

**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

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

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October 21, 2022

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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 ninth monthly report for program year (PY) 2022, and presents year-to-date CARE, FERA, and ESA Program results and expenditures through September 30, 2022, for San Diego Gas & Electric Company (SDG&E).

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.<sup>1</sup> 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.<sup>2</sup> 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.<sup>3</sup>

### 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).<sup>4</sup> 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

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

<sup>2</sup> *Id.*

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

<sup>4</sup> 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:

<b>ESA Main Program Summary for 2022</b>			
	<b>Authorized / Forecasted Planning Assumptions<sup>5</sup></b>	<b>Actual to Date</b>	<b>%</b>
Budget <sup>6</sup>	\$ 24,305,647	\$10,541,329	43%
Homes Treated <sup>7</sup>	13,760	8,488	62
kWh Saved	2,955,161	858,902	29
kW Demand Reduced	428	112	26
Therms Saved	127,171	12,549	10
GHG Emissions Reduced (Tons)	N/A	546	

### **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:

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<sup>5</sup> 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.

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

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

<b>ESA MF CAM Program Summary for 2022</b>			
	<b>Authorized / Forecasted Planning Assumptions<sup>8</sup></b>	<b>Actual to Date</b>	<b>%</b>
Budget	\$ 1,600,000	\$845,080	53%
Properties Treated	40	17	43
kWh Saved	N/A	111,114	
kW Demand Reduced	N/A	22	
Therms Saved	N/A	1,645	

### **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.

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<sup>8</sup> 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 May 24, 2022, SDG&E discussed the results of the solicitation with the Energy Division and informed them of SDG&E's decision not to award the contract at this time. Because no proposals were selected, SDG&E also discussed several solicitation alternatives to ensure that a third-party implementer is selected for the Pilot.

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.<sup>9</sup> 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

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<sup>9</sup> 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.

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 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 and Pilot Implementation Plan using a Pilot approach similar to SCE and SCG's Joint-IOU approved design, SDG&E will reissue a Pilot solicitation in Q4 2022. On August 2, 2022, SDG&E updated the joint IOU solicitation 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 and posted the Plan online. On August 31, IOU Pilot Team Leaders presented the customer facing name of ESA Whole Home to the Energy Division. It was considered acceptable for use.

On September 16, 2022, SDG&E sent a notice of SDG&E's ESA Pilot Plus and Pilot Deep 2.0 Program Workshop to the following service lists: A.14-11-007 et al., A.19-11-003 et al., R.13-11-005, R.15-03-010, R.18-07-006, GO-96B, and R.18-07-005. On September 27, 2022, SDG&E hosted a public workshop to introduce the preliminary implementation plans for its Pilot Plus and Pilot Deep 2.0 program and sought stakeholder feedback in accordance with OP 40 of D.21-06-015.

ESA Pilot Plus and Pilot Deep Summary for 2022			
	Authorized / Planning Assumptions	Actual to Date	%
Budget <sup>10</sup>	\$ 1,526,683	\$ 0	0
Homes Treated <sup>11</sup>	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

### **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.<sup>12</sup> 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.<sup>13</sup> In September 2022, SDG&E identified minor corrections in its measure list that have since been updated to reflect the measure mix as filed in its Application, filed on November 14, 2019, and subsequently approved in D.21-06-015. The following corrections were made:

**Smart Thermostats:** Clarified that this Basic Measure is available to all customers and not limited to High Energy Users (HEU).

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<sup>10</sup> D.21-06-015 at Attachment 2, Table 1.

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

<sup>12</sup> D.21-06-015 at 486, OP 69.

<sup>13</sup> 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.

**Efficient Fan Controller:** Removed the reference of availability to only electric heated homes.

**Water Heater Repair and Replacement:** – Clarified that this measure is available to homes with gas water heating and mobile homes.

**Heat Pump Water Heater:** Clarified that this measure is available to homes with electric water heating.

## **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, 445 ESA enrollments were received through canvassing efforts, which is a 6% increase when compared to the prior month's activity. Overall, ESA Program Marketing, Education, and Outreach (ME&O) efforts were successful in creating 7,062 leads and 899 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. Seven properties were treated this month for a total of seventeen properties in 2022. In addition, five properties are currently receiving measure installations and five 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, five customers were served by the Language Line this month.

<b>Language</b>	<b>Calls</b>
Mandarin	1
Arabic	3
Cantonese	1
<b>Total</b>	<b>5</b>

### **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 continued an ESA-specific digital campaign, including paid social, search and display. Since the last reporting month, SDG&E began running ESA YouTube ads.

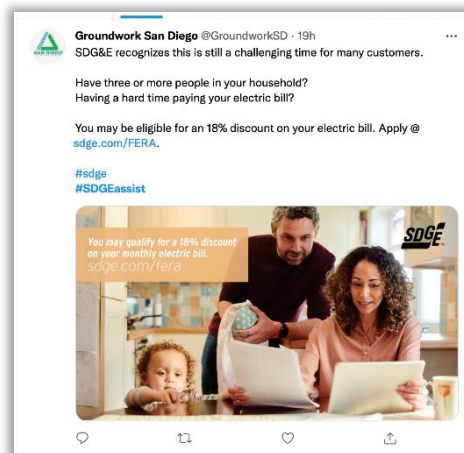
## ESA Digital Advertising – September

	Impressions	Click Through Rate (CTR)	Conversions*
Paid Social	71,423	3.53%	N/A
Search	160,843	1.33%	117
Display	734,909	0.18%	128
Nextdoor	113,622	0.23%	N/A
YouTube	88,037	0.06%	N/A

\*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 140 customer assistance messages to an audience of more than 522,000 followers. SDG&E's social media profiles also post messaging to a collective audience of more than 1.2 million followers across multiple social media channels including Twitter, LinkedIn, Facebook, and Nextdoor. 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 90,646 customers with a 50%Open Rate and 5CTR.

### **Direct Mail**

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

### **Call Campaign**

SDG&E's third-party contractor, The Harris Group (THG), called targeted customers to enroll in the CARE Program.<sup>14</sup> 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 if eligible will enroll customers over the phone except for ESA. THG also targets customers who are up for recertification for CARE and FERA. Outbound call activities generated the following numbers this month:

<b>The Harris Group</b>	
ESA Leads	3,116
CARE Enrollments	2,023
CARE Recertifications	79
FERA Enrollments	114
FERA Recertifications	0

## **Community Outreach & Engagement**

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

### Energy Solutions Partner Network

SDG&E works closely with a network of approximately 200 community-based organizations (CBOs) to connect customers with programs and solutions related to Customer Assistance, Energy Efficiency and Conservation, SDG&E's COVID-19 response, Public Safety Power Shutoff resiliency, and wildfire preparedness. These organizations represent the diversity of SDG&E's customers within its service territory. The majority of these CBOs are small, grassroots agencies serving customers with access and functional needs, including those that are multicultural, multilingual, low income, seniors, and LEP audiences in communities of concern. These partners help educate and enroll customers in low income programs utilizing a variety of tactics, including messaging through email 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:

<b>Energy Solutions Partner Network</b>	
ESA Leads	0
CARE Enrollments	11
CARE Recertifications	0
FERA Enrollments	0
FERA Recertifications	0

### Partner Spotlight

SDG&E's Customer Outreach and Engagement team participated in over 25 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 3,700 people. A few of the outreach events SDG&E participated in are highlighted below.

#### *Nativity Prep Academy*

On September 7, 2022, SDG&E attended the Nativity Prep Academy Open House event. The academy is a private-independent, all-scholarship Catholic middle school and college-preparatory program for young men and women from low-income families who represent the first generation to graduate from college. At this Open House event, families were able visit the school and learn about different community offerings. SDG&E attended the event and provided information regarding Customer Assistance programs including CARE, ESA, and FERA to attendees.

#### *Somali Family Services*

On September 28, 2022, SDG&E attended the Somali Family Services Community Resource Fair. Somali Family Services focuses on engaging the Somali community through three avenues: civic engagement, health, and the creative arts. During the fair, members of the community were able to learn more about programs and services available to them in San Diego. The SDG&E Outreach team provided information on Customer Assistance programs including CARE, ESA, and FERA to attendees.

#### 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:

<b>Date</b>	<b>Event Name</b>	<b>Partner/Host</b>	<b>Location</b>
9/15/2022	Resource Fair	Sherman Heights Community Center	2258 Island Avenue, San Diego, CA 92102
9/24/2022	Fire and Water Expo	Escondido Fire Dept (#4) and Rincon del Diablo Fire District	3301 Bear Valley Parkway Escondido, CA 92025
9/30/2022	La Maestra Fiesta Hispana Fair	La Maestra Community Health Centers	4060 Fairmount Ave. San Diego CA., 92105

### **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:

	<b>CCC</b>	<b>Branch Office</b>
ESA Leads	18	0
CARE Enrollments	1	61
CARE Recertifications	2	5
FERA Enrollments	0	0
FERA Recertifications	0	0

### **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](http://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.<sup>15</sup> 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. Through September 2022, SDG&E has received 48 ESA Program leads and two enrollments resulting from this activity.

