 to 2017 ESA Impact Evaluation and Statewide Measure Packages approved in the CA eTRM.

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

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

[6] Includes addition of \$2.3K incorrectly reported in Direct Implementation (Non-Incentive) in February 2022.

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

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

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

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

**Energy Savings Assistance CAM Program Table 2B-1, Eligible Common Area Measures
List
San Diego Gas & Electric
July 2022**

Common Area Measures Category and Eligible Measures Title [1]	Effective Date	End Date[2]	Eligible Climate Zones [3]
Appliances			
Domestic Hot Water			
Pipe Insulation	5/18/2020		6, 7, 8, 10, 14, 15
Faucet Aerator	5/18/2020		6, 7, 8, 10, 14, 15
Central Boiler	5/18/2020		6, 7, 8, 10, 14, 16
Envelope			
HVAC			
AC Tune-up	5/18/2020		6, 7, 8, 10, 14, 15
Furnace Replacement	5/18/2020		6, 7, 8, 10, 14, 15
HEAT Pump Split System	5/18/2020		6, 7, 8, 10, 14, 15
HEAT Pump Split System	5/18/2020		6, 7, 8, 10, 14, 15
Programmable Thermostat	5/18/2020		6, 7, 8, 10, 14, 15
Lighting			
Exterior LED Lighting	5/18/2020		6, 7, 8, 10, 14, 15
Interior LED Lighting	5/18/2020		6, 7, 8, 10, 14, 15
Interior TLED Type A Lamps	5/18/2020		6, 7, 8, 10, 14, 15
Interior TLED Type C Lamps	5/18/2020		6, 7, 8, 10, 14, 15
Interior LED Exit Sign	5/18/2020		6, 7, 8, 10, 14, 15
Interior LED Fixture	5/18/2020		6, 7, 8, 10, 14, 15
Interior LED Screw-in	5/18/2020		6, 7, 8, 10, 14, 15
Exterior LED Lighting - Pool	5/18/2020		6, 7, 8, 10, 14, 15
Miscellaneous			
Tier-2 Smart Power Strip	5/18/2020		6, 7, 8, 10, 14, 15
Variable Speed Pool Pump	5/18/2020		6, 7, 8, 10, 14, 15

Standard Notes (do not delete)

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

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

2. Only complete if measure is canceled or discontinued

3. Defined as CEC California Building Climate Zones

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

Energy Savings Assistance Program Table 2C Pilot Plus and Pilot Deep
San Diego Gas & Electric
July 2022

Measures	Units	ESA Program - Pilot Plus					
		Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances							
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water							
	Home	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Enclosure[1]							
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
HVAC							
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
Maintenance							
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
Lighting							
	Each					\$ -	0.0%
	Each					\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Miscellaneous							
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Customer Enrollment							
ESA Outreach & Assessment	Home	-				\$ -	0.0%
ESA In-Home Energy Education	Home	-				\$ -	0.0%
Total Savings/Expenditures			-	-	-	\$ -	0.0%
Households Treated		Total					
- Single Family Households Treated	Home						
- Mobile Homes Treated	Home						
Total Number of Households Treated	Home						

Measures	Units	ESA Program - Pilot Deep					
		Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances							
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water							
	Home	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Enclosure[1]							
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
HVAC							
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
Maintenance							
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
Lighting							
	Each					\$ -	0.0%
	Each					\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Miscellaneous							
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Customer Enrollment							
ESA Outreach & Assessment	Home	-				\$ -	0.0%
ESA In-Home Energy Education	Home	-				\$ -	0.0%
Total Savings/Expenditures			-	-	-	\$ -	0.0%
Households Treated		Total					
- Single Family Households Treated	Home						
- Mobile Homes Treated	Home						
Total Number of Households Treated	Home						

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may
Note: IOUs - If there are new measures that are approved through the ESA Working Group, mark in column A as such to indicate that it is a new measure.
Note: SDG&E's Pilot Plus/Pilot Deep will launch in mid-2023.

Energy Savings Assistance Program Table 2D Pilots (SCE ONLY)
San Diego Gas & Electric
July 2022

ESA Program - Building Electrification Retrofit Pilot								ESA Program - Clean Energy Homes New Construction Pilot							
Measures	Units	Year-To-Date Completed & Expensed Installation						Measures	Units	Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure			Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances								Appliances							
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water								Domestic Hot Water							
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Enclosure[1]								Enclosure[1]							
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
HVAC								HVAC							
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
Maintenance								Maintenance							
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
Lighting								Lighting							
	Each					\$ -	0.0%		Each					\$ -	0.0%
	Each					\$ -	0.0%		Each					\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Miscellaneous								Miscellaneous							
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Customer Enrollment								Customer Enrollment							
ESA Outreach & Assessment	Home	-				\$ -	0.0%	ESA Outreach & Assessment	Home	-				\$ -	0.0%
ESA In-Home Energy Education	Home	-				\$ -	0.0%	ESA In-Home Energy Education	Home	-				\$ -	0.0%
Total Savings/Expenditures			-	-	-	\$ -	0.0%	Total Savings/Expenditures			-	-	-	\$ -	0.0%
Households Treated	Total							Households Treated	Total						
- Single Family Households Treated	Home							- Single Family Households Treated	Home						
- Mobile Homes Treated	Home							- Mobile Homes Treated	Home						
Total Number of Households Treated	Home							Total Number of Households Treated	Home						

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

Energy Savings Assistance Program Tables 3A-F - Energy Savings and Average Bill Savings per Treated Home/Common Area
San Diego Gas & Electric
July 2022

