

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

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

And Related Matters.

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

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

**AMENDED MONTHLY REPORT OF SAN DIEGO GAS & ELECTRIC COMPANY
(U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR MAY 2023**

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June 23, 2023

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**AMENDED MONTHLY REPORT OF SAN DIEGO GAS & ELECTRIC COMPANY
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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 (ED) with information to assist in analyzing the low income programs.¹ This is the monthly report for program year (PY) 2023, and presents year-to-date CARE, FERA, and ESA Program results and expenditures through May 31, 2023, for San Diego Gas & Electric Company (SDG&E). SDG&E notes that the purpose of this amended report is to correct two items. First, to include complete FERA Tables 3A and 3B, which were inadvertently incomplete in the original report. Second, to correct the order of FERA Table 4, which was incorrectly positioned between FERA Tables 5 and 6 in the original report. SDG&E apologizes for any inconvenience this may have caused.

Respectfully Submitted,

/s/ Siobhán E. Murillo

Siobhán E. Murillo

Attorney for:

SAN DIEGO GAS & ELECTRIC COMPANY

June 23, 2023

¹ Pursuant to Decision (D.) 21-06-015, SDG&E will file monthly Family Electric Rate Assistance (FERA) reports, combined with this report, after the ED approval of a reporting template that includes the specifics of FERA reporting criteria. See D.21-06-015 at 435.



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, 2021.² The authorized program year budgets, savings goals, and homes treated targets in this monthly report reflect those authorized by the Commission in D.21-06-015 (Decision).³ The Decision approved the Investor-Owned Utilities (IOUs) to shift the ESA Program away from treating all eligible and willing households towards a customer-centered prioritization model based on household needs and customer profile.⁴ Additionally, the Decision ordered the implementation of a new ESA Multifamily Whole Building Program (MFWB), which includes all multifamily sectors, including in-unit, common areas, and the whole building,⁵ and the implementation of the Pilot Plus and Pilot Deep Program that focuses on gathering the feasibility of a more strategic measure delivery approach.⁶

² D.21-06-015 at Ordering Paragraph (OP) 3 and at OP 82.

³ *Id.*

⁴ *Id.* at OP 57.

⁵ *Id.* at OP 119.

⁶ *Id.* at OP 38.

1. ESA PROGRAM EXECUTIVE SUMMARY

1.1. ESA Program Overview

The Main 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 of customers. To qualify for the ESA Program, a residential customer's household income must be at, or below, 250% of Federal Poverty Guidelines (FPG). The Main ESA program focuses on providing services to single family and mobile homeowners and renters. Per the Decision, SDG&E will continue to serve multifamily in-unit tenants through the Main ESA Program until the MFWB program is open for customer enrollment.⁷

The ESA Common Area Measures (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. SDG&E will continue to offer ESA CAM services through June 30, 2023. Leads received after June 30, 2023, will be treated under the Southern MFWB Program, which will begin enrollment services on July 1, 2023.

SDG&E's MFWB Program offers ESA Services for In-Unit, CAM, and Whole Building Measures under one Program to Deed Restricted and Non-Deed Restricted multifamily buildings. SDG&E was selected as the lead utility on behalf of Southern California Edison

⁷ *Id.* at OP 128.

(SCE) and Southern California Gas (SoCalGas) Company for the Southern Region MFWB program.⁸

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%.

This monthly report reflects current program activities for the ESA Programs. Significant program changes are expected in July 2023 with the implementation of the MFWB Program. SDG&E will continue to provide all relevant program implementation updates in subsequent reports.

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

Main ESA Program

For 2023, SDG&E transitioned the Main ESA Program to an implementer model, "bundling" Outreach and Assessment, Weatherization, Appliance Installation, Natural Gas Appliance Testing (NGAT) and Inspections of gas appliance installation through one ESA program contractor. The transition to the new model provided SDG&E with the opportunity to

⁸ *Id.* at OP 120.

streamline the delivery of the program and increase opportunities for the installation of energy savings measures by reducing the number of customer visits needed. In 2022, SDG&E conducted a one-stage, two-step solicitation for the delivery of the Main ESA Program and awarded the Main ESA Program Contract for program years 2023-2026 for bundled services to Richard Heath and Associates (RHA).

In February, SDG&E reported that RHA was experiencing a delay in fulfilling appliance installations. In March, RHA implemented a contingency plan to begin installations and worked to resolve customer backlog issues. RHA secured a new supplier to meet quantity needs and handle deliveries in-house. Additionally, RHA continued to work on partnerships with appliance suppliers to support program demands.

In March 2023, RHA and SDG&E continued to focus on ramp up activities including updates to program systems to support invoicing activities, tracking and program reporting, finalization of documents, onboarding subcontractors, and training. RHA processed 291 program enrollments for distribution to subcontractors, including weatherization and appliance installations.

In April 2023, RHA and SDG&E were able to resolve and overcome most challenges related to the transition to the single implementer model. SDG&E collaborated with RHA to continue to address and resolve implementation challenges and make positive progress towards resolving outstanding issues. RHA was able to begin the delivery and installation of electric appliances, delivering 52 refrigerators and 12 washers. Additionally, RHA sent 307 jobs to subcontractors for weatherization services.

In May 2023, SDG&E faced system challenges that caused delays in processing the payment of invoices to RHA. RHA and SDG&E have implemented weekly meetings to discuss

issues and delays and to identify short-term and long-term solutions to mitigate current and future issues. SDG&E expects payment issues to be resolved in June and will provide updates on these issues in future monthly reports. RHA reported 823 new enrollments in May.

As noted in prior monthly reports, the process of integrating home audits and energy savings kits into the ESA delivery model has been delayed. The home audit tool is expected to launch by July 2023 and energy savings kits are expected to be available in the third quarter of 2023.

SDG&E's solicitation for Heating, Air Conditioning and Ventilation, and water heater repair and replacements (R&R Services) closed on March 2, 2023. The evaluation team reviewed and scored all qualified proposals, and interviews with bidders were completed in April 2023. SDG&E contract negotiations with bidders commenced May 2023 and will continue through June 30, 2023. SDG&E will continue to offer R&R services through its current contractor networks through July 31, 2023. An extension of the current contracts may be required if the new contracts have not been fully executed.

ESA (SF, MH, MF In-Unit) Program Summary Expenses for 2023⁹			
	2023 Authorized / Planning Assumptions	Actual to Date¹⁰	%
Budget	\$19,818,827	\$6,261,191	32%
Homes Treated	8,326	1,058	13%
kWh Saved	1,997,137	110,588	6%
kW Demand Reduced	166	8	5%
Therms Saved	74,629	1,032	1%
GHG Emissions Reduced (Tons)	N/A	67	N/A

SDG&E extended the program contract with its current ESA CAM implementer through June 30, 2023, to continue to deliver common area measures to deed restricted properties while the ESA MFWB Program opens for customer enrollments on July 1, 2023. SDG&E's CAM implementer began referring MF projects that cannot be completed by July 1 to the MFWB implementer. SDG&E will work closely with the ESA CAM and MFWB program implementers to create a smooth transition to the new program. The table below provides a summary of the year-to-date activity for the CAM Program.

⁹ The budget includes \$2,166,111 in multifamily funds to continue in-unit treatment through the Main ESA Program until the MFWB program is open for enrollment. Total multifamily in-unit and multifamily whole building 2023 budget is \$7,864,581. The savings planning assumptions in this table reflect single family and mobile home savings goals for 2023, along with multifamily in-unit savings between January and June 2023.

¹⁰ The numbers are based on invoices received and processed year-to-date and may not reflect all completed program activities.

ESA MF CAM Program Summary Expenses for 2023			
	2023 Authorized / Planning Assumptions¹¹	Actual to Date	%
Budget	\$2,808,028	\$1,933,737	69%
Properties Treated	N/A	5	0
kWh Saved	N/A	93,716	0
kW Demand Reduced	N/A	19	0
Therms Saved	N/A	2,114	0

In compliance with D.21-06-015, SDG&E conducted the MFWB Solicitation, a one stage request for proposal (RFP), two steps (RFP response + Interview), on behalf of the three Southern IOUs (SDG&E, SCE and SoCalGas). The solicitation process included an Independent Evaluator (IE) tasked with monitoring and reporting on the ESA MFWB solicitations, and a statewide Procurement Review Group to oversee the IOUs' ESA MFWB solicitation process, review procedural fairness and help promote transparency. Bidder proposals were due on April 13, 2022, and through a competitive Solicitation process, SDG&E selected RHA to implement the Southern ESA MFWB Program in SDG&E, SCE, and SoCalGas' service territories for Program Years 2023 through 2026. The Southern MFWB Program will be Open for Customer Enrollment on July 1, 2023.