### San Diego County Water Authority (SDCWA) Leveraging Effort

As part of SDG&E's leveraging agreement with 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

### California Emerging Technology Fund (CETF)

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.

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

### 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 September 2022.

#### **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 149 leads and enrolled 44 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 disadvantaged 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 September 2022, the study team continued to provide revisions to the draft report. The report and study findings are scheduled to be presented in a public workshop on October 25<sup>th</sup>.

#### Categorical Eligibility Study

The Categorical Eligibility Study is evaluating a set of relevant means-tested public assistance programs with the aim of assessing their applicability for CARE, ESA, and FERA categorical enrollment. The study commenced in June 2022 with Evergreen Economics as the evaluating consultant. During the month of September, Evergreen collected publicly available data on the customer assistance programs under review. The study team met weekly to discuss the process and to develop questions for telephone interviews with representatives of the assistance programs which will take place in October.

#### ESA CAM Process Evaluation

Pacific Gas and Electric Company (PG&E) led a statewide process evaluation of the ESA CAM initiative with Resource Innovations Inc. (formerly Nexant) as the evaluator. The study wrapped up in September with a public workshop held on September 7, 2022 to present the study results. Following the workshop, the study report was finalized, and the study is now complete.

### **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.<sup>16</sup> The CARE Program currently provides a 20% discount on natural gas charges and a 30-35% discount on electric rates.<sup>17</sup> 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 Information system (CIS). As a result of the Backlog and other related CIS issues,

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

<sup>17</sup> 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."

approximately 20,000 CARE and FERA customers fell off their respective low income program.<sup>18</sup>

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 all 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.

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<sup>18</sup> 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.

**2.1.1 Please provide CARE Program summary costs.**

<b>CARE Program Summary for 2022</b>			
<b>CARE Budget Categories</b>	<b>Authorized Budget<sup>19</sup></b>	<b>Actual Expenses to Date</b>	<b>% of Budget Spent</b>
Outreach	\$ 3,237,393	\$ 1,833,265	57%
Proc., Certification and Verification	\$ 587,593	\$ 1,007,569	171%
Post Enrollment Verification	\$ 456,452	\$ 58,164	13%
Information Tech./Programming	\$ 1,080,000	\$ 311,893	29%
Pilots	\$ 0	\$ 0	0%
CHANGES	\$ 265,000	\$ 202,233	76%
Studies	\$ 107,719	\$ 31,047	29%
Regulatory Compliance	\$ 309,000	\$ 131,838	43%
General Administration	\$ 630,000	\$ 345,996	55%
CPUC Energy Division Staff	\$ 67,888	\$21,136	31%
<b>Total Expenses</b>	<b>\$ 6,741,045</b>	<b>\$ 3,943,141</b>	<b>58%</b>
Subsidies and Benefits <sup>20</sup>	\$ 165,211,754	\$ 170,548,224	103%
<b>Total Program Costs and Discounts</b>	<b>\$ 171,952,799</b>	<b>\$ 174,491,365</b>	<b>101%</b>

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

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

### 2.1.2 Provide the CARE Program enrollment rate to date.

CARE Enrollment		
Participants Enrolled <sup>21</sup>	Eligible Participants <sup>22</sup>	Enrollment Rate
353,949	289,316	122%

## 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 3,764 completed CARE applications and 2,667 new enrollments/recertifications for the program. Below is a summary of CARE-specific outreach efforts.

#### **Direct Marketing**

##### Direct Mail

In September 2022, SDG&E resumed the monthly CARE bill comparison letters, sending 1,091 direct mail letters to CARE-eligible customers without an email address on file.

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<sup>21</sup> 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.

<sup>22</sup> 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.

### Email

During this reporting month, SDG&E also resumed the Bill Comparison emails, sending 46,574 emails to low income customers garnering a 50.8 open rate and 4% CTR.

### Organic Social

SDG&E utilized organic social media to promote CARE on SDG&E's Facebook, Instagram, Twitter and Nextdoor channels. All posts performed above the average Engagement Rate across all industries.<sup>23</sup>

	Impressions	Engagements	Engagement Rate
Facebook	571	7	1.23%
Instagram	647	22	3.4%
Twitter	30,988	60	4.09%
Nextdoor	30,988	10	N/A

### Online Advertising

In September, 2022, SDG&E continued the CARE-specific digital campaign to include paid social, search display and YouTube advertising.

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<sup>23</sup> According to the 2019 Social Media Industry Benchmark Report by Rival IQ, a social media analytics company.

CARE Digital Advertising – September			
	Impressions	CTR	Conversions*
Paid Social	231,972	0.32%	N/A
Search	72,500	28.98%	775
Display	1,892,027	0.11%	1,373
YouTube	304,580	0.05%	N/A

\*Conversions are customers who clicked from an ad through to the last page of the online 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) 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:

<b>Capitation Agencies</b>	
ESA Leads	154
CARE Enrollments	145
CARE Recertifications	11
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:

<b>HHSA</b>	<b>Number of:</b>	<b>YTD<sup>24</sup></b>
ESA Leads	0	0
CARE Enrollments	63	459
CARE Recertifications	2	47
FERA Enrollments	0	2
FERA Recertifications	0	0

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<sup>24</sup> Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.



## **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 Opinion Dynamics as the consulting firm conducting the study. During September, the Consultant finalized interviews with the Community Based Organizations (CBOs) that provide services for the program. In addition, the Consultant developed a Program Theory and Logic Model (PTLM) for the program. A draft survey for program participants was also developed and discussed with the study team.

### **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 58 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.<sup>25</sup> 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.

<b>FERA Budget Categories</b>	<b>Authorized Budget<sup>26</sup></b>	<b>Actual Expenses to Date</b>	<b>% of Budget Spent</b>
Outreach	\$ 361,080	\$ 135,741	38%
Proc., Certification and Verification	\$ 12,874	\$ 14,147	110%
Post Enrollment Verification	\$ 923	\$ 579	63%
Information Tech./Programming	\$ 151,500	\$ 11,746	8%
Pilot(s)	\$ 0	\$ 0	0%
Studies	\$ 50,000	\$ 0	0%
Regulatory Compliance	\$ 44,660	\$ 39,741	89%
General Administration	\$ 71,930	\$ 21,369	30%
CPUC Energy Division Staff	\$ 10,183	\$ 4,227	42%
<b>Total Expenses</b>	<b>\$ 703,150</b>	<b>\$ 227,550</b>	<b>32%</b>
Subsidies and Benefits <sup>27</sup>	\$3,711,343	\$ 3,546,259	96%
<b>Total Program Costs and Discounts</b>	<b>\$ 4,414,493</b>	<b>\$ 3,773,809</b>	<b>85%</b>

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

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

<sup>27</sup> 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
12,146	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 87 completed FERA applications and 73 new enrollments/recertifications for the program. Below is a summary of FERA specific outreach efforts.

#### **Direct Marketing**

##### Direct Mail

This month, due to the low number of customers without email addresses, it was not cost-effective for SDG&E to 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 Q4 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 4,815 FERA bill comparison emails which garnered a 57.6% open rate and a 5.2% click-through rate.

### Online Advertising

Since the last reporting period, SDG&E continued a FERA-specific digital campaign, including paid social, search and display. Additionally, a third-party e-blast was sent to 30,000 customers.