Table 3A, ESA Program (SF, MH, MF In-Unit)	
Annual kWh Savings	526,731
Annual Therm Savings	9,396
Lifecycle kWh Savings	5,571,827
Lifecycle Therm Savings	(16,486)
Current kWh Rate	\$ 0.19
Current Therm Rate	\$ 1.12
Average 1st Year Bill Savings / Treated households	\$ 19.13
Average Lifecycle Bill Savings / Treated Household	\$ 179.53

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

Table 3C, ESA Program - Multifamily Common Area	
Annual kWh Savings	54,383
Annual Therm Savings	1,738
Lifecycle kWh Savings	452,955
Lifecycle Therm Savings	36,478
Current kWh Rate	\$ 0.19
Current Therm Rate	\$ 1.12
Average 1st Year Bill Savings / Treated Property	\$ 1,508.35
Average Lifecycle Bill Savings / Treated Property	\$ 15,632.98

Table 3D, ESA Program - Pilot Plus ²	
Annual kWh Savings	-
Annual Therm Savings	-
Lifecycle kWh Savings	-
Lifecycle Therm Savings	-
Current kWh Rate	\$ -
Current Therm Rate	\$ -
Average 1st Year Bill Savings / Treated Property	\$ -
Average Lifecycle Bill Savings / Treated Property	\$ -

Table 3E, ESA Program - Pilot Deep ²	
Annual kWh Savings	-
Annual Therm Savings	-
Lifecycle kWh Savings	-
Lifecycle Therm Savings	-
Current kWh Rate	\$ -
Current Therm Rate	\$ -
Average 1st Year Bill Savings / Treated Property	\$ -
Average Lifecycle Bill Savings / Treated Property	\$ -

Table 3F, Summary - ESA Program (SF, MH, MF In-Unit)/CSD Leveraging/MF CAM/Pilot Plus and Pilot Deep ¹	
Annual kWh Savings	581,114
Annual Therm Savings	11,133
Lifecycle kWh Savings	6,024,782
Lifecycle Therm Savings	19,992
Current kWh Rate	\$ 0.37
Current Therm Rate	\$ 2.23
Average 1st Year Bill Savings / Treated Households	\$ 1,527.48
Average Lifecycle Bill Savings / Treated Households	\$ 15,812.52

- Summary is the sum of ESA Program + CSD Leveraging + MF CAM + Pilot Plus + Pilot Deep
- SDG&E's Pilot Plus/Pilot Deep will launch in mid-2023

**Energy Savings Assistance Program Table 4 - Homes/Buildings Treated
San Diego Gas & Electric
July 2022**

Table 4A, ESA Program (SF, MH, MF In-Unit)						
	Eligible Households			Households Treated YTD		
County	Rural [1]	Urban	Total	Rural	Urban	Total
Orange		21,423	21,423		19	19
San Diego	8,611	343,665	352,276	92	5,432	5,524
Total	8,611	365,088	373,699	92	5,451	5,543

Table 4B, ESA Program - CSD Leveraging						
	Eligible Households			Households Treated YTD		
County	Rural [1]	Urban	Total	Rural	Urban	Total
Orange			0			0
San Diego			0			0
Total	0	0	0	0	0	0

Table 4C, ESA Program - Multifamily Common Area						
	Eligible Properties [2]			Properties Treated YTD		
				Rural	Urban	Total
Orange	-	-	-	-	-	-
San Diego	-	-	-	-	8	8
Total					8	8

Table 4D, ESA Program - Pilot Plus and Pilot Deep						
	Eligible Households			Households Treated YTD		
	Rural [1]	Urban	Total	Rural	Urban	Total
Orange	-	-	-	-	-	-
San Diego	-	-	-	-	-	-
Total					0	0

[1] For IOU low income-related and Energy Efficiency reporting and analysis, the Goldsmith definition is applied.

[2] Do not currently have Eligible Properties for ESA CAM.

Energy Savings Assistance Program Table 5 - Energy Savings Assistance Program Customer Summary
San Diego Gas & Electric
July 2022

Table 5A, ESA Program (SF,MH, MF In-Unit)																
Month	Gas & Electric				Gas Only				Electric Only				Total			
	# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January	-	440	6,726	1	-	-	-	-	-	1,411	0	-	440	8,137	-	
February	65	1,800	21,388	3	-	-	-	-	-	1,572	0	65	1,800	22,961	-	
March	164	1,115	48,941	6	-	-	-	-	7	4,265	1	171	1,115	53,206	7	
April	1,287	399	103,315	14	-	-	-	-	79	9,940	1	1,366	399	113,255	15	
May	1,852	2,875	152,365	20	-	-	-	-	188	20,098	3	2,040	2,875	172,463	22	
June	1,020	1,797	89,686	12	-	-	-	-	90	9,969	1	1,110	1,797	99,654	13	
July	740	970	50,425	7	-	-	-	-	51	6,629	1	791	970	57,054	8	
August	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
September	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
October	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
November	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
December	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
YTD	5,128	9,396	472,846	62	-	-	-	-	415	-	53,885	7	5,543	9,396	526,731	

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

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

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

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

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

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

Table 5C, ESA Program - Multifamily Common Area																
Month	Gas & Electric				Gas Only				Electric Only				Total			
	# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-	2	2,208	0	2	-	2,208	-	0
March	1	(31)	10,608	2	-	-	-	-	-	0	0	1	(31)	10,608	2	2
April	1	(7)	677	0	-	-	-	-	1	2,867.28	0.42	2	(7)	3,544	1	1
May	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
July	2	1,775	34,475	8	-	-	-	-	1	3,548	1	3	1,775	38,023	9	9
August																
September																
October																
November																
December																
YTD	4	1,738	45,760	10	-	-	-	-	4	-	8,623	2	8	1,738	54,383	12