In May 2023, SDG&E continued working with RHA on program ramp-up activities including, but not limited to, measure specification updates, customer acquisition plan, program forms, data collection plan, and program database development. RHA will transition to in-unit

¹¹ D.21-06-015 directs the IOUs to carry-forward all unspent and uncommitted ESA Common Area Measures funding as of June 30, 2021, into the remainder of program year 2021 and 2022. The unspent funds at the end of December 31, 2022, totaled \$2,808,028, to be used for 2023, during the transition to the MFWB Program.

leads, currently offered through the Main ESA program, and SDG&E's ESA CAM Implementer will also send leads to the Southern MFWB Program in July, when the MFWB program is expected to be open for customer enrollment. The table below includes SDG&E specific budgets/planning assumptions and actuals year to date for the Southern MFWB Program.

ESA MFWB (MF In-Unit, MF CAM, MFWB) Program Summary Expenses for 2023¹²			
	2023 Authorized / Planning Assumptions	Actual to Date	%
Budget	\$5,698,470	\$45,158	1%
Properties Treated	18	0	0
In-Units Treated	3,385	0	0
kWh Saved ¹³	426,674	0	0
Therms Saved	22,376	0	0

Pilot Plus/Pilot Deep (ESA Whole Home)

Due to an insufficient number of responsive proposals from the first RFP event in Q1 – Q2 2022, SDG&E was granted an extension of time to meet the requirements of launching the Pilot Plus and Pilot Deep Program. The subsequent RFP event was revised for Pilot Plus and Pilot Deep 2.0 and was issued in Q4 of 2022.

SDG&E shared the Pilot Plus and Pilot Deep 2.0 RFP scoring criteria with the Energy Division on January 10. The second round of RFP Bidders Questions was due on January 6 and a

¹² The budget excludes \$2,166,111 in multifamily funds to continue in-unit treatment through the Main ESA Program until the MFWB program is open for enrollment. Total multifamily in-unit and multifamily whole building 2023 budget is \$7,864,581.

¹³ Savings goals for the MFWB are based on the program cycle years 2023-2026. The planning assumptions reflected in this table takes into consideration the 2023 MFWB ramp up period.

total of five questions were submitted. The responses were posted on PowerAdvocate on January 11. There were 91 registered bidders and nine participants on the Interested Organizations Form when the RFP event closed on January 26. SDG&E has initiated the assessment and scoring process of the submitted proposals.

On February 2, 2023, SDG&E informed the Energy Division of the status of the Pilot 2.0 solicitation responses via email. SDG&E's Evaluator Team members completed the scoring and evaluation process of the qualified RFP responses and held interviews with the qualified Bidders during the week of February 20. A survey was sent to the registered Bidders who did not submit proposals to gain insight into their decision not to participate. Their feedback was due on March 1, 2023.

Results from the Bidder interviews in February were discussed with the Energy Division on March 10, 2023. A successful Bidder was not identified. Additionally, SDG&E shared the results of the anonymous survey of registered Bidders who bid but ultimately did not submit proposals. Two subsequent discussions were held with the Energy Division on March 17, 2023, and March 30, 2023, to review compliance requirements and determine the next steps with the Pilot solicitation.

During April 2023, SDG&E researched potential options for another Pilot Plus and Pilot Deep solicitation. On April 19, 2023, SDG&E informed the Energy Division that SDG&E intended to submit an Advice Letter (AL) in May with proposed next steps for the Pilot solicitation. As such, on May 9, 2023, SDG&E served AL 4223E/3196-G, requesting to modify the solicitation requirements in D.21-06-015, Ordering Paragraph 107 from an open competitive bidding process to sole sourcing to enter contract negotiations with a potential Pilot Implementer. The AL is pending a disposition.

As such, on May 31, 2023, SDG&E submitted a second extension of time to comply with OP 42 and Attachment 2 of D.21-06-015. The request seeks to move the pilot launch from the end of second quarter of 2023, which was approved pursuant to SDG&E’s first extension request, to no later than the first quarter of 2024, which will allow time for SDG&E to complete the Request for Quotation and enter contract negotiations with a sole-sourced Pilot implementer.

The table below includes SDG&E specific budgets/planning assumptions and actuals year to date for the Pilot Plus and Pilot Deep.

ESA Pilot Plus and Pilot Deep 2.0 Summary Expenses for 2023			
	2023 Authorized / Planning Assumptions	Actual to Date	%
Budget ¹⁴	\$1,526,683	\$46,100	3%
Homes Treated	TBD	0	0
kWh Saved	TBD	0	0
kW Demand Reduced	TBD	0	0
Therms Saved	TBD	0	0
GHG Emissions Reduced (Tons)	N/A	0	0

SASH/MASH Budget Augmentation

In 2022, SDG&E identified that the Multifamily Affordable Solar Housing and Single Family Affordable Solar Homes Programs (MASH and SASH) had remaining unspent and unencumbered funds available to augment future ESA Program measure installations. SDG&E, along with SCE, and PG&E, have updated the timing of the Tier 2 AL filing that will include information on the remaining MASH and SASH funds to be used for ESA Program installations.

¹⁴ Includes the annual program funds, as listed in D.21-06-015, Attachment 1, Table 11. Additional funds from program year 2022 are available for program activities exceeding the annual estimated budget.

The AL is expected to be filed in August of 2023. SDG&E intends to report how those funds are allocated to augment ESA Program funds in a future report.

Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Unspent Funds (Electric IOUs Only)¹⁵			
	2023 Authorized	Actual to Date	%
Budget	N/A	0	0

1.1.2. Program Measure Changes

If applicable, discuss any measure changes that may have taken place in ESA (SF, MF In-Unit, MH), MF CAM, ESA Pilot Plus and Pilot Deep 2.0, and/or ESA BE during this reporting month.

SDG&E did not make any measure changes in May.

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.

As part of the new ESA Program strategy, RHA has implemented outreach efforts focused on targeting customers with the greatest needs and integrating measure packages into the program delivery to drive deeper energy savings. As part of outreach efforts, RHA educates customers on the importance of energy efficiency, available measure packages, enrollment requirements, and program engagement process. To provide a positive program experience, RHA

¹⁵ OP 12 of D.15-01-027 states, "The Program Administrators shall ensure that program expenditures in each utility's service territory do not exceed the total authorized budget amounts over the duration of the programs. The program incentive budgets will be available until all funds are exhausted or until December 31, 2021, whichever occurs first. Any money unspent and unencumbered on January 1, 2022, shall be used for 'cost-effective energy efficiency measures in low income residential housing that benefit ratepayers,' as set forth in Public Utilities Code Section 2852(c)(3)." The electric IOUs intend to file a Joint Advice Letter for disposal of unspent funds from the SASH and MASH programs to the ESA Program in Q1 of 2023. After the AL is filed, budget authorization will be pending per the Energy Division's disposition of the AL.

provides customers with next steps in the process, anticipated timelines, and any possible delays in program installations.

As part of May outreach activities, RHA conducted targeted door-to-door canvassing, performed outbound calls to targeted customers from generated lead lists, and followed up on program leads generated through SDG&E targeted marketing campaigns. RHA's estimated number of enrollments for May is over 800 enrollments.

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

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. One property was treated this month for a total of five properties in 2023 thus far. Five properties are currently receiving measure installations and no properties are pending energy assessments/audits. The Program will be closing on June 30, 2023, and replaced with the Southern Multifamily Whole Building (MFWB).

ESA Program MFWB (MF In-Unit, MF CAM, MFWB)

The ESA Southern MFWB Program will be Open for Customer enrollment on July 1, 2023.

ESA Pilot Plus and Pilot Deep

Implementation timeline for the ESA Pilot Plus and Pilot Deep is still pending.

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. Two customers were served by the Language Line this month.

Language	Calls
Vietnamese	1
Mandarin	1
Total	2

Tribal Outreach

SDG&E's Outreach and Tribal Relations teams work together to effectively engage and communicate with the 17 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. SDG&E Outreach has sent requests to meet with all 17 tribes and has met with 13 of the tribes. SDG&E is continuing its outreach efforts to meet with all tribes in its service territory and re-visits with the 13 tribes periodically to ensure they have program information and support needed. In addition, SDG&E is exploring further ways to enhance outreach plans for 2023 to provide mini grants to ~7 of the tribes, which have been identified as those who have tribal members potentially eligible for Customer Assistance programs. These mini grants will provide SDG&E the opportunity to increase collaboration with an assigned point of contact to further drive awareness and

enrollments in eligible programs. Presentations and trainings will continue to be offered to ensure the tribal staff is effectively disseminating Customer Assistance program information to their members. Based on feedback from tribes, SDG&E will also work with tribal staff to participate in Food Distribution and Elder events to increase support for low-income tribal members.