FERA Digital Advertising – September			
	Impressions	CTR	Conversions*
Paid Social	195,886	0.35%	N/A
Search	2,499	15.37%	58
Display	450,816	0.24%	160
Nextdoor	80,838	0.18%	
E-Blast	30,000	2.48%	N/A
YouTube	61,791	0.03%	N/A

\*Conversions are customers who clicked from an ad through to the last page of the online 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**  
**September 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) <sup>1</sup>			\$ 24,305,647	\$ 743,689	\$ 771,030	\$ 1,514,719	\$ 5,317,527	\$ 5,223,802	\$ 10,541,329			43%
ESA Multifamily In-Unit <sup>2</sup>			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
ESA Multifamily Common Area Measures			\$ 1,600,000	\$ 130,533	\$ 46,453	\$ 176,986	\$ 558,185	\$ 286,895	\$ 845,080			53%
ESA Multifamily Whole Building <sup>3</sup>			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
ESA Pilot Plus and Pilot Deep			\$ 1,526,683	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Building Electrification Retrofit Pilot <sup>4</sup>			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Clean Energy Homes New Construction Pilot <sup>4</sup>			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
CSD Leveraging			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
<b>ESA Program TOTAL</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 27,432,330</b>	<b>\$ 874,222</b>	<b>\$ 817,483</b>	<b>\$ 1,691,705</b>	<b>\$ 5,875,712</b>	<b>\$ 5,510,697</b>	<b>\$ 11,386,409</b>			<b>42%</b>

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  
September 2022**

Appliances	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
<b>Energy Efficiency</b>			\$16,815,503									
Appliances			\$ -	\$ 14,216	\$ 13,593	\$ 27,809	\$ 528,073	\$ 74,138	\$ 602,211			
Domestic Hot Water			\$ -	\$ 2,403	\$ 77,701	\$ 80,104	\$ 21,707	\$ 701,845	\$ 723,552			
Enclosure			\$ -	\$ 104,566	\$ 138,611	\$ 243,177	\$ 691,383	\$ 916,484	\$ 1,607,867			
HVAC [2]			\$ -	\$ (128,811)	\$ 126,461	\$ (2,351)	\$ 243,077	\$ 922,348	\$ 1,165,425			
Maintenance			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Lighting			\$ -	\$ 294,638	\$ -	\$ 294,638	\$ 1,014,776	\$ -	\$ 1,014,776			
Miscellaneous			\$ -	\$ 42,013	\$ -	\$ 42,013	\$ 209,524	\$ -	\$ 209,524			
Customer Enrollment			\$ -	\$ 121,460	\$ 121,460	\$ 242,920	\$ 949,105	\$ 949,104	\$ 1,898,209			
In Home Education			\$ -	\$ 19,195	\$ 19,195	\$ 38,389	\$ 153,783	\$ 153,783	\$ 307,566			
ESA Pilot Plus and Pilot Deep			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
<b>Energy Efficiency TOTAL</b>	\$ -	\$ -	\$ 16,815,503	\$ 469,679	\$ 497,020	\$ 966,700	\$ 3,811,426	\$ 3,717,703	\$ 7,529,129			45%
Training Center			\$ 337,201	\$ 1,214	\$ 1,214	\$ 2,429	\$ 7,854	\$ 7,854	\$ 15,708			5%
Workforce Education and Training			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Inspections			\$ 162,981	\$ 7,522	\$ 7,522	\$ 15,045	\$ 53,887	\$ 53,887	\$ 107,774			66%
Marketing and Outreach			\$ 1,069,140	\$ 81,050	\$ 81,050	\$ 162,101	\$ 341,274	\$ 341,274	\$ 682,549			64%
Studies			\$ 162,500	\$ 9,223	\$ 9,223	\$ 18,446	\$ 53,443	\$ 53,443	\$ 106,887			66%
Regulatory Compliance			\$ 294,680	\$ 11,839	\$ 11,839	\$ 23,678	\$ 95,150	\$ 95,150	\$ 190,300			65%
General Administration			\$ 5,104,453	\$ 162,380	\$ 162,380	\$ 324,761	\$ 933,488	\$ 933,488	\$ 1,866,976			37%
CPUC Energy Division			\$ 53,113	\$ -	\$ -	\$ -	\$ 8,454	\$ 8,454	\$ 16,909			32%
SPOC			\$ 306,076	\$ 780	\$ 780	\$ 1,560	\$ 12,549	\$ 12,548	\$ 25,097			8%
<b>Administration Subtotal</b>	\$ -	\$ -	\$ 7,490,144	\$ 274,010	\$ 274,010	\$ 548,019	\$ 1,506,101	\$ 1,506,099	\$ 3,012,200			40%
<b>TOTAL PROGRAM COSTS</b>	\$ -	\$ -	\$ 24,305,647	\$ 743,689	\$ 771,030	\$ 1,514,719	\$ 5,317,527	\$ 5,223,802	\$ 10,541,329			43%
Indirect Costs				\$ 72,059	\$ 71,735	\$ 143,794	\$ 477,919	\$ 475,816	\$ 953,735			
NGAT Costs		\$200,000	\$ 200,000		\$ 18,564	\$ 18,564		\$ 71,292	\$ 71,292		36%	36%

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

2. Negative amount in HVAC 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**  
**September 2022**

	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
<b>ESA Program (Multifamily):</b>												
ESA Multifamily In-Unit <sup>1</sup>			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
ESA Multifamily Common Area Measures 2			\$ 1,600,000	\$ 130,533	\$ 46,453	\$ 176,986	\$ 558,185	\$ 286,895	\$ 845,080			53%
ESA Multifamily Whole Building <sup>3</sup>			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
<b>ESA Program (Multifamily) TOTAL</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,600,000</b>	<b>\$ 130,533</b>	<b>\$ 46,453</b>	<b>\$ 176,986</b>	<b>\$ 558,185</b>	<b>\$ 286,895</b>	<b>\$ 845,080</b>			53%

<sup>1</sup> Budget is included in ESA Main Program.

<sup>2</sup> 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.

<sup>3</sup> 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%
<b>TOTAL</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,526,683</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>			0%

**ESA Table 1A-2 - Building Electrification Expenses<sup>3</sup>**

	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			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
<b>TOTAL</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>

<sup>3</sup> Pilots is applicable to SCE only.

**ESA Table 1A-3 - Clean Energy Homes Expenses<sup>3</sup>**

	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			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
<b>TOTAL</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>

<sup>3</sup> 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			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
<b>TOTAL</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>

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 2 (SF, MH, MF In-Unit)							
San Diego Gas & Electric							
September 2022							
Measures/ Appliances	Units	Quantity Installed	ESA Program (Summary) Total				% of Expenditure
			Year-To-Date Completed & Expensed Installation			Expenditures (\$)	
			kWh (4) (Annual)	kWh (4) (Annual)	Therms (4) (Annual)		
High Efficiency Clothes Washer	Each	110	2,077	0	1,856	84,087	1.2%
Refrigerator	Each	424	264,896	32	-	493,576	6.9%
New - Clothes Dryer	Each	-	-	-	-	-	0.0%
New - Dishwasher	Each	-	-	-	-	-	0.0%
Freezers	Each	-	-	-	-	-	0.0%
<b>Domestic Hot Water</b>							
Electric Anode	Each	-	-	-	-	-	0.0%
Water Heater Hot Water(3)	Home	2,695	18,477	3	7,671	226,562	3.0%
Water Heater Tank and Pipe Insulation	Home	413	-	-	180	39,437	0.5%
Water Heater Repair/Replacement	Home	648	-	-	16,864	489,247	6.4%
Low Flow Showerhead / Combined Showerhead/TSV	Home	37	290	0	211	3,071	0.0%
Heat Pump Water Heater	Each	-	-	-	-	-	0.0%
Thermostatic Tap Spout/Cherter	Each	-	-	-	-	-	0.0%
Thermostatic Shower Valve	Each	-	-	-	-	-	0.0%
New - Solar Water Heating	Each	-	-	-	-	-	0.0%
<b>Enclosure(1)</b>							
Air Sealing	Home	2,979	45,760	10	1,222	1,507,807	19.7%
Caulking	Home	-	-	-	-	-	0.0%
New - Diagnostic Air Sealing	Home	-	-	-	-	-	0.0%
Attic Insulation	Home	66	3,010	1	1,981	84,092	1.2%
New - Floor Insulation	Home	-	-	-	-	-	0.0%
<b>HVAC</b>							
Removed - FAU Standing Pilot Conversion	Each	-	-	-	-	-	0.0%
Furnace Repair/Replacement	Each	897	-	-	154,731	839,882	11.0%
Room A/C Replacement	Each	129	(5,208)	10	-	138,029	1.8%
Central A/C replacement	Each	-	-	-	-	-	0.0%
Heat Pump Replacement	Each	-	-	-	-	-	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	-	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	-	0.0%
Duct Test and Seal	Home	94	-	-	394	22,818	0.3%
Energy Efficient Fan Control	Home	-	-	-	-	-	0.0%
New - Prescriptive Duct Sealing	Home	-	-	-	-	-	0.0%
High Efficiency Forced Air Unit (w/ FAU)	Home	-	-	-	-	-	0.0%
Recovery A/C Time Delay	Home	-	-	-	-	-	0.0%
Smart Thermostat	Home	110	11,371	-	696	50,508	0.7%
New - Portable A/C	Each	-	-	-	-	-	0.0%
New - Central Heat Pump-PS (propane or gas space)	Each	-	-	-	-	-	0.0%
New - Wholehouse Fan	Each	-	-	-	-	-	0.0%
<b>Maintenance</b>							
Furnace Clean and Tune	Home	-	-	-	-	-	0.0%
Central A/C Tune-up	Home	-	-	-	-	-	0.0%
New - Evaporative Cooler Maintenance	Home	-	-	-	-	-	0.0%
<b>Lighting</b>							
Removed - Interior Hard wired LED fixtures	Each	1,033	4,370	1	(80)	89,514	1.2%
Exterior Hard wired LED fixtures	Each	259	1,691	0	-	24,614	0.3%
Removed - LED, Incandescent	Each	-	-	0	-	48	0.0%
Removed - Occupancy Sensor	Each	-	-	-	-	-	0.0%
Removed - LED Night Light	Each	-	-	-	-	-	0.0%
LED Reflector Bulbs	Each	-	-	-	-	-	0.0%
LED K981 Lamps	Each	5,951	17,872	3	(280)	98,619	1.3%
LED A-Lamps	Each	80,138	197,050	23	(3,314)	1,352,885	17.4%
<b>Miscellaneous</b>							
Pilot Pumps	Each	-	-	-	-	2,150	0.0%
Power Strip	Each	636	89,040	12	-	52,730	0.4%
Power Strip (ver II)	Each	1,530	212,050	30	-	152,270	2.0%
NEW - Air Purifier	Home	-	-	-	-	-	0.0%
Cell Storage	Home	-	-	-	-	-	0.0%
New - Comprehensive Home Health and Safety Check-up	Home	-	-	-	-	-	0.0%
New - CO and Smoke Alarm	Each	-	-	-	-	-	0.0%
<b>Pilot</b>							
							0.0%
<b>Customer Enrollment</b>							
ESA Outreach & Assessment	Home	8,695	-	-	-	\$ 1,688,192	21.6%
ESA In-Home Energy Education	Home	8,694	-	-	-	\$ 265,124	3.3%
<b>Total Savings/Expenditures</b>							
			858,952	112	12,549	\$ 7,644,820	
<b>Total Households Weatherized (2)</b>							
		2,987					
<b>Households Treated</b>							
	Total						
- Single Family Households Treated	Home	3,177					
- Multi-Family Households Treated (In-unit)	Home	4,646					
- Mobile Homes Treated	Home	605					
<b>Total Number of Households Treated</b>							
	Home	8,428					
<b># Eligible Households to be Treated for PF (3)</b>							
	Home	13,190					
<b>% of Households Treated</b>							
	Home	63					
- Master-Meter Households Treated	Home	390					