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

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

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

**Energy Savings Assistance Program Table 6 - Expenditures for Pilots and Studies
San Diego Gas & Electric
July 2022**

	Authorized 2021-26 Funding			Current Month Expenses			Year to Date Expenses			Cycle to Date Expenses			% of Budget Expended		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots															
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				0%	0%	0%
Total Pilots	\$ -	\$ -	\$ -			\$ -			\$ -				0%	0%	0%
Studies															
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study	\$ -	\$ -	\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				0%	0%	0%
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study	\$ -	\$ -	\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				0%	0%	0%
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study	\$ -	\$ -	\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				0%	0%	0%
Joint IOU - Statewide CARE-ESA Categorical Study	\$ -	\$ -	\$ 11,250	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				0%	0%	0%
Load Impact Evaluation Study	\$ -	\$ -	\$ 225,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				0%	0%	0%
Equity Criteria and Non Energy Benefits Evaluation (NEB's)	\$ -	\$ -	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				0%	0%	0%
Rapid Feedback Research and Analysis	\$ -	\$ -	\$ 300,000	\$ 4,213	\$ 4,213	\$ 8,425	\$ 33,169	\$ 33,169	\$ 66,339	\$ 33,169	\$ 33,169	\$ 66,339			22%
Joint IOU - Multifamily CAM Process Evaluation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				0%	0%	0%
Joint IOU - Process Evaluation Studies (1-4 Studies)	\$ -	\$ -	\$ 75,000												
Total Studies	\$ -	\$ -	\$ 798,750	\$ 4,213	\$ 4,213	\$ 8,425	\$ 33,169	\$ 33,169	\$ 66,339	\$ 33,169	\$ 33,169	\$ 66,339	0%	0%	8%

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

Energy Savings Assistance Program Table - 7 Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions

San Diego Gas & Electric
July 2022

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

Customer Segments	# of Households Eligible [1]	# of Households Treated [2]	Enrollment Rate = (C/B)	# of Households Contacted [3]	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households	Avg. Energy Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households	Avg. Cost Per Treated Households
Demographic									
Housing Type									
SF	170,622	2,172	1%	2,427	89%	27.22	0.004	-0.302	\$ 306
MH	22,468	407	2%	589	69%	42.80	0.005	4.515	\$ 425
MF In-Unit	179,480	2,964	2%	3,510	84%	31.53	0.004	0.260	\$ 261
Rent vs. Own									
Own	136,885	1,428	1%	8,822	16%	30.34	0.004	0.838	\$ 370
Rent	236,613	4,115	2%	25,653	16%	31.31	0.004	0.289	\$ 248
Previous vs. New Participant									
Previous	N/A	3,990	0%	N/A	0%	31.96	0.004	0.458	\$ 333
New Participant	N/A	1,553	0%	N/A	0%	28.65	0.004	0.731	\$ 252
Seniors	166,246	966	1%	N/A	0%	27.19	0.003	1.307	\$ 310
Veterans [4]	44,771	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A
Hard-to-Reach [5]	N/A	68	0%	N/A	0%	42.590	0.006	0.190	\$ 149
Vulnerable [6]	N/A	2,251	0%	15,528	14%	29.926	0.004	0.474	\$ 321
Location									
DAC	90,092	1,349	1%	8,522	16%	31.097	0.004	0.366	\$ 333
Rural	8,611	92	1%	1,488	6%	31.332	0.004	0.390	\$ 213
Tribal	21,716	31	0%	806	4%	39.735	0.005	-0.350	\$ 188
PSFS Zone	N/A	33	0%	830	4%	37.923	0.005	0.787	\$ 210
Wildfire Zone [15]	N/A	260	0%	5,734	5%	30.229	0.004	0.526	\$ 211
Climate Zone 6	16,775	17	0%	1,856	1%	59.658	0.008	-0.028	\$ 187
Climate Zone 7	244,028	3,737	2%	44,594	8%	29.589	0.004	0.258	\$ 303
Climate Zone 8	4,649	2	0%	545	0%	35.393	0.005	0.000	\$ 153
Climate Zone 10	99,636	1,770	2%	19,425	9%	32.379	0.004	1.116	\$ 315
Climate Zone 14	3,490	14	0%	406	3%	60.596	0.007	0.000	\$ 206
Climate Zone 15	1,084	3	0%	69	4%	53.291	0.007	-0.042	\$ 199
CARB Communities [7]	293,479	989	0%	6,328	16%	33.532	0.004	0.726	\$ 359
Financial									
CARE	289,316	5,182	2%	65,136	8%	29.633	0.004	0.239	\$ 296
FERA	43,709	20	0%	256	8%	8.516	0.001	-0.249	\$ 180
Disconnected [8]	0	-	0%		0%	0.000	0.000	0.000	\$ -
Arrearages [9]	N/A	2,382	0%	23,717	10%	31.824	0.004	0.331	\$ 260
High Usage [10]	N/A		0%		0%				
High Energy Burden [11]	132,033	1,129	1%	8,500	13%	29.617	0.004	0.572	\$ 298
SEVI [12]									
Low	N/A	585	0%	13,814	4%	35.754	0.005	0.139	\$ 285
Medium	N/A	1,491	0%	24,282	6%	32.826	0.004	0.682	\$ 316
High	N/A	3,443	0%	28,422	12%	28.300	0.004	0.564	\$ 306
Affordability Ratio [13]	N/A	579	0%	5,733	10%	23.279	0.003	0.153	\$ 203
Health Condition									
Medical Baseline	N/A	359	0%	3,591	10%	20.479	0.003	0.246	\$ 226
Respiratory [14]									
Low	283,333	1,705	1%	28,814	6%	35.671	0.005	0.711	\$ 301
Medium	195,497	1,811	1%	21,574	8%	27.680	0.004	0.509	\$ 297
High	113,026	2,003	2%	16,030	12%	28.811	0.004	0.385	\$ 322
Disabled	115,907	406	0%	N/A	0%	27.006	0.003	1.157	\$ 266

Note:

N/A - Not Available

[1] Eligible household counts by segment provided by Athens. Segments with no data will be calculated internally at a later date.