Additionally, 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 (ME&O) for the CARE 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 2023 campaign intends to connect with customers to drive conservation and provide monthly savings on their energy bill. General tactics, such as TV and over the top (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.

General Awareness Marketing

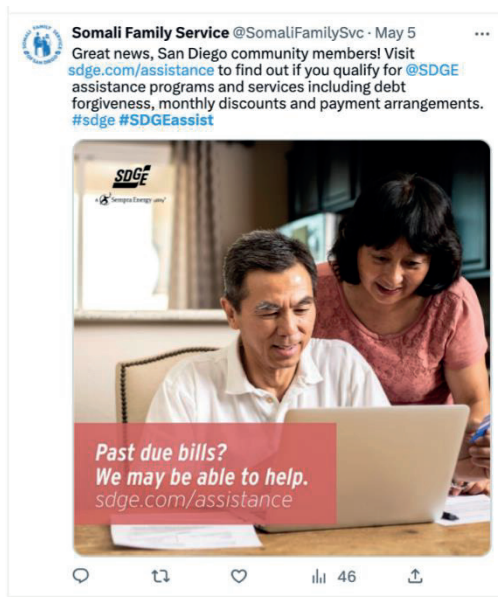
General awareness marketing allows SDG&E to connect with its customers through mass media efforts reaching both mass audiences and hard-to-reach populations, including customers in rural areas, seniors, customers with special needs, and multilingual/multicultural customers.

Online Advertising

In May 2023, SDG&E ran paid search in English and Spanish garnering 20,639 impressions (views) with a 26% CTR and 506 conversions.¹⁶

Social Media

Using e-newsletters, website posts, and social media channels, the Energy Solutions Partner Network shared more than 190 customer assistance messages to an audience of more than 444,000 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.



¹⁶ Conversions are customers who click 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.

Direct Marketing

In May, SDG&E sent over 9,900 emails and 655 postcards to CARE high-use customers promoting the ESA program and encouraging customers to fill out a lead form. The email had a 56% open rate and a 7% click-through rate. After three days, customers who did not open the email were sent a remarket, which garnered a 20% open rate with a 2% CTR.

Live CARE Call Campaign

SDG&E's third-party contractor, The Harris Group (THG), called targeted customers to enroll in the CARE Program.¹⁷ The campaign provides SDG&E with a way to directly connect with customers in low income and hard-to-reach areas. Targeted customers also include those who are up for recertification for CARE and FERA. THG provides education about the CARE, FERA, and ESA Programs and if eligible, will enroll customers over the phone, except for ESA.

The Harris Group	
ESA Leads	3,558
CARE Enrollments	1,915
CARE Recertifications	605
FERA Enrollments	67
FERA Recertifications	3

¹⁷ THG is a Diverse Business Enterprise (DBE) vendor and a woman-owned business.

Community Outreach & Engagement

Energy Solutions Partner Network

SDG&E works closely with a network of approximately 200 community-based organizations (CBOs) to connect customers with programs, resources and solutions related to Customer Assistance, bill debt relief, Public Safety Power Shutoff resiliency, wildfire preparedness, clean energy, and conservation. These organizations represent the diversity of SDG&E's customers within its service territory. Many of these CBOs are small, grassroots agencies serving individuals with access and functional needs, including those that are multicultural, multilingual, low income, seniors, and limited English proficient (LEP) audiences in communities of concern. These partners help educate and enroll customers in low income programs utilizing a variety of tactics, including messaging through email and social media channels such as Facebook, Twitter, and Instagram, posting information on their websites, providing booth space at events, and hosting enrollment day fairs at their locations. SDG&E's partner outreach activities resulted in the following activities this month:

Energy Solutions Partner Network	
ESA Leads	0
CARE Enrollments	4
CARE Recertifications	1
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, and community events. These outreach activities were focused on engaging customers with programs and solutions such as CARE, FERA, and ESA and reached over 5,600 people. A few of the outreach events SDG&E participated in are highlighted below.

La Maestra

On May 5, 2023, La Maestra Community Health Centers held their 100th Anniversary Health Fair. La Maestra provides services to all San Diegans seeking family planning or related health and wellness services. SDG&E Outreach attended the Health Fair promoting Customer Assistance including CARE, FERA and MBL.

La Posta Band of Diegueno Mission Indians

La Posta Tribe in San Diego hosted its 20th Annual Earth Day Celebration on May 13, 2023. This event included many informational vendors, fire department, and educational presentations. The SDG&E Outreach team attended the celebration promoting CARE, FERA, ESA and other initiatives. La Posta Indian Reservation is in The High Fire Threat District, which provided an opportunity for the Outreach team to share information on wildfire preparedness and safety.

Multicultural Outreach

To continue efforts to reduce potential barriers, 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:

Activity Date	Activity Title	Partner/Host	Location
5/5/2023	La Maestra's 100th Anniversary Health Fair	La Maestra Community Health Centers	La Maestra Community Health 4060 Fairmount Ave, San Diego CA 92105
5/13/2023	La Posta Annual Earth Day (La Posta Tribe)	La Posta	La Posta Gym 812 Crestwood Rd. Boulevard, CA 91950
5/20/2023	Mental Health Fair	PNASD (Philippines Nurse Association of San Diego County)	Sweetwater Union High School 2900 Highland Ave, National City CA 91905
5/27/2023	AAPI Festival	Union of Pan Asian Communities San Diego (UPAC)	La Maestra Community Health Centers 4147 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.

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

	CCC	Branch Office
ESA Leads	6	0
CARE Enrollments	0	51
CARE Recertifications	10	23
FERA Enrollments	0	0
FERA Recertifications	0	0

1.2.3. Managing Energy Use

As part of the delivery of the ESA Programs In-Home Energy Education, customers are provided with information about tools and services available to help manage and reduce energy use, which includes a review of both energy and water savings tips. Customers who are not already enrolled in My Account will be enrolled and provided with an overview of the tools and tips available to them to help manage energy use. During In-Home Assessment, the field

specialist reviews the setting of the various appliances and explains to the customer how to maximize the settings to reduce energy usage. Lastly, during the installation of smart thermostats, customers are provided with information on how to set-up the thermostat to help manage and reduce energy usage.

1.2.4. Services to Reduce Energy Bill

As part of SDG&E's measure mix, Tier II power strips and smart thermostats are available for installation to eligible customers. These measures provide customers with energy management technology that help reduce energy bills. A total of 341 Tier II power strips were installed and 30 smart thermostats were reported through the month of May.

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

SDG&E continues to leverage CARE and FERA to improve ESA Program participation. Customers using the joint CARE/FERA application are leveraged to generate ESA Program leads that are sent directly to the ESA Program implementer. With the new targeted strategy for ESA Program enrollments, SDG&E continues to review and evaluate the current CARE/FERA lead generating processes to make improvements that support the ESA Program goal of delivering energy savings and providing customers with health, comfort, and safety.

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

CETF had the opportunity to review 2022 achievements and discuss next steps to continue effective engagement through its Marketing, Outreach and Education channels. Quarterly follow-up meetings will be scheduled with CETF to ensure future and ongoing collaboration.

SDG&E Power Saver Rewards Program and Smart Thermostat provide customers with the opportunity to participate in SDG&E's Demand Response programs. No new activities occurred in May. RHA will integrate the Power Rewards and Smart Thermostat Program into ongoing contractor training and into the delivery of In-Home Energy education prior to the peak summer months.

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?

As part of the transition to the implementer model, SDG&E ceases contracting individually with local LIHEAP agencies. However, RHA is subcontracting with both San Diego LIHEAP contractors, MAAC and Campesinos Unidos, to continue leveraging enrollment efforts. SDG&E and RHA continue to work on new reporting templates to provide details on enrollments attributed to enrollment partnerships with LIHEAP agencies. RHA reported no leveraged customer enrollments with LIHEAP in May.

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.

SDG&E did not implement any new WE&T initiatives in May 2023. SDG&E and RHA continue to collaborate to enhance efforts to recruit from local communities and expand the

WE&T program. There were no new hires in May. RHA continues to provide training on the new Main ESA program for all existing program staff.

1.5. Studies and Pilots

1.5.1. ESA Program Studies

2025 Low Income Needs Assessment (LINA) Study

In May 2023, the IOUs and the Energy Division continued to meet to discuss and refine the work scope for the study.