(1) Envelope and Air Sealing Measures may include outlier cover plate gaskets, attic access weatherization, weatherstripping, door caulking and minor home air-tightening.

(2) Includes all types of attic insulation, attic access weatherization, weatherstripping, door caulking, & minor home repairs.

(3) Based on CP 79 of D-16-11-022

(4) All values are calculated based on the following sources: PY2015 to 2017 ESA Impact Evaluation and Statewide Measure Packages approved by the CA ETRM.

(5) Current Month Energy Efficiency Total does not include January credit and re-annual of \$436,767 in the following reporting categories: Solar PV \$60,137, Domestic Hot Water \$9,703, HVAC \$80,022, Misc. \$11,447, Lighting \$88,008, Expenditures \$5,261, Exclusions \$13,799, Customer Enrollment \$19,616 in Home Energy Education \$34,881.

Note: Any required conditional/compliance activities are reported herein and supersede results reported in prior months and may reflect TYP adjustments.

Note: Any measures noted as "NEW" have been added during the course of this program year.

Note: Any measures noted as "REMOVED" are no longer offered by the program but have been kept for tracking purposes and to allow for

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

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

(3) Based on QP '99 or QP 10-11-022.

(4) All savings are calculated based on the following sources: PY2015 to 2017 ESA Impact Evaluation and Statewide Measure Packages approved in the CA e-Plan.

(5) Current Month Expenses for Energy Efficiency Total does not include January accrual and re-accrual of \$436,767 in the following reporting categories: Appliances \$60,137; Domestic Hot Water \$9,703; HVAC \$20,020; Misc. \$11,467; Lighting \$88,080; Maintenance \$5,261; Enclosure \$13,799; Customer Enrollment \$183,616; In-Home Energy Education \$34,681.

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

Note: Any measures noted as "REMOVED" have been added during the course of this program year.

Note: Any measures noted as "REMOVED" are no longer offered by the program but have been kept for tracking purposes and to allow for



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

Table 2B ESA Program - Multifamily Common Area Measures <sup>5</sup>								
ESA CAM Measures <sup>(1)</sup>	Units (of Measure such as "each")	Year-To-Date Completed & Expensed Installation						% of Expenditure
		Quantity Installed	Number of Units for Cap-kBTU/h and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	
<b>Appliances</b>								
<b>Domestic Hot Water</b>								
Central Boiler**	Cap-kBTU/h	607	-	-	-	1,894	\$ 119,098	
Faucet Aerator	Each	-	-	-	-	-	\$ -	
Pipe Insulation	Home	-	-	-	-	-	\$ -	
<b>Envelope</b>								
<b>HVAC</b>								
AC Tune-up**	Cap-Tons	-	-	-	-	-	\$ -	
Furnace Replacement**	Cap-kBTU/h	-	-	-	-	-	\$ -	
HEAT Pump Split System**	Cap-Tons	-	-	-	-	-	\$ -	
HEAT Pump Split System	Each	-	-	-	-	-	\$ -	
Programmable Thermostat	Each	-	-	-	-	-	\$ -	
<b>Lighting</b>								
Exterior LED Lighting	Fixture	267		17,316	-	-	62,225	
Exterior LED Lighting - Pool	Lamp	406		76,079	18	(166)	\$ 68,835	
Interior LED Exit Sign	Fixture							
Interior LED Fixture	Fixture							
Interior LED Lighting	KiloLumen	174		4,046	1	-	\$ 30,727	
Interior LED Screw-in Lamp	Lamp	41		139	0	(0)	\$ 437	
Interior TLED Type A Lamps	Lamp	4		150	0	(1)	\$ 78	
Interior TLED Type C Lamps	Lamp	356		13,383	3	(80)	\$ 13,481	
<b>Miscellaneous</b>								
Tier-2 Smart Power Strip	Each	-	-	-	-	-	\$ -	
Variable Speed Pool Pump	Each	-	-	-	-	-	\$ -	
<b>Ancillary Services</b>								
Audit		28		-	-	-	\$ 48,969	
<b>Total</b>		1,883	-	111,114	22	1,645	\$ 343,850	
<b>Multifamily Properties Treated</b>	<b>Number</b>							
Total Number of Multifamily Properties Treated <sup>2</sup>	17							
Subtotal of Master-metered Multifamily Properties Treated	8							
Total Number of Multifamily Tenant Units with Properties Treated <sup>3</sup>	1080							
Total Number of Units with Properties Treated	114							

ESA Program - Multifamily Common Area	Year to Date Expenses			
	Electric	Gas	Total	
Administration	\$ 30,222	\$ 30,222	\$ 60,444	
Direct Implementation (Non-Incentive)	\$ 244,877	\$ 244,877	\$ 489,755	
Direct Implementation	\$ 285,086	\$ 11,795	\$ 296,881	<<Includes measures costs
<b>TOTAL MF CAM COSTS</b>	<b>\$ 558,185</b>	<b>\$ 286,895</b>	<b>\$ 845,080</b>	

[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 3198-E-A, 3054-C-A was approved effective 5/30/2018.  
\*\* Note: This represents the unit of measure such as Cap Tons and Cap kBTU/h. 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  
September 2022**

Common Area Measures Category and Eligible Measures Title [1]	Effective Date	End Date[2]	Eligible Climate Zones [3]
<b>Appliances</b>			
<b>Domestic Hot Water</b>			
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
<b>Envelope</b>			
<b>HVAC</b>			
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
<b>Lighting</b>			
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
<b>Miscellaneous</b>			
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](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**  
**September 2022**

Measures	Units	ESA Program - Pilot Plus							Measures	Units	ESA Program - Pilot Deep					
		Year-To-Date Completed & Expensed Installation									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%
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 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**  
**September 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
<b>Appliances</b>								<b>Appliances</b>							
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
<b>Domestic Hot Water</b>								<b>Domestic Hot Water</b>							
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
<b>Enclosure(1)</b>								<b>Enclosure(1)</b>							
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
<b>HVAC</b>								<b>HVAC</b>							
	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%
<b>Maintenance</b>								<b>Maintenance</b>							
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
<b>Lighting</b>								<b>Lighting</b>							
	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%
<b>Miscellaneous</b>								<b>Miscellaneous</b>							
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
<b>Customer Enrollment</b>								<b>Customer Enrollment</b>							
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%
<b>Total Savings/Expenditures</b>			-	-	-	\$ -	0.0%	<b>Total Savings/Expenditures</b>			-	-	-	\$ -	0.0%
<b>Households Treated</b>	<b>Total</b>							<b>Households Treated</b>	<b>Total</b>						
- Single Family Households Treated	Home							- Single Family Households Treated	Home						
- Mobile Homes Treated	Home							- Mobile Homes Treated	Home						
<b>Total Number of Households Treated</b>	Home							<b>Total Number of Households Treated</b>	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**  
**September 2022**