[2] Households Treated data is not additive because customers may be represented in multiple categories.

[3] Includes only households that SDG&E contacted by direct mail or email campaigns for CY2022.

[4] Data for this segment is currently not being captured. Database/forms will be updated to collect this data, effective 2023.

[5] "Hard to Reach" is defined as a customer who meets at least one of the following characteristics: Prefers non-English language, is low income, lives in a mobile home or multifamily dwelling unit, is a renter/tenant, or is Rural.

[6] Vulnerable is defined as Disadvantaged Vulnerable Communities (DVC) which consists of communities in the 25% highest scoring census tracts according to the most current versions of the 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.

[7] Utilizing AB617 Communities identified by CARB's Community Air Protection Program (CAPP)

[8] Due to the COVID customer protections, no customers have been disconnected since March 4, 2020.

[9] SDG&E defines arrearages as overdue balance greater than 30 days.

[10] SDG&E defines high usage as at least 400% with in 12-month period prior to the enrollment date.

[11] 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 inPG&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).

[12] 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: 3.238 to 35.551; M: >35.552 to 59.566; H: >59.567).

[13] Utilizing AR20 data, census tracts with Electric AR20 above 15% and Gas AR20 above 10% were selected. Threshold based on CPUC 2019 Annual Affordability Report.

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

[15] Includes Zone 3 (Tier 3) of the CPUC Fire-Threat Map

Pilot Plus and Pilot Deep

Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Enrollment Rate = (C/E)	Avg. Energy Savings (kWh) Per Treated Households	Avg. Energy Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households	Avg. Cost Per Treated Households
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%				
PSFS Zone			0%		0%				
Wildfire Zone			0%		0%				
Climate Zone 7 (example)			0%		0%				
Climate Zone 10 (example)			0%		0%				
Climate Zone 14 (example)			0%		0%				
Climate Zone 15 (example)			0%		0%				
CARB Communities			0%		0%				
Financial									
CARE			0%		0%				
Disconnected			0%		0%				
Arrearages			0%		0%				
High Usage			0%		0%				
High Energy Burden			0%		0%				
SEVI			0%		0%				
Affordability Ratio			0%		0%				
Health Condition									
Medical Baseline			0%		0%				
Respiratory			0%		0%				
Disabled			0%		0%				

Note: No data available at this time.

Energy Savings Assistance Program Table - 8 Clean Energy Referral, Leveraging, and Coordination

San Diego Gas & Electric

July 2022

Partner	Brief Description of Effort	# of Referral	# of Leveraging	# of Coordination Efforts	# of Leads	# of Enrollments
LIHEAP	LIHEAP agencies in SDG&E service territory leverage LIHEAP payment leads to provide ESA Program services to customers.			N/A		
CSD						
SASH						
SDCWA						
CARE/Medical Baseline						
CARE High Usage	Leads generated through CARE HEU income verifications completed			N/A		
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*	36	150	0	0
CARE Capitation Agencies	SDG&E partners with 20 social service agencies to help enroll its hardest-to-reach customers in Customer Assistance programs.	N/A*	5	7	285	2

Note to IOUs:

Leveraging activities would include when programs share resources to jointly support program delivery or administration.

While coordination refers more generally to program communication, collaboration, and alignment of activities to support individual program delivery.

*SDG&E considers referrals and leads the same, therefore, this data is captured under column "F"

** SDG&E does not track these ESA efforts individually, but as a whole "Customer Assistance" effort.

Energy Savings Assistance Program Table - 9 Tribal Outreach

**San Diego Gas & Electric
July 2022**

OUTREACH STATUS	Quantity (Includes CARE, FERA, and ESA)***	List of Participating Tribes
Tribes completed ESA Meet & Confer	12	Barona, Jamul Indian Village, Pauma Band, Rincon, Ewilaapaayap, Sycuan Band of Kumeyaay Nation, Viejas Band of Kumeyaay Indians, La Posta, Mesa Grande, Manzanita, Campo Kumeyaay Nation, Santa Ysabel
Tribes requested outreach materials or applications	4	Pauma Band, La Posta, Mesa Grande, Santa Ysabel
Tribes who have not accepted offer to Meet and Confer	5	San Pasqual, Inaja & Cosmit, La Jolla, Pala Band, Los Coyotes
Non-Federally Recognized Tribes who participated in Meet & Confer	N/A	N/A
Tribes and Housing Authority sites involved in Focused Project/ESA	N/A	N/A
Partnership offer on Tribal Lands	N/A	N/A
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	2	Southern California American Indian Resource Center (SCAIR); Southern California Tribal Chairmen's Association (SCTCA)
Housing Authority and TANF offices who participated in Meet and Confer	N/A	N/A

*SDG&E has invited all 17 tribes to meet and confer and will continue to engage throughout 2022.
 **SDG&E provides TANF related messaging through periodic presentations to SCAIR and SCTCA
 ***Numbers are a rolling count of Tribal Outreach efforts