Categorical Eligibility Study

A public webinar was held on May 23rd to present the results of the study. The report was posted on the Commission's public document website and comments were solicited from stakeholders. Responses to stakeholder comments will be provided in June along with the final report.

1.5.2. ESA Program Pilot

SDG&E is not currently conducting any pilot studies.

2. CARE EXECUTIVE SUMMARY

2.1. CARE Program Summary

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.¹⁸ The CARE Program currently provides a 20% discount on natural gas charges and a 30 – 35% discount on electric rates.¹⁹ To qualify for the CARE Program, eligible customers must have a total household gross income no greater than 200% of the FPG.

2.1.1. Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget	Actual Expenses to Date	% of Budget Spent
Outreach	\$3,293,966	\$847,038	26%
Proc., Certification and Re-	\$611,097	\$767,522	126%
Post Enrollment Verification	\$474,710	\$48,362	10%
Information Tech./Programming	\$1,109,400	\$249,764	23%
Pilots	\$0	\$0	0%
CHANGES Program	\$265,000	\$91,637	35%
Studies	\$18,605	\$19,737	106%
Regulatory Compliance	\$318,250	\$87,252	27%
General Administration	\$761,500	\$230,496	30%
CPUC Energy Division Staff	\$69,925	\$853	1%
Total Expenses	\$6,922,453	\$2,342,661	34%
Subsidies and Benefits	\$202,685,986	\$111,320,300	55%
Total Program Costs and Discounts	\$209,608,439	\$113,662,961	54%

¹⁸ The CARE Program was later implemented by the Commission in D.89-07-062 and D.89-09-044.

¹⁹ 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.”

2.1.2. Provide the CARE Program enrollment rate to date.

CARE Enrollment		
Participants Enrolled	Eligible²⁰ Participants	Enrollment Rate
351,628	301,966	116%

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 4,032 completed CARE applications and 5,211 new enrollments for the program. Below is a summary of CARE-specific outreach efforts.

Direct Marketing

Direct Mail

In May 2023, SDG&E continued the monthly CARE bill comparison letters, sending over 800 direct mail letters to CARE-eligible customers without an email address on file.

Email

During this reporting month, SDG&E also continued the Bill Comparison emails, sending 40,718 emails to low-income customers garnering a 52% open rate and a 3.3% CTR.

²⁰ On April 13, 2023, pursuant to OP 189 of D.21-06-015, the investor-owned utilities (IOU) submitted a compliance filing regarding annual estimates of CARE and FERA eligible customers and related information. D.21-06-015 permanently extends the filing date for the annual estimates from December 31 to February 12 each year. On January 18, 2023, Pacific Gas and Electric Company requested an extension of time to comply with the requirement, on behalf of the IOUs, which was subsequently granted.

Organic Social

SDG&E utilized organic social media to promote CARE on SDG&E's Facebook, Instagram, Twitter and Nextdoor channels. Performance by social channel is included in the table below.

	Impressions	Engagements	Average Engagement Rate ²¹
Facebook	2,169	58	2.3%
Instagram	682	25	3.66%
Twitter	3,538	129	3.1%
Nextdoor	25,378	19	N/A

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

²¹ Engagement rate is the number of interactions (likes, comments, reactions) divided by followers and multiplied by 100. If there are multiple posts per channel in one month, an average is provided.

ongoing initiative to educate tribes on available customer assistance programs and determine eligibility for tribal members.

CARE Partners (Capitation Agencies)

SDG&E partners with 22 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. This month, the Chaldean Community Council in San Diego became the newest Capitation Partner. During May, the following numbers were generated by the Capitation Agencies:

Capitation Agencies²²	
ESA Leads	234
CARE Enrollments	120
CARE Recertification	44
FERA Enrollments	1
FERA Recertifications	0

²² CARE and FERA enrollment numbers include new enrollments and re-enrollments.

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 and are available to their constituents by appointment.

County Health and Human Service Agency Collaborative

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

HHSA	Number of:	YTD²³
ESA Leads	0	0
CARE Enrollments	33	244
CARE Recertifications	12	64
FERA Enrollments	0	3
FERA Recertifications	0	0

²³ 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

2025 Low Income Needs Assessment (LINA) Study

See Section 1.5.1.

Categorical Eligibility Study

See Section 1.5.1.

CHANGES Evaluation

A public webinar was held on May 16th to present the results of the study. Responses to comments received from stakeholders during and after the webinar will be provided in June along with the final report.

2.4.2. CARE Program Pilot

In June 2022, SDG&E launched the CARE post-enrollment verification (PEV) Outbound Call Pilot, which was aimed at contacting customers who have provided incorrect PEV documentation. The Pilot ran for eleven months, through April 30, 2023. SDG&E will be sharing its results and recommendations in an Advice Letter to be filed no later than July 31st.

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.²⁴ 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. In the Decision, the Commission authorized the FERA Program to be consolidated with the low income proceeding.²⁵ As such, all IOU FERA goals, budgets, and program design elements will be scoped into the IOUs low income budget applications moving forward. The Decision also approved FERA program management and subsidy budgets separate from CARE budgets.²⁶

²⁴ The FERA Program was later implemented by the Commission in D.04-02-057.

²⁵ OP of D.21-06-015 states, “The Family Electric Rate Assistance program proceeding will be consolidated with the California Alternate Rates for Energy and the Energy Savings program proceeding.”

²⁶ OP 34 of D.21-06-015 states, “Southern California Edison Company must file a Tier 1 advice letter within 30 days after the approval of this decision, separating out the approved Family Electric Rate Assistance (FERA) program management costs from the approved California Alternate Rates for Energy (CARE) program management costs and provide new and separate budget tables for CARE and FERA.”

3.1.1. Please provide FERA Program summary costs.

FERA Budget Categories	Authorized Budget	Actual Expenses to Date	% of Budget Spent
Outreach	\$364,691	\$54,914	15%
Proc., Certification and Re-	\$13,389	\$7,515	56%
Post Enrollment Verification	\$969	\$2,628	271%
Information Tech./Programming	\$53,045	\$2,630	5%
Studies	\$50,000	\$0	0%
Regulatory Compliance	\$45,920	\$18,644	41%
General Administration	\$73,891	\$10,729	15%
CPUC Energy Division Staff	\$10,488	\$171	2%
Total Expenses	\$612,393	\$97,231	16%
Subsidies and Benefits	\$4,170,665	\$1,919,764	46%
Total Program Costs and Discounts	\$4,783,058	\$2,016,995	42%

3.1.2. Provide the FERA Program enrollment rate to date.

FERA Enrollment		
Participants Enrolled	Eligible²⁷ Participants	Enrollment Rate
11,503	42,980	27%

²⁷ On April 13, 2023, pursuant to OP 189 of D.21-06-015, the investor-owned utilities (IOU) submitted a compliance filing regarding annual estimates of CARE and FERA eligible customers and related information. D.21-06-015 permanently extends the filing date for the annual estimates from December 31 to February 12 each year. On January 18, 2023, Pacific Gas and Electric Company requested an extension of time to comply with the requirement, on behalf of the IOUs, which was subsequently granted.

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 118 completed FERA applications and 196 new enrollments for the program. Below is a summary of FERA-specific outreach efforts.

Direct Marketing

Email

This month, SDG&E sent 7,287 FERA bill comparison emails which garnered a 54% open rate and a 3.5% CTR. Additionally, 22,940 generic emails, with no bill comparison, were sent to CCA customers garnering a 48% open rate and a 3.5% CTR.

Direct Mail

In May 2023, SDG&E sent over 450 bill comparison letters to non-CCA customers who did not have an email address on file.

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 FERA Pilots and Studies

3.4.1 FERA Program Studies

Categorical Eligibility Study

See Section 1.5.1.

3.4.2 FERA Program Pilot

SDG&E did not have any program pilots for this reporting period.