<b>Table 3A, ESA Program (SF, MH, MF In-Unit)</b>	
Annual kWh Savings	858,902
Annual Therm Savings	12,549
Lifecycle kWh Savings	9,129,574
Lifecycle Therm Savings	(17,731)
Current kWh Rate	\$ 0.19
Current Therm Rate	\$ 1.12
Average 1st Year Bill Savings / Treated households	\$ 20.02
Average Lifecycle Bill Savings / Treated Household	\$ 193.34

<b>Table 3B, ESA Program - CSD Leveraging</b>	
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	\$ -

<b>Table 3C, ESA Program - Multifamily Common Area</b>	
Annual kWh Savings	111,114
Annual Therm Savings	1,645
Lifecycle kWh Savings	991,449
Lifecycle Therm Savings	35,526
Current kWh Rate	\$ 0.19
Current Therm Rate	\$ 1.12
Average 1st Year Bill Savings / Treated Property	\$ 1,325.17
Average Lifecycle Bill Savings / Treated Property	\$ 13,192.95

<b>Table 3D, ESA Program - Pilot Plus <sup>2</sup></b>	
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	\$ -

<b>Table 3E, ESA Program - Pilot Deep <sup>2</sup></b>	
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	\$ -

<b>Table 3F, Summary - ESA Program (SF, MH, MF In-Unit)/CSD Leveraging/MF CAM/Pilot Plus and Pilot Deep</b>	
<b>1</b>	
Annual kWh Savings	970,016
Annual Therm Savings	14,194
Lifecycle kWh Savings	10,121,023
Lifecycle Therm Savings	17,795
Current kWh Rate	\$ 0.37
Current Therm Rate	\$ 2.23
Average 1st Year Bill Savings / Treated Households	\$ 1,345.18
Average Lifecycle Bill Savings / Treated Households	\$ 13,386.30

- 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  
September 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		54	54
San Diego	8,611	343,665	352,276	144	8,290	8,434
<b>Total</b>	<b>8,611</b>	<b>365,088</b>	<b>373,699</b>	<b>144</b>	<b>8,344</b>	<b>8,488</b>

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
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Table 4C, ESA Program - Multifamily Common Area						
	Eligible Properties [2]			Properties Treated YTD		
				Rural	Urban	Total
Orange	-	-	-	-	-	-
San Diego	-	-	-	-	17	17
<b>Total</b>					<b>17</b>	<b>17</b>

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

[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**  
**September 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)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January	440	-	6,726	1	-	-	-	-	-	440	8,137	1
February	65	1,800	21,388	3	-	-	-	-	-	65	1,800	3
March	166	1,116	48,941	6	-	-	-	-	7	4,265	173	7
April	1,289	389	103,315	14	-	-	-	-	79	9,940	1,368	15
May	1,859	2,875	152,365	20	-	-	-	-	189	20,098	2,048	22
June	1,037	1,797	89,686	12	-	-	-	-	91	9,969	1,128	13
July	757	970	59,425	7	-	-	-	-	51	6,629	808	8
August	733	2,401	108,746	14	-	-	-	-	80	19,598	2,401	16
September	1,925	752	181,541	24	-	-	-	-	160	22,286	3,208	27
October	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-
YTD	7,831	12,549	763,133	100	-	-	-	-	657	95,769	13,848	112

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 5A.  
**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)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January												
February												
March												
April												
May												
June												
July												
August												
September												
October												
November												
December												
YTD	-	-	-	-	-	-	-	-	-	-	-	0

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 5A.  
**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)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January	-	-	-	-	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-	2	2,208	0	0
March	1	(31)	10,608	2	-	-	0	-	1	(31)	10,608	2
April	1	(7)	677	0	-	-	2,867.28	0	2	(7)	5,544	1
May	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-
July	2	1,775	34,475	8	-	-	3,548	1	3	1,775	38,023	9
August	-	-	-	-	-	-	22,406	5	2	-	22,406	5
September	7	(93)	34,324	5	-	-	-	-	7	(93)	34,324	5
October	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-
YTD	11	1,645	80,084	15	-	-	31,030	7	17	1,645	111,114	22

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)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January												
February												
March												
April												
May												
June												
July												
August												
September												
October												
November												
December												
YTD	-	-	-	-	-	-	-	-	-	-	-	0

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 5B.  
**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**  
**September 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
<b>Pilots</b>															
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				0%	0%	0%
<b>Total Pilots</b>	\$ -	\$ -	\$ -			\$ -			\$ -				0%	0%	0%
<b>Studies</b>															
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	\$ 2,303	\$ 2,303	\$ 4,605	\$ 2,303	\$ 2,303	\$ 4,605	\$ 2,303	\$ 2,303	\$ 4,605	0%	0%	41%
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	\$ 4,750	\$ 4,750	\$ 9,500	\$ 37,919	\$ 37,919	\$ 75,839	\$ 40,222	\$ 40,222	\$ 80,444			25%
Joint IOU - Multifamily CAM Process Evaluation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				0%	0%	0%
Joint IOU - Process Evaluation Studies (1-4 Studies)	\$ -	\$ -	\$ 75,000												
<b>Total Studies</b>	\$ -	\$ -	\$ 798,750	\$ 7,053	\$ 7,053	\$ 14,105	\$ 40,222	\$ 40,222	\$ 80,444	\$ 42,524	\$ 42,524	\$ 85,049	0%	0%	10%

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  
September 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
<b>Demographic</b>									
Housing Type									
SF	170,522	3,177	2%	3,303	96%	30.41	0.004	-0.251	\$ 309
MH	22,468	665	3%	798	83%	43.30	0.005	3.615	\$ 381
MF In-Unit	179,480	4,646	3%	4,618	101%	35.75	0.005	0.178	\$ 268
Rent vs. Own									
Own	136,885	2,130	2%	12,342	17%	33.49	0.004	0.799	\$ 365
Rent	236,613	6,358	3%	32,256	20%	35.04	0.005	0.242	\$ 253
Previous vs. New Participant									
Previous	N/A	2,548	0%	N/A	0%	32.90	0.004	0.646	\$ 258
New Participant	N/A	5,940	0%	N/A	0%	35.09	0.005	0.423	\$ 332
Seniors	166,246	1,472	1%	N/A	0%	30.85	0.004	1.183	\$ 309
Veterans [4]	44,771	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A
Hard-to-Reach [5]	N/A	2,125	0%	N/A	0%	37.84	0.005	0.106	\$ 254
Vulnerable [6]	160,975	3,071	2%	19,734	16%	32.48	0.004	0.456	\$ 309
<b>Location</b>									
DAC	90,092	1,722	2%	10,740	16%	32.96	0.004	0.333	\$ 321
Rural	8,611	144	2%	2,012	7%	34.15	0.004	0.561	\$ 236
Tribal	21,716	61	0%	1,119	5%	49.48	0.008	-0.193	\$ 185
PSPS Zone	N/A	73	0%	1,153	6%	44.19	0.005	0.895	\$ 200
Wildfire Zone [15]	N/A	425	0%	7,952	5%	35.29	0.005	0.657	\$ 212
Climate Zone 1	16,775	42	0%	2,993	1%	56.48	0.007	-0.013	\$ 202
Climate Zone 2	244,028	5,553	2%	58,518	9%	32.75	0.004	0.249	\$ 307
Climate Zone 3	4,649	12	0%	982	1%	18.78	0.002	0.000	\$ 93
Climate Zone 10	99,636	2,841	3%	26,558	11%	36.07	0.005	0.948	\$ 308
Climate Zone 14	3,490	32	1%	544	6%	66.41	0.008	0.000	\$ 201
Climate Zone 15	1,084	8	1%	96	8%	59.25	0.008	0.856	\$ 194
CARB Communities [7]	293,478	1,323	0%	7,923	17%	36.840	0.005	0.718	\$ 345
<b>Financial</b>									
CARE	289,316	7,902	3%	73,531	11%	33.12	0.004	0.237	\$ 299
FERA	43,709	53	0%	828	6%	14.79	0.002	0.013	\$ 171
Disconnected [8]	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A
Arrearages [9]	N/A	3,594	0%	30,483	12%	35.03	0.003	0.272	\$ 268
High Usage [10]	N/A	699	0%	7,836	9%	23.90	0.003	-0.062	\$ 200
High Energy Burden [11]	132,033	1,532	1%	10,774	14%	33.62	0.004	0.485	\$ 290
SEVI [12]									
Low	275,414	955	0%	19,368	5%	39.97	0.005	0.241	\$ 281
Medium	318,131	2,422	1%	33,112	7%	36.69	0.005	0.581	\$ 320
High	243,149	5,078	2%	36,748	14%	30.96	0.004	0.508	\$ 304
Affordability Ratio [13]	35,421	886	3%	7,412	12%	26.18	0.003	0.132	\$ 215
<b>Health Condition</b>									
Medical Baseline	N/A	575	0%	4,875	12%	24.47	0.003	0.149	\$ 240
Respiratory [14]									
Low	283,333	2,781	1%	39,847	7%	39.79	0.005	0.589	\$ 302
Medium	195,497	2,972	2%	28,788	10%	31.08	0.004	0.500	\$ 299
High	113,025	2,702	2%	20,593	13%	30.99	0.004	0.360	\$ 317
Disabled	115,907	627	1%	N/A	0%	28.15	0.004	1.038	\$ 263

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 had a lead in 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, 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 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&amp;E defines arrearages as overdue balance greater than 30 days.