**CARE Table 1 - CARE Program Expenses
San Diego Gas & Electric
July 2022**

CARE Program:	Authorized Budget [1]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Outreach	\$ 2,848,906	\$ 388,487	\$ 3,237,393	\$ 130,692	\$ 16,156	\$ 146,848	\$ 1,081,222	\$ 134,759	\$ 1,215,981	38%	35%	38%
Processing / Certification Re-certification	\$ 517,082	\$ 70,511	\$ 587,593	\$ 106,872	\$ 13,211	\$ 120,083	\$ 720,757	\$ 89,863	\$ 810,620	139%	127%	138%
Post Enrollment Verification	\$ 401,678	\$ 54,774	\$ 456,452	\$ 5,270	\$ 652	\$ 5,922	\$ 39,852	\$ 4,960	\$ 44,812	10%	9%	10%
IT Programming	\$ 950,400	\$ 129,600	\$ 1,080,000	\$ 18,493	\$ 2,286	\$ 20,779	\$ 152,555	\$ 18,959	\$ 171,514	16%	15%	16%
Pilots	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
CHANGES Program	\$ 233,200	\$ 31,800	\$ 265,000	\$ 15,156	\$ 1,873	\$ 17,029	\$ 112,304	\$ 14,091	\$ 126,395	48%	44%	48%
Studies	\$ 94,793	\$ 12,926	\$ 107,719	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance	\$ 271,920	\$ 37,080	\$ 309,000	\$ 14,479	\$ 1,790	\$ 16,269	\$ 89,440	\$ 11,203	\$ 100,643	33%	30%	33%
General Administration	\$ 554,400	\$ 75,600	\$ 630,000	\$ 20,381	\$ 2,519	\$ 22,900	\$ 242,042	\$ 30,319	\$ 272,361	44%	40%	43%
CPUC Energy Division	\$ 59,741	\$ 8,147	\$ 67,888	\$ -	\$ -	\$ -	\$ 10,980	\$ 1,358	\$ 12,338	18%	17%	18%
SUBTOTAL MANAGEMENT COSTS	\$ 5,932,120	\$ 808,925	\$ 6,741,045	\$ 311,343	\$ 38,487	\$ 349,830	\$ 2,449,152	\$ 305,512	\$ 2,754,664	41%	38%	41%
CARE Rate Discount [2]	\$ 139,598,682	\$ 25,613,072	\$ 165,211,754	\$ 18,506,386	\$ 1,368,131	\$ 19,874,517	\$ 103,897,111	\$ 14,369,340	\$ 118,266,451	74%	56%	72%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 145,530,802	\$ 26,421,997	\$ 171,952,799	\$ 18,817,729	\$ 1,406,618	\$ 20,224,347	\$ 106,346,263	\$ 14,674,852	\$ 121,021,115	73%	56%	70%
Other CARE Rate Benefits												
- Wildfire Non-Bypassable Charge Exemption [3]				\$ 724,838	\$ -	\$ 724,838	\$ 4,948,230		\$ 4,948,230			
- CARE Surcharge Exemption				\$ 1,172,944	\$ 167,504	\$ 1,340,448	\$ 8,084,147	\$ 1,928,565	\$ 10,012,712			
- California Solar Initiative Exemption				\$ -	\$ -	\$ -	\$ -		\$ -			
- kWh Surcharge Exemption				\$ 101,118	\$ -	\$ 101,118	\$ 643,837		\$ 643,837			
- Vehicle Grid Integration Exemption				\$ 86,892	\$ -	\$ 86,892	\$ 536,965		\$ 536,965			
Total Other CARE Rate Benefits				\$ 2,085,792	\$ 167,504	\$ 2,253,296	\$ 14,213,179	\$ 1,928,565	\$ 16,141,744			
Indirect Costs				\$ 72,047	\$ 8,906	\$ 80,953	\$ 589,023	\$ 73,631	\$ 662,654			

1. Budget authorized in D.21.06.015, Attachment 1 Table 2.

2. CARE Rate Discount amounts reflected in Advice Letters 3849-E and 3027-G-A, effective January 1st, 2022.

3. SDG&E Advice Letter 3619-E authorizes Wildfire Non-Bypassable Charge Exemption, effective October 1, 2020.

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

CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration
San Diego Gas & Electric
July 2022

	New Enrollment										Recertification ⁷				Attrition (Drop Offs) ^{7, 8}					Enrollment		Total CARE Participants	Estimated CARE Eligible	Enrollment ⁵ Rate % (W/X)	Total Residential Accounts ⁶	Gas Only	Electric Only
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)						
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																		
January	-	12	-	12	5,811	1,317	421	182	7,731	7,743	2,338	5,217	397	7,952	3,236	1	149	167	3,553	15,695	4,190	324,863	289,316	112%	1,385,862	-	135,859
February	-	2	-	2	6,213	538	659	190	7,600	7,602	2,380	4,586	121	7,087	3,378	-	103	2,119	5,600	14,689	2,002	326,865	289,316	113%	1,386,791	-	136,319
March	-	2	-	2	6,064	509	574	165	7,312	7,314	1,236	4,284	4	5,524	4,354	1	34	2,264	6,653	12,838	661	327,526	289,316	113%	1,387,643	-	136,298
April	-	27	-	27	4,083	444	227	165	4,919	4,946	170	3,369	5	3,544	355	-	2	(13,616)	(13,259)	8,490	18,205	345,731	289,316	119%	1,388,207	-	142,934
May	-	48	-	48	4,606	557	313	117	5,593	5,641	53	3,660	5	3,718	289	-	4	4,767	5,060	9,359	581	346,312	289,316	120%	1,389,013	-	143,202
June	1	25	-	26	4,638	431	297	139	5,505	5,531	57	3,144	7	3,208	250	-	1	3,418	3,669	8,739	1,862	348,174	289,316	120%	1,390,123	-	143,887
July	-	17	-	17	4,985	256	219	103	5,563	5,580	1,553	3,685	17	5,255	375	1	10	3,351	3,737	10,835	1,843	350,017	289,316	121%	1,390,995	-	144,398
August	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	289,316	-	-	-	-
September	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	289,316	-	-	-	-
October	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	289,316	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	289,316	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	289,316	-	-	-	-
YTD Total	1	133	-	134	36,400	4,052	2,710	1,061	44,223	44,357	7,787	27,945	556	36,288	12,237	3	303	2,470	15,013	80,645	29,344	350,017	289,316	121%	1,390,995	-	144,398

¹ Enrollments via data sharing between the IOUs.