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) Building

Electrification, Clean Energy Homes, 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
(MF CAM)

ESA Program - Table 2B - Program Expenses & Energy Savings by Measures Installed
(MFWB)

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

ESA Program - Table 2D - Program Expenses & Energy Savings by Measures Installed
(Building Electrification)

ESA Program - Table 2E - Program Expenses & Energy Savings by Measures Installed
(Clean Energy Homes)

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

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

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

ESA Program - Table 5A, 5B, 5C, 5D, 5E, & 5F - 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
May 2023

ESA Program:	Authorized Budget			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Main Program (SF and MH)			\$ 17,652,716	\$ 522,154	\$ 774,436	\$ 1,296,590	\$ 3,272,804	\$ 2,988,387	\$ 6,261,191			35%
ESA Multifamily In-Unit			\$ 2,166,111	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
ESA Multifamily Common Area Measures			\$ 2,808,028	\$ 65,461	\$ 2,814	\$ 68,275	\$ 1,792,023	\$ 141,714	\$ 1,933,737			69%
ESA Multifamily Whole Building [1]			\$ 5,698,470	\$ 15,247	\$ 15,247	\$ 30,494	\$ 22,579	\$ 22,579	\$ 45,158			1%
ESA Pilot Plus and Pilot Deep			\$ 1,526,683	\$ 3,110	\$ 3,110	\$ 6,220	\$ 23,050	\$ 23,050	\$ 46,100			3%
Building Electrification Retrofit Pilot (SCE Only)			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Clean Energy Homes New Construction Pilot (SCE Only)			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
CSD Leveraging			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
SASH/MASH Unspent Funds [2]			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
ESA Program TOTAL	\$ -	\$ -	\$ 29,852,008	\$ 605,972	\$ 795,607	\$ 1,401,579	\$ 5,110,456	\$ 3,175,730	\$ 8,286,186			28%

1. The ESA Southern MFWB Program will be open for customer enrollment on July 1, 2023.

2. OP 12 of D.15-01-027 states "The Program Administrators shall ensure that program expenditures in each utility's service territory do not exceed the total authorized budget amounts over the duration of the programs. The program incentive budgets will be available until all funds are exhausted or until December 31, 2021, whichever occurs first. Any money unspent and unencumbered on January 1, 2022, shall be used for "cost-effective energy efficiency measures in low-income residential housing that benefit ratepayers," as set forth in Public Utilities Code Section 2852(c)(3)." The electric IOUs plan to file a Joint Advice Letter for disposal of unspent funds from the SASH and MASH programs to the ESA Program. Joint IOUs plan to file Advice Letter in Quarter 1 of 2023. After the Advice Letter is filed, budget authorization will be pending per Energy Division disposition of Advice Letter.

NOTE: Any required prior period corrections/adjustments are reported and reflected herein and supersede the results reported in prior months.

**Energy Savings Assistance Program Table 1 - Main (SF, MH, MF In-Unit) Expenses
San Diego Gas & Electric
May 2023**

ESA Program:	Authorized Budget [1]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency												
Appliances			\$ -	\$ 93,204	\$ -	\$ 93,204	\$ 431,208	\$ -	\$ 431,208			
Domestic Hot Water			\$ -	\$ 4,872	\$ 157,532	\$ 162,404	\$ 9,132	\$ 295,273	\$ 304,405			
Enclosure			\$ -	\$ 83,968	\$ 111,306	\$ 195,274	\$ 104,209	\$ 138,138	\$ 242,347			
HVAC			\$ -	\$ (91,671)	\$ 207,480	\$ 115,809	\$ 297,626	\$ 645,588	\$ 943,214			
Maintenance			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Lighting			\$ -	\$ 119,304	\$ -	\$ 119,304	\$ 374,871	\$ -	\$ 374,871			
Miscellaneous			\$ -	\$ 14,358	\$ -	\$ 14,358	\$ 146,369	\$ -	\$ 146,369			
Customer Enrollment			\$ -	\$ 83,010	\$ 83,010	\$ 166,020	\$ 891,549	\$ 891,549	\$ 1,783,098			
In Home Education			\$ -	\$ 23,383	\$ 23,383	\$ 46,766	\$ 115,332	\$ 115,332	\$ 230,664			
Pilot			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Implementer Compensation			\$ -	\$ 50,766	\$ 50,766	\$ 101,532	\$ 217,458	\$ 217,458	\$ 434,916			
Energy Efficiency TOTAL	\$ -	\$ -	\$ 12,324,066	\$ 381,194	\$ 633,477	\$ 1,014,671	\$ 2,587,754	\$ 2,303,338	\$ 4,891,092			40%
Funded Outside of ESA Program Budget												
Training Center	\$ -	\$ -	\$ 305,202	\$ 2,394	\$ 2,394	\$ 4,788	\$ 2,394	\$ 2,394	\$ 4,788			2%
Workforce Education and Training	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Inspections	\$ -	\$ -	\$ 100,722	\$ 6,574	\$ 6,574	\$ 13,148	\$ 36,988	\$ 36,988	\$ 73,976			73%
Marketing and Outreach	\$ -	\$ -	\$ 1,506,347	\$ 23,350	\$ 23,350	\$ 46,700	\$ 130,312	\$ 130,312	\$ 260,624			17%
Studies	\$ -	\$ -	\$ 125,000	\$ -	\$ -	\$ -	\$ 9,868	\$ 9,868	\$ 19,736			16%
Regulatory Compliance	\$ -	\$ -	\$ 300,652	\$ 17,988	\$ 17,988	\$ 35,976	\$ 63,797	\$ 63,797	\$ 127,594			42%
General Administration	\$ -	\$ -	\$ 2,610,272	\$ 86,199	\$ 86,198	\$ 172,397	\$ 432,297	\$ 432,296	\$ 864,593			33%
CPUC Energy Division	\$ -	\$ -	\$ 54,707	\$ 27	\$ 27	\$ 54	\$ 341	\$ 341	\$ 682			1%
SPOC	\$ -	\$ -	\$ 325,748	\$ 4,428	\$ 4,428	\$ 8,856	\$ 9,053	\$ 9,053	\$ 18,106			6%
Administration Subtotal	\$ -	\$ -	\$ 5,328,650	\$ 140,960	\$ 140,959	\$ 281,919	\$ 685,050	\$ 685,049	\$ 1,370,099			26%
TOTAL PROGRAM COSTS	\$ -	\$ -	\$ 17,652,716	\$ 522,154	\$ 774,436	\$ 1,296,590	\$ 3,272,804	\$ 2,988,387	\$ 6,261,191			35%
Funded Outside of ESA Program Budget												
Indirect Costs				\$ 45,410	\$ 46,585	\$ 91,995	\$ 213,880	\$ 201,844	\$ 415,724			
NGAT Costs		\$ 468,000	\$ 468,000		\$ 191,101	\$ 191,101		\$ 251,320	\$ 251,320		54%	54%

1. Authorized Budget per D.21-06-015, Attachment 1, Table 11

NOTE: Any required prior period corrections/adjustments are reported and reflected herein and supersede the results reported in prior months.

**Energy Savings Assistance Program Table 1A - MF In-Unit, MF CAM, and MFWB Expenses
San Diego Gas & Electric**

May 2023

ESA Program Multifamily Whole Building	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
ESA Multifamily In-Unit			\$ 2,166,111			\$ -	\$ -	\$ -	\$ -			
ESA Multifamily Common Area Measures [2]			\$ 2,808,028	\$ 65,461	\$ 2,814	\$ 68,275	\$ 1,792,023	\$ 141,714	\$ 1,933,737			69%
ESA Multifamily Whole Building			\$ 5,698,470	\$ 15,247	\$ 15,247	\$ 30,494	\$ 22,579	\$ 22,579	\$ 45,158			1%
			\$ -			\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ 10,672,609	\$ 80,708	\$ 18,061	\$ 98,769	\$ 1,814,602	\$ 164,293	\$ 1,978,895			19%

Expenditures for MF In-Unit by end use is shown on ESA Table 2.

Expenditures for MF Common Area Measures by end use is shown on ESA Table 2A.

Expenditures for MFWB by end use is shown on ESA Table 2B.

Energy Savings Assistance Program Table 1A-1 - Pilot Plus and Pilot Deep Expenses

ESA Pilot Plus and Pilot Deep Program	Authorized Budget [3]			Current Month Expenses			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	\$ 3,110	\$ 3,110	\$ 6,220	\$ 23,050	\$ 23,050	\$ 46,100			3%
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ 1,526,683	\$ 3,110	\$ 3,110	\$ 6,220	\$ 23,050	\$ 23,050	\$ 46,100			3%

Expenditures for Pilot Plus and Pilot Deep by end use is shown on ESA Table 2C.

Energy Savings Assistance Program Table 1A-2 - Building Electrification Expenses (SCE Only)

ESA Building Electrification Program	Authorized Budget			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Building Electrification Program			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			

Expenditures for Building Electrification by end use is shown on ESA Table 2D.

Energy Savings Assistance Program Table 1A-3 - Clean Energy Homes Expenses (SCE Only)

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

Expenditures for Clean Energy Homes by end use is shown on ESA Table 2E.

Energy Savings Assistance Program Table 1A-4 - Leveraging - CSD Expenses

ESA Program Leveraging - CSD	Authorized Budget			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Program Leveraging - CSD			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!	#DIV/0!	#DIV/0!