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

[11] SDG&amp;E utilizes the Low-Income Energy Affordability Data (LEAD) Tool developed DOE's Office of Energy Efficiency &amp; Renewable Energy to identify census tracts with high energy burden for households at below 200 % Federal Poverty Level (FPL) that are in PC&amp;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&amp;E utilizes the SEVI data provided by the CPUC to map its service territory by SEVI scores (L: 3.238 to 35.551; M: &gt;35.552 to 59.566 ; H: &gt;56.567).

[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&amp;E utilizes the 'Asthmas' indicator in CalEnviroScreen 4.0 (published by the California Office of Environmental Health Hazard Assessment) as a proxy to identify locations with varying levels of respiratory conditions within its service territory. L: 0-33 percentile; M: &gt;33-66 percentile; H: &gt;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
<b>Demographic</b>									
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%				
<b>Location</b>									
DAC			0%		0%				
Rural			0%		0%				
Tribal			0%		0%				
PSPS Zone			0%		0%				
Wildfire Zone			0%		0%				
Climate Zone 7 (example)			0%		0%				
Climate Zone 10 (example)			0%		0%				
Climate Zone 14 (example)			0%		0%				
Climate Zone 15 (example)			0%		0%				
CARB Communities			0%		0%				
<b>Financial</b>									
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%				
<b>Health Condition</b>									
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**  
**September 2022**

Partner	Brief Description of Effort	# of Referral	# of Leveraging	# of Coordination Efforts	# of Leads	# of En
LIHEAP	LIHEAP agencies in SDG&E service territory leverage LIHEAP payment leads to provide ESA Program services to customers.			N/A	1880	595
CSD	N/A					
DAC-SASH	The DAC-SASH implementer provides SDG&E with potential ESA and CARE Program Leads. SDG&E provides and annual list of program leads to DAC-SASH implementer for marketing purposes.				48	2
SDCWA	SDG&E provide SDCWA with a list of homes within their service territory that have received water and energy efficient measures.				N/A	N
CARE/Medical Baseline	CARE Online Enrollments are leveraged for ESA Program Enrollments.				20051	2227
CARE High Usage	Leads generated through CARE HEU income verifications completed			N/A	455	273
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*	27	143	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*	7	19	154	4

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  
September 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	5	Pauma Band, La Posta, Mesa Grande, Santa Ysabel, Jamul Indian Village
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	3	Juaneno Band of Mission Indians, San Luis Rey Band of Mission Indian, Kwaaymii
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  
 \*\*\*\* SDG&E does not provide service to Inaja & Cosmit

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

	Authorized Budget [1]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
CARE Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Outreach	\$ 2,848,906	\$ 388,487	\$ 3,237,393	\$ 314,549	\$ 35,327	\$ 349,876	\$ 1,633,759	\$ 199,506	\$ 1,833,265	57%	51%	57%
Processing / Certification Re-certification	\$ 517,082	\$ 70,511	\$ 587,593	\$ 30,935	\$ 3,474	\$ 34,409	\$ 896,349	\$ 111,220	\$ 1,007,569	173%	158%	171%
Post Enrollment Verification	\$ 401,678	\$ 54,774	\$ 456,452	\$ 4,401	\$ 494	\$ 4,895	\$ 51,779	\$ 6,385	\$ 58,164	13%	12%	13%
IT Programming	\$ 950,400	\$ 129,600	\$ 1,080,000	\$ 54,048	\$ 6,070	\$ 60,118	\$ 278,033	\$ 33,860	\$ 311,893	29%	26%	29%
Pilots	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
CHANGES Program [2]	\$ 233,200	\$ 31,800	\$ 265,000	\$ (121)	\$ (14)	\$ (135)	\$ 179,797	\$ 22,436	\$ 202,233	77%	71%	76%
Studies	\$ 94,793	\$ 12,926	\$ 107,719	\$ 8,043	\$ 903	\$ 8,946	\$ 27,713	\$ 3,334	\$ 31,047	0%	0%	29%
Regulatory Compliance	\$ 271,920	\$ 37,080	\$ 309,000	\$ 11,645	\$ 1,308	\$ 12,953	\$ 117,320	\$ 14,518	\$ 131,838	43%	39%	43%
General Administration	\$ 554,400	\$ 75,600	\$ 630,000	\$ 30,350	\$ 3,409	\$ 33,759	\$ 307,881	\$ 38,115	\$ 345,996	56%	50%	55%
CPUC Energy Division	\$ 59,741	\$ 8,147	\$ 67,888	\$ -	\$ -	\$ -	\$ 18,810	\$ 2,326	\$ 21,136	31%	29%	31%
<b>SUBTOTAL MANAGEMENT COSTS</b>	<b>\$ 5,932,120</b>	<b>\$ 808,925</b>	<b>\$ 6,741,045</b>	<b>\$ 453,850</b>	<b>\$ 50,971</b>	<b>\$ 504,821</b>	<b>\$ 3,511,441</b>	<b>\$ 431,700</b>	<b>\$ 3,943,141</b>	<b>59%</b>	<b>53%</b>	<b>58%</b>
CARE Rate Discount [3]	\$ 139,598,682	\$ 25,613,072	\$ 165,211,754	\$ 26,127,031	\$ 1,181,489	\$ 27,308,520	\$ 153,674,544	\$ 16,873,680	\$ 170,548,224	110%	66%	103%
<b>TOTAL PROGRAM COSTS &amp; CUSTOMER DISCOUNTS</b>	<b>\$ 145,530,802</b>	<b>\$ 26,421,997</b>	<b>\$ 171,952,799</b>	<b>\$ 26,580,881</b>	<b>\$ 1,232,460</b>	<b>\$ 27,813,341</b>	<b>\$ 157,185,985</b>	<b>\$ 17,305,380</b>	<b>\$ 174,491,365</b>	<b>108%</b>	<b>65%</b>	<b>101%</b>
Other CARE Rate Benefits												
- Wildfire Non-Bypassable Charge Exemption [4]				\$ 1,172,954	\$ -	\$ 1,172,954	\$ 7,094,251		\$ 7,094,251			
- CARE Surcharge Exemption				\$ 1,898,093	\$ 144,506	\$ 2,042,599	\$ 11,556,873	\$ 2,220,595	\$ 13,777,468			
- California Solar Initiative Exemption				\$ -	\$ -	\$ -	\$ -		\$ -			
- kWh Surcharge Exemption				\$ 120,139	\$ -	\$ 120,139	\$ 873,297		\$ 873,297			
- Vehicle Grid Integration Exemption				\$ 140,984	\$ -	\$ 140,984	\$ 794,847		\$ 794,847			
Total Other CARE Rate Benefits				<b>\$ 3,332,170</b>	<b>\$ 144,506</b>	<b>\$ 3,476,676</b>	<b>\$ 20,319,269</b>	<b>\$ 2,220,595</b>	<b>\$ 22,539,864</b>			
Indirect Costs				\$ 97,286	\$ 97,286	\$ 194,572	\$ 783,296	\$ 96,547	\$ 879,843			

- Budget authorized in D.21.06.015, Attachment 1 Table 2.
- The negative amount in CHANGES Program category is primarily related to the reversal of prior month accruals and true-up of estimate provided by the vendor.
- CARE Rate Discount amounts reflected in Advice Letters 3849-E and 3027-G-A, effective January 1st, 2022.
- 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  
September 2022