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

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

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

⁵ Penetration Rate and Enrollment Rate are the same value.

⁶ Data represents total residential electric customers.

⁷ SDG&E continues to analyze its data for changes to customer totals due to a processing backlog and potential data discrepancies currently under review.

⁸ In April 2022, SDG&E reinstated approximately 20,000 customers onto the CARE and FERA programs who had been impacted by the issues articulated SDG&E's March 17, 2022 "Request for an Extension of Deadlines to Comply with California Alternative Rates for Energy, Family Electric Rate Assistance, and Medical Baseline Recertification Requirements.

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

CARE Table 3A - Post-Enrollment Verification Results (Model)
San Diego Gas & Electric
July 2022

Month	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible)	Total Households De-enrolled	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-enrolled
January	324,863	7	0.0%	2	-	2	29%	0%
February	326,865	12	0.0%	4	-	4	33%	0%
March	327,526	5	0.0%	4	-	4	80%	0%
April	345,731	4	0.0%	2	-	2	50%	0%
May	346,312	2	0.0%	0	-	-	0%	0%
June	348,174	805	0.2%	0	7	7	1%	0%
July	350,017	2,127	0.6%	0	6	6	0%	0%
August								
September								
October								
November								
December								
YTD Total	350,017	2,962	0.8%	12	13	25	0.8%	0.0%

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

CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)
San Diego Gas & Electric
July 2022

Month	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible)	Total Households De-enrolled	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-enrolled
January	324,863	1,961	0.6%	1734	15	1,749	89.2%	0.5%
February	326,865	383	0.1%	271	5	276	72.1%	0.1%
March	327,526	381	0.1%	231	3	234	61.4%	0.1%
April	345,731	220	0.1%	157	4	161	73.2%	0.0%
May	346,312	399	0.1%	294	1	295	73.9%	0.1%
June	348,174	299	0.1%	84	1	85	28.4%	0.0%
July	350,017	14	0.0%	1	0	1	7.1%	0.0%
August								
September								
October								
November								
December								
YTD Total	350,017	3,657	1.0%	2,772	29	2,801	76.6%	0.8%

1 SDG&E continues to analyze its data for changes to customer totals due to a processing backlog and potential data discrepancies currently under review.

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

CARE Table 4 - Enrollment by County
San Diego Gas & Electric
July 2022

County	Estimated Eligible Households ¹			Total Households Enrolled ²			Enrollment Rate ³		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Orange	16,607	-	16,607	15,067	-	15,067	91%	0%	91%
San Diego	266,215	6,494	272,709	327,311	7,639	334,950	123%	118%	123%
Total	282,822	6,494	289,316	342,378	7,639	350,017	121%	118%	121%

¹ As reflected in filing A.19-11-005, et al., Annual CARE Eligibility Estimates filed February 14, 2022. However, SDG&E noticed a rounding difference when calculating the Estimated Eligible Households by Urban and Rural breakdown, this resulted in a difference of (3) less Eligible Households.

² Total Households Enrolled includes submeter tenants.

³ Penetration Rate and Enrollment Rate are the same value.

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

**CARE Table 5 - Recertification Results
San Diego Gas & Electric
July 2022**

Month	Total CARE Households	Households Requested to Recertify	% of Households Total (C/B)	Households Recertified ¹	Households De-enrolled ²	Recertification Rate % (E/C)	% of Total Households De-enrolled (F/B)
January	324,863	5,513	1.7%	3,008	231	4.2%	0.1%
February	326,865	2,668	0.8%	1,522	174	6.5%	0.1%
March	327,526	124	0.0%	7	81	65.3%	0.0%
April	345,731	153	0.0%	10	83	54.2%	0.0%
May	346,312	58	0.0%	7	18	31.0%	0.0%
June	348,174	163	0.0%	6	35	21.5%	0.0%
July	350,017	295	0.1%	20	22	7.5%	0.0%
August							
September							
October							
November							
December							
YTD	350,017	8,974	2.6%	4,580	644	51.0%	0.2%

¹ SDG&E continues to analyze its data for changes to customer totals due to a processing backlog and potential data discrepancies currently under review.

²Includes customers who did not respond or who requested to be de-enrolled.