Expenditures for CSD Leveraging by end use is shown on ESA Table 2F.

1. Budget authorized in D.21-06-015, Attachment 1.

2. D.21-06-015 directs the IOUs to carry-forward all unspent and uncommitted ESA Common Area Measures funding as of June 30, 2021 into the remainder of program year 2021 and 2022.

The unspent funds remaining at the end of December 31, 2022 was \$2,808,028 to be used for 2023, during the transition to the MFWB Program.

3. Budget authorized in D.21-06-015, Attachment 2.

NOTE: Any required prior period corrections/adjustments are reported herein and supersede results reported in prior months and are reflected in the year-to-date expenses.

Energy Savings Assistance Main Program Table 2 (SF, MH, MF In-Unit)
San Diego Gas & Electric
May 2023

ESA Main Program (Summary) Total								
Measures	Plus	Units	Quantity Installed	Year-To-Date Completed & Expensed Installation				% of Expenditure
				kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$) [1]	
Appliances								
High Efficiency Clothes Washer	x	Each	-	-	-	-	-	0.0%
Refrigerator		Each	-	-	-	-	-	0.0%
New - Clothes Dryer		Each	-	-	-	-	-	0.0%
New - Dishwasher		Each	-	-	-	-	-	0.0%
Freezers		Each	-	-	-	-	-	0.0%
Domestic Hot Water								
Faucet Aerator		Each	-	-	-	-	-	0.0%
Other Domestic Hot Water		Home	391	1,407	0	1,418	31,150	2.1%
Water Heater Tank and Pipe Insulation		Home	1	-	-	(3)	166	0.0%
Water Heater Repair/Replacement		Home	49	-	-	309	124,688	8.3%
Low-Flow Showerhead / Combined Showerhead/TSV		Home	-	-	-	-	-	0.0%
Heat Pump Water Heater		Each	-	-	-	-	-	0.1%
Thermostatic Tub Spout/Diverter		Each	6	189	0	42	750	0.1%
Thermostatic Shower Valve		Each	-	-	-	-	-	0.0%
New - Solar Water Heating		Each	-	-	-	-	-	0.0%
Enclosure								
Air Sealing		Home	508	15,496	3	529	235,175	15.7%
Caulking		Home	-	-	-	-	-	0.0%
New - Diagnostic Air Sealing		Home	-	-	-	-	-	0.0%
Attic Insulation		Home	4	215	0	140	5,648	0.4%
New - Floor Insulation		Home	-	-	-	-	-	0.0%
HVAC								
Removed - FAU Standing Pilot Conversion		Each	0	-	-	-	-	0.0%
Furnace Repair/Replacement		Each	147	-	-	(1,303)	471,783	31.6%
Room A/C Replacement		Each	-	-	-	-	-	0.0%
Central A/C replacement		Each	-	-	-	-	-	0.0%
Heat Pump Replacement		Each	-	-	-	-	-	0.0%
Evaporative Cooler (Replacement)		Each	-	-	-	-	-	0.0%
Evaporative Cooler (Installation)		Each	-	-	-	-	-	0.0%
Duct Test and Seal		Home	-	-	-	-	-	0.0%
Energy Efficient Fan Control		Home	-	-	-	-	-	0.0%
New - Prescriptive Duct Sealing		Home	-	-	-	-	-	0.0%
High Efficiency Forced Air Unit (HE FAU)		Home	-	-	-	-	-	0.0%
Removed - A/C Time Delay		Home	-	-	-	-	-	0.0%
Smart Thermostat		Home	30	847	-	121	7,825	0.5%
New - Portable A/C		Each	-	-	-	-	-	0.0%
New - Central Heat Pump-FS (propane or gas space)		Each	-	-	-	-	-	0.0%
New - Wholehouse Fan		Each	-	-	-	-	-	0.0%
Maintenance								
Furnace Clean and Tune		Home	-	-	-	-	-	0.0%
Central A/C Tune up		Home	-	-	-	-	-	0.0%
New - Evaporative Cooler Maintenance		Home	-	-	-	-	-	0.0%
Lighting								
Removed - Interior Hard wired LED fixtures		Each	-	-	-	-	-	0.0%
Exterior Hard wired LED fixtures		Each	-	-	-	-	-	0.0%
Removed - LED Torchiers		Each	-	-	-	-	-	0.0%
Removed - Occupancy Sensor		Each	-	-	-	-	-	0.0%
Removed - LED Night Light		Each	-	-	-	-	-	0.0%
LED Reflector Bulbs		Each	-	-	-	-	-	0.0%
New - LED R/BR Lamps		Each	582	1,758	0	(30)	10,098	0.7%
LED A/Lamps		Each	5,079	10,767	1	(191)	60,034	4.0%
Miscellaneous								
Pool Pumps		Each	-	-	-	-	-	0.0%
Power Strip		Each	163	15,780	2	-	9,694	0.6%
Power Strip Tier II		Each	341	64,129	1	(0)	28,514	1.9%
NEW - Air Purifier		Home	-	-	-	-	-	0.0%
Cold Storage		Each	-	-	-	-	-	0.0%
New - Comprehensive Home Health and Safety Check-up		Home	-	-	-	-	-	0.0%
New - CO and Smoke Alarm		Each	-	-	-	-	-	0.0%
Pilots								
								0.0%
Customer Enrollment								
ESA Outreach & Assessment		Home	1,297	-	-	-	\$ 509,055	34.1%
ESA In-Home Energy Education		Home	-	-	-	-	\$ -	0.0%
Total Savings/Expenditures			8,598	110,568	8	1,032	\$ 1,494,580	
Total Households Weatherized								
Households Treated		Total						
- Single Family Households Treated		Home	631					
- Multi-family Households Treated (In-unit)		Home	427					
- Mobile Homes Treated		Home	-					
Total Number of Households Treated		Home	1,058					
# Eligible Households to be Treated for PY		Home	11,711					
% of Households Treated		%	9%					
- Master-Meter Households Treated		Home	2					

ESA Program - Main	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ 685,050	\$ 685,049	\$ 1,370,099
Direct Implementation (Non-Incentive)	\$ 217,458	\$ 217,458	\$ 434,916
Direct Implementation	\$ 2,370,296	\$ 2,085,880	\$ 4,456,176
TOTAL ESA Main COSTS	\$ 3,272,804	\$ 2,988,387	\$ 6,261,191

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.
1. The total expenditures presented in this table exclude \$2,911,493 in accruals and accrual reversals.

NOTE: Any required prior period corrections/adjustments are reported and reflected herein and supersedes the results reported in prior months.

Energy Savings Assistance Common Area Measures Program Table 2A
San Diego Gas & Electric
May 2023

		ESA Program - Multifamily Common Area Measures [5]						
		Year-To-Date Completed & Expensed Installation						
	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
ESA CAM Measures [1]								
Appliances								
Domestic Hot Water								
Central Boiler**	Cap-kBTUh	655		-	-	2,397	\$ 131,983	36%
Faucet Aerator	Each	2		-	-	12	\$ 20	0.0%
Pipe Insulation	Home							0.0%
Envelope								
								0.0%
								0.0%
HVAC								
AC Tune-up**	Cap-Tons							0.0%
Furnace Replacement**	Cap-kBTUh							0.0%
HEAT Pump Split System**	Cap-Tons							0.0%
HEAT Pump Split System	Each	15		533	0	-	\$ 108,191	29.5%
Programmable Thermostat	Each	4		3	-	1	\$ 1,453	0.4%
Lighting								
Exterior LED Lighting	Fixture	192		15,642	0	(30)	45,765	12.5%
Exterior LED Lighting - Pool	Lamp							0.0%
Interior LED Exit Sign	Fixture	5		49	0	(0)	\$ 817	0.2%
Interior LED Fixture	Fixture	386		72,954	18	(212)	\$ 68,090	18.6%
Interior LED Lighting	KiloLumen	5		66	0	(1)	\$ 722	0.2%
Interior LED Screw-in	Lamp	6		249	0	(1)	\$ 89	0.0%
Interior TLED Type A Lamps	Lamp	20		134	0	(2)	\$ 390	0.1%
Interior TLED Type C Lamps	Lamp	227		4,086	0	(52)	\$ 9,484	2.6%
Miscellaneous								
Tier-2 Smart Power Strip	Each	-	-	-	-	-	\$ -	0.0%
Variable Speed Pool Pump	Each	-	-	-	-	-	\$ -	0.0%
Ancillary Services								
Audit [4]		11	-	-	-	-	\$ 12,091	3.3%
Total	-	1,517	-	93,716	19	2,114	\$ 367,004	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated [2]	5
Subtotal of Master-metered Multifamily Properties Treated	4
Total Number of Multifamily Tenant Units w/in Properties Treated [3]	0
Total Number of buildings w/in Properties Treated	13

ESA Program - Multifamily Common Area	Year to Date Expenses			
	Electric	Gas	Total	
Administration	\$ 38,001	\$ 38,001	\$ 76,002	
Direct Implementation (Non-Incentive)	\$ 31,960	\$ 31,960	\$ 63,920	
Direct Implementation	\$ 1,722,062	\$ 71,753	\$ 1,793,815	<<Includes measures costs
TOTAL MF CAM COSTS	\$ 1,792,023	\$ 141,714	\$ 1,933,737	

[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:

Savings estimates are sourced from the PY2015 to 2017 ESA Impact Evaluation; Energy Division instructed the IOUs to use these results for 2019 and 2020 savings estimates.