Month	New Enrollment										Recertification		Attrition (Drop Offs)					Enrollment		Total CARE Participants	Estimated CARE Eligible	Enrollment Rate % (W/X)	Total Residential Accounts <sup>5</sup>	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 <sup>1</sup>	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)							Net Adjusted (K-T)	
	Inter-Utility <sup>2</sup>	Intra-Utility <sup>2</sup>	Leveraging <sup>3</sup>	Combined (B+C+D)	Online	Paper	Phone	Capitation																			Combined (F+G+H+I)
January	-	13	-	13	6,400	1,774	491	207	8,872	8,885	2,339	4,054	397	8,790	3,236	1	148	1,883	5,269	15,675	3,616	324,289	289,316	112%	1,343,031	-	135,603
February	-	2	-	2	6,694	625	722	209	8,250	8,252	2,380	3,550	121	6,451	3,375	-	103	2,503	6,305	14,683	1,947	326,236	289,316	113%	1,345,729	-	136,037
March	-	2	-	2	6,568	650	623	190	8,031	8,033	1,236	3,555	4	4,795	4,354	1	34	3,113	7,502	12,828	531	326,767	289,316	113%	1,353,786	-	135,949
April	-	27	-	27	4,298	493	247	177	5,215	5,242	169	3,072	5	3,246	353	-	2	(13,152)	(12,795)	8,489	18,037	344,804	289,316	119%	1,359,584	-	142,530
May	-	46	-	46	4,753	572	325	119	5,769	5,817	92	3,463	5	3,540	289	-	4	4,963	5,256	9,257	561	345,365	289,316	119%	1,364,974	-	142,783
June	1	25	-	26	4,686	451	303	142	5,582	5,608	67	3,074	7	3,138	250	-	1	3,526	3,777	8,746	1,831	347,196	289,316	120%	1,370,237	-	143,470
July	-	17	-	17	5,058	270	223	193	5,654	5,671	155	3,587	17	5,170	375	1	19	3,467	3,553	10,847	1,618	349,014	289,316	121%	1,374,134	-	143,971
August	-	1	-	1	5,054	244	351	71	5,680	5,651	271	3,320	4	3,595	255	-	28	3,326	3,611	9,246	2,040	351,054	289,316	121%	1,381,357	-	144,652
September	15	5	-	20	5,400	352	315	145	6,212	6,232	699	3,504	7	4,210	132	6	43	3,156	3,337	10,442	2,895	353,949	289,316	122%	1,387,877	-	145,958
October	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	289,316	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	289,316	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	289,316	-	-	-	-
YTD Total	16	140	-	156	48,881	5,431	3,680	1,363	59,235	59,391	8,789	31,589	567	40,815	12,626	9	375	13,105	26,115	190,306	33,276	353,949	289,316	122%	1,387,877	-	145,958

<sup>1</sup> Enrollments via data sharing between the IOUs.  
<sup>2</sup> Enrollments via data sharing between departments and/or programs within the utility.  
<sup>3</sup> Enrollments via data sharing with programs outside the IOU that serve low-income customers.  
<sup>4</sup> No response includes no response to both Recertification and Verification.  
<sup>5</sup> Penetration Rate and Enrollment Rate are the same value.  
<sup>6</sup> Data represents total residential electric customers.  
<sup>7</sup> 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**  
**September 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	324,289	7	0.0%	2	-	2	29%	0%
February	326,236	12	0.0%	4	-	4	33%	0%
March	326,767	5	0.0%	4	-	4	80%	0%
April	344,804	4	0.0%	3	-	3	75%	0%
May	345,365	2	0.0%	1	-	1	50%	0%
June	347,196	804	0.2%	362	11	373	46%	0%
July	349,014	2,124	0.6%	53	23	76	4%	0%
August	351,054	2,679	0.8%	1	18	19	1%	0%
September	353,949	2,666	0.8%	1	8	9	0%	0%
October								
November								
December								
<b>YTD Total</b>	<b>353,949</b>	<b>8,303</b>	<b>2.3%</b>	<b>431</b>	<b>60</b>	<b>491</b>	<b>5.9%</b>	<b>0.1%</b>

**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**  
**September 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	324,289	1,961	0.6%	1734	15	1,749	89.2%	0.5%
February	326,236	383	0.1%	271	5	276	72.1%	0.1%
March	326,767	381	0.1%	231	3	234	61.4%	0.1%
April	344,804	220	0.1%	157	4	161	73.2%	0.0%
May	345,365	399	0.1%	303	2	305	76.4%	0.1%
June	347,196	299	0.1%	222	1	223	74.6%	0.1%
July	349,014	13	0.0%	9	-	9	69.2%	0.0%
August	351,054	188	0.1%	-	-	-	0.0%	0.0%
September	353,949	1,662	0.5%	-	5	5	0.3%	0.0%
October								
November								
December								
<b>YTD Total</b>	<b>353,949</b>	<b>5,506</b>	<b>1.6%</b>	<b>2,927</b>	<b>35</b>	<b>2,962</b>	<b>53.8%</b>	<b>0.8%</b>

**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  
September 2022**

County	Estimated Eligible Households <sup>1</sup>			Total Households Enrolled <sup>2</sup>			Enrollment Rate <sup>3</sup>		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Orange	16,607	-	16,607	15,339	-	15,339	92%	0%	92%
San Diego	266,215	6,494	272,709	330,896	7,714	338,610	124%	119%	124%
<b>Total</b>	<b>282,822</b>	<b>6,494</b>	<b>289,316</b>	<b>346,235</b>	<b>7,714</b>	<b>353,949</b>	<b>122%</b>	<b>119%</b>	<b>122%</b>

<sup>1</sup> 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.

<sup>2</sup> Total Households Enrolled includes submeter tenants.

<sup>3</sup> 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  
September 2022**

Month	Total CARE Households	Households Requested to Recertify	% of Households Total (C/B)	Households Recertified	Households De-enrolled <sup>1</sup>	Recertification Rate % (E/C)	% of Total Households De-enrolled (F/B)
January	324,289	5,515	1.7%	3,042	235	4.3%	0.1%
February	326,236	2,668	0.8%	1,536	179	6.7%	0.1%
March	326,767	124	0.0%	8	82	66.1%	0.0%
April	344,804	153	0.0%	10	84	54.9%	0.0%
May	345,365	58	0.0%	8	37	63.8%	0.0%
June	347,196	163	0.0%	12	133	81.6%	0.0%
July	349,014	295	0.1%	54	73	24.7%	0.0%
August	351,054	1,926	0.5%	490	51	2.6%	0.0%
September	353,949	3,325	0.9%	551	49	1.5%	0.0%
October							
November							
December							
<b>YTD</b>	<b>353,949</b>	<b>14,227</b>	<b>4.0%</b>	<b>5,711</b>	<b>923</b>	<b>40.1%</b>	<b>0.3%</b>

<sup>1</sup>Includes 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 Contractors<sup>1</sup>**  
**San Diego Gas & Electric**  
**September 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			134	1,252
ALPHA MINI MART	X				-	57
AMERICAN RED CROSS WIC OFFICES		X	X		-	2
CHULA VISTA COMMUNITY COLLABORATIVE		X			1	2
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			8	29
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			1	4
SCRIPPS HEALTH WIC		X			1	2
SOMALI BANTU ASSOCIATION OF AMERICA		X			-	-
SOMALI FAMILY SERVICES		X			-	-
VISTA COMMUNITY CLINIC		X				6
<b>Total Enrollments</b>					<b>145</b>	<b>1,363</b>

<sup>1</sup> 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**  
**September 2022**

CARE Program - Pilots and Studies	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
<b>Pilots</b>												
CARE Outbound Calling Pilot			\$ 80,000	\$ 1,362	\$ 151	\$ 1,513	\$ 1,550	\$ 172	\$ 1,723			2%
<b>Studies</b>												
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study			\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study			\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study			\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Joint IOU - Statewide CARE-ESA Categorical Study			\$ 11,250	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
<b>Total</b>	\$ -	\$ -	\$ 203,750	\$ 1,362	\$ 151	\$ 1,513	\$ 1,550	\$ 172	\$ 1,723			1%

**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**  
**September 2022**

Total CARE Households Enrolled				
Month	CARE Enrollment Rate for Zip Codes that have 10% or more disconnections [2]	CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG) [3]	CARE Enrollment Rate for Zip Codes in High Poverty (with 70% or Less CARE Penetration) [3][4]	CARE Enrollment Rate for DAC (Zip/Census Tract) Codes in High Poverty (with 70% or Less CARE Enrollment Rate)[1]
January				
February				
March				
April				
May				
June				
July				
August	N/A	122.71%	68.97%	N/A
September	N/A	123.58%	N/A	N/A
October				
November				
December				
YTD				

**Note:**

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.

[1] All DAC Zip Codes have a CARE Enrollment Rate > 70%

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

[3] Includes zip codes with >25% of customers with incomes less than 100% FPG

[4] All High Poverty Zip Codes have a CARE Enrollment Rate > 70% for the month of September.