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

CARE Table 6 - Capitation Contractors¹
SDG&E
July 2022

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
211 SAN DIEGO		X			78	970
ALPHA MINI MART	X				22	52
AMERICAN RED CROSS WIC OFFICES		X	X		-	2
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	1
COMMUNITY RESOURCE CENTER		X			-	1
ELDERHELP OF SAN DIEGO		X			-	-
HEARTS AND HANDS WORKING TOGETHER		X			-	-
HOME START		X			-	1
HORN OF AFRICA		X			-	-
INTERFAITH COMMUNITY SERVICES		X			-	-
LA MAESTRA FAMILY CLINIC		X			2	18
MAAC PROJECT		X		X	-	1
NEIGHBORHOOD HEALTH CARE		X			-	5
NORTH COUNTY HEALTH PROJECT, INC.	X				-	1
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	-
SAN YSIDRO HEALTH CENTERS		X			-	3
SCRIPPS HEALTH WIC		X			-	1
SOMALI BANTU ASSOCIATION OF AMERICA		X			-	-
SOMALI FAMILY SERVICES		X			-	-
VISTA COMMUNITY CLINIC		X			1	5
Total Enrollments					103	1,061

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

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

CARE Program Table 7 - Expenditures for Pilots and Studies
San Diego Gas & Electric
July 2022

2021	Authorized 2021-2026 Budget			Current Month Expenses			Year to Date Expenses			Cycle to Date Expenses		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots												
CARE Outbound Calling Pilot			\$ 80,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -
Studies												
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study			\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study			\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study			\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -
Joint IOU - Statewide CARE-ESA Categorical Study			\$ 11,250	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -
Total	\$ -	\$ -	\$ 203,750	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -

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

CARE Table 8
CARE and Disadvantage Communities Enrollment Rate for Zip Codes
San Diego Gas & Electric
July 2022

Total CARE Households Enrolled				
Month	CARE Enrollment Rate for Zip Codes that have 10% or more disconnections	CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG)	CARE Enrollment Rate for Zip Codes in High Poverty (with 70% or Less CARE Penetration)	CARE Enrollment Rate for DAC (Zip/Census Tract) Codes in High Poverty (with 70% or Less CARE Enrollment Rate)
January				
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				
YTD				

Note:

Data is not available at this time.

Penetration Rate and Enrollment Rate are the same value.

DACs are defined at the census tract level. Corresponding zip codes are provided for the purpose of this table; however, the entire zip code listed may not be considered a DAC.

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

CARE Table 8A

CARE Top 10 Lowest Enrollment Rates in High Disconnection, High Poverty, and DAC Communities by Zip Code San Diego Gas & Electric July 2022

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes that have 10% or more Disconnections
ZIP00001	
ZIP00002	
ZIP00003	
ZIP00004	
ZIP00005	
ZIP00006	
ZIP00007	
ZIP00008	
ZIP00009	
ZIP00010	

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG)
ZIP00001	
ZIP00002	
ZIP00003	
ZIP00004	
ZIP00005	
ZIP00006	
ZIP00007	
ZIP00008	
ZIP00009	
ZIP00010	

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in DAC
ZIP00001	
ZIP00002	
ZIP00003	
ZIP00004	
ZIP00005	
ZIP00006	
ZIP00007	
ZIP00008	
ZIP00009	
ZIP00010	

Note:

Data is not available at this time.

Some zip codes rolled up to the nearest zip code for privacy reasons due to the number of people residing in that zip code.

Data not available at this time.

DACs are defined at the census tract level. Corresponding zip codes are provided for the purpose of this table; however, the entire zip code listed may not be considered a DAC.

FERA Table 1 - FERA Program Expenses
San Diego Gas & Electric
July 2022

	Authorized Budget [1]	Current Month Expenses	Year to Date Expenses	% of Budget Spent YTD
FERA Program:	Electric	Electric	Electric	Electric
Outreach	\$ 361,080	\$ 2,694	\$ 73,994	20%
Processing / Certification Re-certification	\$ 12,874	\$ 5,145	\$ 18,833	146%
Post Enrollment Verification	\$ 923	\$ 576	\$ 359	39%
IT Programming	\$ 151,500	\$ 490	\$ 6,764	4%
Pilot(s)	\$ -	\$ -	\$ -	0%
Studies	\$ 50,000	\$ -	\$ -	0%
Regulatory Compliance	\$ 44,660	\$ 4,822	\$ 29,347	66%
General Administration	\$ 71,930	\$ (470)	\$ 18,437	26%
CPUC Energy Division	\$ 10,183	\$ -	\$ 2,468	24%
SUBTOTAL MANAGEMENT COSTS	\$ 703,150	\$ 13,257	\$ 150,202	21%
FERA Rate Discount [2]	\$ 3,711,343	\$ 419,228	\$ 2,408,800	65%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 4,414,493	\$ 432,485	\$ 2,559,002	58%
Indirect Costs		\$ 3,820	\$ 37,155	

1. Budget approved in D.21-06-015, Attachment 1, Table 4.
2. FERA Discount amount reflected in Advice Letter 3849-E, effective January 1st, 2022.

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

FERA Table 2 - Enrollment, Recertification, Attrition, & Penetration
San Diego Gas & Electric
July 2022

	New Enrollment										Recertification ⁶				Attrition (Drop Offs) ^{6, 7}					Enrollment		Total FERA Participants	Estimated FERA Eligible	Enrollment Rate % ⁵ (W/X)
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)			
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)															
January	-	-	-	-	172	38	14	5	229	229	6	43	-	49	208	-	53	(235)	26	278	203	11,686	43,709	27%
February	-	-	-	-	245	15	28	5	293	293	4	48	-	52	174	-	36	237	447	345	(154)	11,532	43,709	26%
March	-	-	-	-	251	9	26	-	286	286	2	50	-	52	64	-	16	193	273	338	13	11,545	43,709	26%
April	-	-	-	-	158	19	7	3	187	187	-	35	-	35	4	-	14	(736)	(718)	222	905	12,450	43,709	28%
May	-	-	-	-	148	19	7	-	174	174	1	49	-	50	2	-	6	257	265	224	(91)	12,359	43,709	28%
June	-	-	-	-	84	10	6	1	101	101	-	27	-	27	2	-	-	241	243	128	(142)	12,217	43,709	28%
July	-	-	-	-	114	7	5	1	127	127	4	26	-	30	2	-	3	231	236	157	(109)	12,108	43,709	28%
August					-	-	-	-			-	-	-		-	-	-	-						
September					-	-	-	-			-	-	-		-	-	-	-						
October					-	-	-	-			-	-	-		-	-	-	-						
November					-	-	-	-			-	-	-		-	-	-	-						
December					-	-	-	-			-	-	-		-	-	-	-						
YTD Total	-	-	-	-	1,172	117	93	15	1,397	1,397	17	278	-	295	456	-	128	188	772	1,692	625	12,108	43,709	28%

¹ Enrollments via data sharing between the IOUs.