[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.

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

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

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

NOTE: Any required prior period corrections/adjustments are reported and reflected herein and supersede the results reported in prior months.

Energy Savings Assistance Program - Multifamily Whole Building (MF CAM, MF In-Unit, WFWB) Table 2B
San Diego Gas & Electric
May 2023

ESA Program - MFWB [5]								
Year-To-Date Completed & Expensed Installation								
	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTU/h and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
ESA MFWB Measures [1]								
Appliances								
Domestic Hot Water								
Central Boiler**	Cap-kBTU/h	-	-	-	-	-	\$ -	-
Faucet Aerator	Each	-	-	-	-	-	\$ -	-
Pipe Insulation	Home	-	-	-	-	-	\$ -	-
Envelope								
HVAC								
AC Tune-up**	Cap-Tons	-	-	-	-	-	\$ -	-
Furnace Replacement**	Cap-kBTU/h	-	-	-	-	-	\$ -	-
HEAT Pump Split System**	Cap-Tons	-	-	-	-	-	\$ -	-
HEAT Pump Split System	Each	-	-	-	-	-	\$ -	-
Programmable Thermostat	Each	-	-	-	-	-	\$ -	-
Lighting								
Exterior LED Lighting	Fixture	-	-	-	-	-	\$ -	-
Exterior LED Lighting - Pool	Lamp	-	-	-	-	-	\$ -	-
Interior LED Exit Sign	Fixture	-	-	-	-	-	\$ -	-
Interior LED Fixture	Fixture	-	-	-	-	-	\$ -	-
Interior LED Lighting	KiloLumen	-	-	-	-	-	\$ -	-
Interior LED Screw-in	Lamp	-	-	-	-	-	\$ -	-
Interior TLED Type A Lamps	Lamp	-	-	-	-	-	\$ -	-
Interior TLED Type C Lamps	Lamp	-	-	-	-	-	\$ -	-
Miscellaneous								
Tier-2 Smart Power Strip	Each	-	-	-	-	-	\$ -	-
Variable Speed Pool Pump	Each	-	-	-	-	-	\$ -	-
Ancillary Services								
Audit [4]		-	-	-	-	-	\$ -	-
Total	-	-	-	-	-	-	\$ -	-

Multifamily Properties Treated (Common Area Measures and Whole Building)	Number
Total Number of Multifamily Properties Treated [2]	0
Subtotal of Master-metered Multifamily Properties Treated	0
Total Number of buildings w/in Properties Treated	0
Total Number of Multifamily Tenant Units w/in Properties Treated [3]	0

Multifamily Households Treated (In-Unit)	Number
Total Number of households individually treated (In-unit)	0

ESA Program - MFWB	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ 22,579	\$ 22,579	\$ 45,158
Direct Implementation (Non-Incentive)	\$ -	\$ -	\$ -
Direct Implementation	\$ -	\$ -	\$ -
TOTAL MFWB COSTS	\$ 22,579	\$ 22,579	\$ 45,158

<<Includes measures costs

MFWB Implementation to occur no earlier than January 2023.

[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:

Savings estimates are sourced from the PY2015 to 2017 ESA Impact Evaluation; Energy Division instructed the IOUs to use these results for 2019 and 2020 savings estimates.

[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.

* Note: Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are income eligible based on CPUC income requirements of at or below 200% of the Federal Poverty Guidelines.

** 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.

NOTE: Any required prior period corrections/adjustments are reported and reflected herein and supersede the results reported in prior months.

Energy Savings Assistance Program Table 2C Pilot Plus and Pilot Deep
San Diego Gas & Electric
May 2023

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								Enclosure								
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%	
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%	
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%	
HVAC								HVAC								
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%	
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%	
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%	
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%	
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%	
Maintenance								Maintenance								
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%	
	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%	
Lighting								Lighting								
	Each					\$ -	0.0%		Each					\$ -	0.0%	
	Each					\$ -	0.0%		Each					\$ -	0.0%	
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%	
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%	
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%	
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%	
Miscellaneous								Miscellaneous								
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%	
	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%	
Customer Enrollment								Customer Enrollment								
ESA Outreach & Assessment	Home	-				\$ -	0.0%		ESA Outreach & Assessment	Home	-			\$ -	0.0%	
ESA In-Home Energy Education	Home	-				\$ -	0.0%		ESA In-Home Energy Education	Home	-			\$ -	0.0%	
Total Savings/Expenditures			-	-	-	\$ -	0.0%		Total Savings/Expenditures			-	-	-	\$ -	0.0%
Households Treated		Total							Households Treated		Total					
- Single Family Households Treated	Home								- Single Family Households Treated	Home						
- Mobile Homes Treated	Home								- Mobile Homes Treated	Home						
Total Number of Households Treated	Home								Total Number of Households Treated	Home						

ESA Program - Pilot Plus and Pilot Deep	Year to Date Expenses			
	Electric	Gas	Total	
Administration	\$ 23,050	\$ 23,050	\$ 46,100	
Direct Implementation (Non-Incentive)			\$ -	
Direct Implementation			\$ -	<<Includes measures costs
TOTAL Pilot Plus and Pilot Deep COSTS	\$ 23,050	\$ 23,050	\$ 46,100	

Note: IOUs - If there are new measures that are approved through the ESA Working Group, mark in column A as such to indicate that it is a new measure.

NOTE: Any required prior period corrections/adjustments are reported and reflected herein and supersede the results reported in prior months.

Energy Savings Assistance Program Table 2D
ESAP Expenses and Energy Savings by Measures Installed - Building Electrification (SCE only)
San Diego Gas & Electric
May 2023

Measures	Units	ESA Program - Building Electrification Retrofit Pilot [1]					
		Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances							
Electric Dryer	Each	-	-	-	-	\$ -	0.0%
Heat Pump Dryer	Each	-	-	-	-	\$ -	0.0%
Induction Cooktop	Each	-	-	-	-	\$ -	0.0%
Induction Range	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water							
Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%
Enclosure							
Attic Insulation	Home	-	-	-	-	\$ -	0.0%
HVAC							
Heat Pump HVAC	Each	-	-	-	-	\$ -	0.0%
Duct Seal	Each	-	-	-	-	\$ -	0.0%
Smart Thermostat	Each	-	-	-	-	\$ -	0.0%
Miscellaneous [2]							
Minor Home Repair	Home	-				\$ -	0.0%
Carbon Monoxide/Smoke Alarm	Each	-				\$ -	0.0%
Electric Panel	Each	-				\$ -	0.0%
Electric Sub-Panel	Each	-				\$ -	0.0%
Electrical Circuit Run	Each	-				\$ -	0.0%
Induction Cookware	Home	-				\$ -	0.0%
Customer Enrollment							
Energy Assessment	Home	-				\$ -	0.0%
Total Savings/Expenditures			-	-	-	\$ -	0.0%
Households Treated	Total						
Single Family Households Treated	Home						
Estimated Avg. Annual Bill Savings Treated [3]	Home						

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

[1] The costs for the following measures are included in the overall expenditures of the BE Pilot: additional line set for ductless mini-splits and building permits.

[2] These measures do not have any savings associated and may be required to complete the installation to electrify the residential end-uses of participating households.

[3] Estimated average annual bill savings will be calculated prior to participation and must not increase total energy costs.