**CARE Table 8A**  
**CARE Top 10 Lowest Enrollment Rates in High Disconnection, High Poverty, and DAC Communities by Zip**  
**Code**  
**San Diego Gas & Electric**  
**September 2022**

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes that have 10% or more Disconnections [1]
ZIP00001	N/A
ZIP00002	N/A
ZIP00003	N/A
ZIP00004	N/A
ZIP00005	N/A
ZIP00006	N/A
ZIP00007	N/A
ZIP00008	N/A
ZIP00009	N/A
ZIP00010	N/A

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG) [2]
92061	71%
92101	72%
91905	75%
92122	76%
92060	85%
92066	93%
92078	98%
92086	104%
92058	115%
92025	119%

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in DAC
91910	129%
92102	130%
92021	139%
91950	139%
92020	140%
92113	146%
91911	149%
92114	177%
92173	178%
92105	179%

**Note:**

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

[2] Includes zip codes with >25% of customers with incomes less than 100% FPG

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

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  
September 2022**

	Authorized Budget [1]	Current Month Expenses	Year to Date Expenses	% of Budget Spent YTD
<b>FERA Program:</b>	<b>Electric</b>	<b>Electric</b>	<b>Electric</b>	<b>Electric</b>
Outreach	\$ 361,080	\$ 34,108	\$ 135,741	38%
Processing / Certification Re-certification [3]	\$ 12,874	\$ (7,545)	\$ 14,147	110%
Post Enrollment Verification	\$ 923	\$ 110	\$ 579	63%
IT Programming	\$ 151,500	\$ 2,065	\$ 11,746	8%
Pilot(s)	\$ -	\$ -	\$ -	0%
Studies	\$ 50,000	\$ -	\$ -	0%
Regulatory Compliance	\$ 44,660	\$ 4,316	\$ 39,741	89%
General Administration	\$ 71,930	\$ 1,311	\$ 21,369	30%
CPUC Energy Division	\$ 10,183	\$ -	\$ 4,227	42%
<b>SUBTOTAL MANAGEMENT COSTS</b>	<b>\$ 703,150</b>	<b>\$ 34,365</b>	<b>\$ 227,550</b>	<b>32%</b>
FERA Rate Discount [2]	\$ 3,711,343	\$ 598,298	\$ 3,546,259	96%
<b>TOTAL PROGRAM COSTS &amp; CUSTOMER DISCOUNTS</b>	<b>\$ 4,414,493</b>	<b>\$ 632,663</b>	<b>\$ 3,773,809</b>	<b>85%</b>
Indirect Costs		\$ 2,966	\$ 45,242	

1. Budget approved in D.21-06-015, Attachment 1, Table 4.

2. FERA Discount amount reflected in Advice Letter 3849-E, effective January 1, 2022.

3. The negative amount in Processing is due to adjustments completed in September to move contractor costs supporting CARE program from FERA.

\*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**  
**September 2022**

	New Enrollment										Recertification					Attrition (Drop Offs)					Enrollment		Total FERA Participants <sup>5</sup>	Estimated FERA Eligible	Enrollment <sup>6</sup> Rate % (W/X)
	Automatic Enrollment				Self-Certification (Income or Categorical)						Total New Enrollment (E+J)	Non-Scheduled (Duplicates)			Total Recertification (L+M+N)	No Response <sup>6</sup>	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)			
	Inter-Utility <sup>1</sup>	Intra-Utility <sup>2</sup>	Leveraging <sup>3</sup>	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)	Scheduled		Scheduled (Duplicates)	Automatic												
January	-	-	-	-	175	39	14	5	233	233	6	39	-	45	208	-	53	(282)	(21)	278	254	11,737	43,709	27%	
February	-	-	-	-	245	16	28	5	294	294	4	47	-	51	173	-	36	237	446	345	(152)	11,585	43,709	27%	
March	-	-	-	-	256	10	26	-	292	292	2	47	-	49	64	-	16	197	277	341	15	11,600	43,709	27%	
April	-	-	-	-	161	19	7	3	190	190	-	33	-	33	4	-	14	(727)	(709)	223	899	12,499	43,709	29%	
May	-	-	-	-	154	19	7	-	180	180	1	45	-	46	2	-	6	259	267	226	(87)	12,412	43,709	28%	
June	-	-	-	-	89	11	6	1	107	107	-	25	-	25	2	-	-	243	245	132	(136)	12,274	43,709	28%	
July	-	-	-	-	120	8	5	1	134	134	4	23	-	27	2	-	3	234	239	161	(105)	12,169	43,709	28%	
August	-	-	-	-	100	5	12	-	117	117	1	30	-	31	-	1	14	200	215	148	(98)	12,071	43,709	28%	
September	-	-	-	-	210	1	12	-	223	223	1	71	-	72	4	-	20	124	148	295	75	12,146	43,709	28%	
October	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
November	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
December	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
YTD Total	-	-	-	-	1,510	128	117	15	1,770	1,770	19	360	-	379	459	1	162	485	1,107	2,149	663	12,146	43,709	28%	

<sup>1</sup> Enrollments via data sharing between the IOUs.

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

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

<sup>4</sup> No response includes no response to both Recertification and Verification.

<sup>5</sup> Penetration Rate and Enrollment Rate are the same value.

<sup>6</sup> 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**  
**September 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	11,737	-	0.0%	-	-	-	0.0%	0.0%
February	11,585	1	0.0%	-	-	-	0.0%	0.0%
March	11,600	-	0.0%	-	-	-	0.0%	0.0%
April	12,499	-	0.0%	-	-	-	0.0%	0.0%
May	12,412	-	0.0%	-	-	-	0.0%	0.0%
June	12,274	45	0.4%	-	1	1	2.2%	0.0%
July	12,169	62	0.5%	-	1	1	1.6%	0.0%
August	12,071	78	0.6%	-	2	2	2.6%	0.0%
September	12,146	66	0.5%	-	1	1	1.5%	0.0%
October								
November								
December								
<b>YTD Total</b>	<b>12,146</b>	<b>252</b>	<b>2.1%</b>	<b>-</b>	<b>5</b>	<b>5</b>	<b>2.0%</b>	<b>0.0%</b>

**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)**  
**San Diego Gas & Electric**  
**September 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	11,737	-	0.0%	-	-	-	0.0%	0.0%
February	11,585	-	0.0%	-	-	-	0.0%	0.0%
March	11,600	-	0.0%	-	-	-	0.0%	0.0%
April	12,499	-	0.0%	-	-	-	0.0%	0.0%
May	12,412	-	0.0%	-	-	-	0.0%	0.0%
June	12,274	-	0.0%	-	-	-	0.0%	0.0%
July	12,169	-	0.0%	-	-	-	0.0%	0.0%
August	12,071	-	0.0%	-	-	-	0.0%	0.0%
September	12,146	-	0.0%	-	-	-	0.0%	0.0%
October								
November								
December								
<b>YTD Total</b>	<b>12,146</b>	<b>-</b>	<b>0.0%</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0.0%</b>	<b>0.0%</b>

**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  
September 2022**

County	Estimated Eligible Households			Total Households Enrolled <sup>1</sup>			Enrollment Rate <sup>2</sup>		
	Urban	Rural	Total	Urban	Rural <sup>3</sup>	Total	Urban	Rural	Total
Orange	2,102	-	2,102	466	-	466	22%	0%	22%
San Diego	40,415	1,192	41,607	11,384	296	11,680	28%	25%	28%
<b>Total</b>	<b>42,517</b>	<b>1,192</b>	<b>43,709</b>	<b>11,850</b>	<b>296</b>	<b>12,146</b>	<b>28%</b>	<b>25%</b>	<b>28%</b>

<sup>1</sup> Total Households Enrolled includes submeter tenants.

<sup>2</sup> 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  
San Diego Gas & Electric  
September 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	11,737	133	1.1%	-	51	0%	0.4%
February	11,585	78	0.7%	4	19	5%	0.2%
March	11,600	26	0.2%	-	3	0%	0.0%
April	12,499	51	0.4%	-	3	0%	0.0%
May	12,412	8	0.1%	-	-	0%	0.0%
June	12,274	4	0.0%	-	4	0%	0.0%
July	12,169	6	0.0%	1	3	17%	0.0%
August	12,071	76	0.6%	3	17	4%	0.1%
September	12,146	156	1.3%	2	17	1%	0.1%
October							
November							
December							
<b>YTD</b>	<b>12,146</b>	<b>538</b>	<b>4.4%</b>	<b>10</b>	<b>117</b>	<b>1.9%</b>	<b>1.0%</b>

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

**FERA Table 6 - Capitation Contractors<sup>1</sup>**  
**San Diego Gas & Electric**  
**September 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				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			-	-
<b>Total Enrollments</b>					-	<b>15</b>

<sup>1</sup> 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.