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

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

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

⁵ Penetration Rate and Enrollment Rate are the same value.

⁶ SDG&E continues to analyze its data for changes to customer totals due to a processing backlog and potential data discrepancies currently under review.

⁷ In April 2022, SDG&E reinstated approximately 20,000 customers onto the CARE and FERA programs who had been impacted by the issues articulated SDG&E's March 17, 2022 "Request for an Extension of Deadlines to Comply with California Alternative Rates for Energy, Family Electric Rate Assistance, and Medical Baseline Recertification Requirements" to Rachel Peterson, CPUC Executive Director, which was subsequently approved on May 13, 2022.

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

FERA Table 3A - Post-Enrollment Verification Results (Model)
San Diego Gas & Electric
July 2022

Month	Total FERA Households Enrolled	Households Requested to Verify	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible)	Total Households De-enrolled	% De-enrolled through Post Enrollment Verification	% of Total FERA Households De-enrolled
January	11,686	-	0.0%	0	-	-	0.0%	0.0%
February	11,532	1	0.0%	0	-	-	0.0%	0.0%
March	11,545	-	0.0%	0	-	-	0.0%	0.0%
April	12,450	-	0.0%	0	-	-	0.0%	0.0%
May	12,359	-	0.0%	0	-	-	0.0%	0.0%
June	12,217	44	0.4%	0	-	-	0.0%	0.0%
July	12,108	59	0.5%	0	1	1	0.0%	0.0%
August								
September								
October								
November								
December								
YTD Total	12,108	104	0.9%	-	1	1	1.0%	0.0%

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

FERA Table 3B Post-Enrollment Verification Results (Electric only High Usage) ¹
San Diego Gas & Electric
July 2022

Month	Total FERA Households Enrolled	Households Requested to Verify	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible)	Total Households De-enrolled	% De-enrolled through Post Enrollment Verification	% of Total FERA Households De-enrolled
January	11,686	-	0.0%	-	-	-	0.0%	0.0%
February	11,532	-	0.0%	-	-	-	0.0%	0.0%
March	11,545	-	0.0%	-	-	-	0.0%	0.0%
April	12,450	-	0.0%	-	-	-	0.0%	0.0%
May	12,359	-	0.0%	-	-	-	0.0%	0.0%
June	12,217	-	0.0%	-	-	-	0.0%	0.0%
July	12,108	-	0.0%	-	-	-	0.0%	0.0%
August								
September								
October								
November								
December								
YTD Total	12,108	-	0.0%	-	-	-	0.0%	0.0%

¹ SDG&E continues to analyze its data for changes to customer totals due to a processing backlog and potential data discrepancies currently under review.

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

FERA Table 4 - Enrollment by County
San Diego Gas & Electric
July 2022

County	Estimated Eligible Households			Total Households Enrolled ¹			Enrollment Rate ²		
	Urban	Rural	Total	Urban	Rural ³	Total	Urban	Rural	Total
Orange	2,102	-	2,102	449	-	449	21%	0%	21%
San Diego	40,415	1,192	41,607	11,373	286	11,659	28%	24%	28%
Total	42,517	1,192	43,709	11,822	286	12,108	28%	24%	28%

¹ Total Households Enrolled includes submeter tenants.

² Penetration Rate and Enrollment Rate are the same value.

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

FERA Table 5 - Recertification Results ¹

San Diego Gas & Electric

July 2022

Month	Total FERA Households	Households Requested to Recertify	% of Households Total (C/B)	Households Recertified	Households De-enrolled	Recertification Rate % (E/C)	% of Total Households De-enrolled (F/B)
January	11,686	135	1.2%	0	49	0%	0.4%
February	11,532	78	0.7%	4	14	5%	0.1%
March	11,545	26	0.2%	-	2	0%	0.0%
April	12,450	51	0.4%	-	2	0%	0.0%
May	12,359	8	0.1%	-	-	0%	0.0%
June	12,217	4	0.0%	-	1	0%	0.0%
July	12,108	6	0.0%	-	-	0%	0.0%
August							
September							
October							
November							
December							
YTD	12,108	308	2.5%	4	68	1.3%	0.6%

¹ SDG&E continues to analyze its data for changes to customer totals due to a processing backlog and potential data discrepancies currently under review.

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

FERA Table 6 - Capitation Contractors¹
San Diego Gas & Electric
July 2022

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
211 SAN DIEGO		X			1	15
ALPHA MINI MART	X				-	-
AMERICAN RED CROSS WIC OFFICES		X	X		-	-
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	-
COMMUNITY RESOURCE CENTER		X			-	-
ELDERHELP OF SAN DIEGO		X			-	-
HEARTS AND HANDS WORKING TOGETHER		X			-	-
HOME START		X			-	-
HORN OF AFRICA		X			-	-
INTERFAITH COMMUNITY SERVICES		X			-	-
LA MAESTRA FAMILY CLINIC		X			-	-
MAAC PROJECT		X		X	-	-
NEIGHBORHOOD HEALTH CARE		X			-	-
NORTH COUNTY HEALTH PROJECT, INC.	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						
VISTA COMMUNITY CLINIC		X			-	-
Total Enrollments					1	15

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

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