Energy Savings Assistance Program Table 2E
ESAP Expenses and Energy Savings by Measures Installed - Clean Energy Homes (SCE only)
San Diego Gas & Electric
May 2023

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

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

<<Includes measures costs

**Energy Savings Assistance Program Table 2F
San Diego Gas & Electric
May 2023**

Measures	Plus	Units	ESA Program - CSD Leveraging					
			Quantity Installed	Year-To-Date Completed & Expensed Installation				% of Expenditure
				kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	
Appliances								
High Efficiency Clothes Washer		Each						
Refrigerator		Each						
New - Clothes Dryer		Each						
New - Dishwasher		Each						
Freezers		Each						
Domestic Hot Water								
Faucet Aerator		Each						
Other Domestic Hot Water		Home						
Water Heater Tank and Pipe Insulation		Home						
Water Heater Repair/Replacement		Home						
Low-Flow Showerhead / Combined Showerhead/TSV		Home						
Heat Pump Water Heater		Each						
Thermostatic Tub Spout/Diverter		Each						
Thermostatic Shower Valve		Each						
New - Solar Water Heating								
Enclosure								
Air Sealing		Home						
Caulking		Home						
New - Diagnostic Air Sealing		Home						
Attic Insulation		Home						
New - Floor Insulation		Home						
HVAC								
Removed - FAU Standing Pilot Conversion		Each						
Furnace Repair/Replacement		Each						
Room A/C Replacement		Each						
Central A/C replacement		Each						
Heat Pump Replacement		Each						
Evaporative Cooler (Replacement)		Each						
Evaporative Cooler (Installation)		Each						
Duct Test and Seal		Home						
Energy Efficient Fan Control		Home						
New - Prescriptive Duct Sealing		Home						
High Efficiency Forced Air Unit (HE FAU)		Home						
Removed - A/C Time Delay		Home						
Smart Thermostat		Home						
New - Portable A/C		Each						
New - Central Heat Pump-FS (propane or gas space)								
New - Wholehouse Fan								
Maintenance								
Furnace Clean and Tune		Home						
Central A/C Tune up		Home						
New - Evaporative Cooler Maintenance		Home						
Lighting								
Removed - Interior Hard wired LED fixtures		Each						
Exterior Hard wired LED fixtures		Each						
Removed - LED Torchiere		Each						
Removed - Occupancy Sensor		Each						
Removed - LED Night Light		Each						
LED Reflector Bulbs		Each						
LED A-Lamps		Each						
Miscellaneous								
Pool Pumps		Each						
Power Strip		Each						
Power Strip Tier II		Each						
NEW - Air Purifier		Home						
Cold Storage		Each						
New - Comprehensive Home Health and Safety Check-up		Home						
New - CO and Smoke Alarm		Each						
Pilots								
Customer Enrollment								
ESA Outreach & Assessment		Home						
ESA In-Home Energy Education		Home						
Total Savings/Expenditures								
Total Households Weatherized								
CSD MF Tenant Units Treated			Total					

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

←Includes measures costs

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 '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.

NOTE: Any required prior period corrections/adjustments are reported and reflected herein and supersede the results reported in prior months.

**Energy Savings Assistance Program Tables 3A-H - Energy Savings and Average Bill Savings per Treated
Home/Common Area
San Diego Gas & Electric
May 2023**

Table 3A, ESA Program (SF, MH, MF In-Unit)		
Annual kWh Savings		110,588
Annual Therm Savings		1,032
Lifecycle kWh Savings		431,798
Lifecycle Therm Savings		(7,961)
Current kWh Rate	\$	0.25
Current Therm Rate	\$	1.69
Average 1st Year Bill Savings / Treated Households	\$	22.95
Average Lifecycle Bill Savings / Treated Households	\$	73.95

Table 3B, ESA Program - Multifamily Common Area		
Annual kWh Savings		93,716
Annual Therm Savings		2,114
Lifecycle kWh Savings		520,741
Lifecycle Therm Savings		34,206
Current kWh Rate	\$	0.25
Current Therm Rate	\$	1.69
Average 1st Year Bill Savings / Treated Property	\$	5,463.80
Average Lifecycle Bill Savings / Treated Property	\$	37,960.16

Table 3C, ESA Program –Multifamily Whole Building (MF In-Unit, MF CAM, MFWB)		
Annual kWh Savings		-
Annual Therm Savings		-
Lifecycle kWh Savings		-
Lifecycle Therm Savings		-
Current kWh Rate	\$	-
Current Therm Rate	\$	-
Average 1st Year Bill Savings / Treated Property	\$	-
Average Lifecycle Bill Savings / Treated Property	\$	-

Table 3D, ESA Program - Pilot Plus		
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 Households	\$	-

Table 3E, ESA Program - Pilot Deep		
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 Households	\$	-

Table 3F, ESA Program - Building Electrification		
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 Households	\$	-

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

Table 3H, Summary - ESA Program (SF, MH, MF In-Unit), MF CAM, MFWB, Pilot Plus Pilot Deep, BE, CSD[1]		
Annual kWh Savings		204,304
Annual Therm Savings		3,146
Lifecycle kWh Savings		952,539
Lifecycle Therm Savings		26,246
Current kWh Rate	\$	0.51
Current Therm Rate	\$	3.38
Average 1st Year Bill Savings / Treated Households/Properties	\$	5,486.74
Average Lifecycle Bill Savings / Treated Households/Properties	\$	38,034.11

[1] Summary is the sum of ESA Main, MF CAM, MFWB, Pilot Plus Pilot Deep, BE, CSD Leveraging.
Note: The ESA Southern MFWB Program will be Open for Customer enrollment on July 1, 2023.

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 4 - Homes/Buildings Treated
San Diego Gas & Electric
May 2023**

Table 4A, ESA Program (SF, MH, MF In-Unit)						
	Eligible Households			Households Treated YTD		
County	Rural [1]	Urban	Total	Rural	Urban	Total
Orange	0	21,308	21,308	0	0	0
San Diego	8,986	355,023	364,009	16	1,042	1,058
Total	8,986	376,331	385,317	16	1,042	1,058

Table 4B, ESA Program - Multifamily Common Area						
	Eligible Properties [2]			Properties Treated YTD		
County				Rural	Urban	Total
				0	0	0
				0	5	5
Total				0	5	5

Table 4C, ESA Program - Multifamily Whole Building (MF CAM, MF In-Unit, MFWB)						
	Eligible Properties [2]			Properties Treated YTD		
County				-	-	Total
Orange	-	-	-	-	-	-
San Diego	-	-	-	-	0	0
Total					0	0

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

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

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

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

Note: The ESA Southern MFWB Program will be Open for Customer enrollment on July 1, 2023.

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 5 - Energy Savings Assistance Program Customer Summary
San Diego Gas & Electric
May 2023

Table 5A, ESA Program (SF, MH, MF In-Unit)												
Gas & Electric				Gas Only				Electric Only				Total
Month	# 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	-	-	-	-	-	-	-	-	-	-	-	-
February	-	12	-	-	-	-	-	-	-	-	12	-
March	-	(274)	806	0	-	-	-	-	-	352	0	(274)
April	1,001	93	87,888	4	-	-	-	49	-	5,192	0	93
May	8	1,201	15,290	3	-	-	-	2	-	1,291	0	8
June	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-
August	-	-	-	-	-	-	-	-	-	-	-	-
September	-	-	-	-	-	-	-	-	-	-	-	-
October	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-
YTD	1,007	1,832	183,784	7	-	-	-	81	-	6,885	0	1,007

Table 5B, ESA Program - MF CAM												
Gas & Electric				Gas Only				Electric Only				Total
Month	# 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	3	2,236	52,202	10	-	-	-	-	-	3	2,236	52,202
March	1	14	3,783	1	-	-	-	-	-	1	60	3,783
April	1	(118)	37,731	8	-	-	-	-	-	1	(118)	37,731
May	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-
August	-	-	-	-	-	-	-	-	-	-	-	-
September	-	-	-	-	-	-	-	-	-	-	-	-
October	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-
YTD	5	2,114	93,716	19	-	-	-	-	-	5	2,114	93,716

Table 5C, ESA Program - Multifamily Whole Building (MF CAM, MF In-Unit, MFWB)												
Gas & Electric				Gas Only				Electric Only				Total
Month	# 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	-	-	-	-	-	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-	-	-	-	-	-
April	-	-	-	-	-	-	-	-	-	-	-	-
May	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-
August	-	-	-	-	-	-	-	-	-	-	-	-
September	-	-	-	-	-	-	-	-	-	-	-	-
October	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-
YTD	-	-	-	-	-	-	-	-	-	-	-	0

Note: The ESA Southern MFWB Program will be Open for Customer enrollment on July 1, 2023.

Table 5D, ESA Program - Pilot Plus and Pilot Deep												
Gas & Electric				Gas Only				Electric Only				Total
Month	# 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	-	-	-	-	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-	-	-	-	-	-
April	-	-	-	-	-	-	-	-	-	-	-	-
May	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-
August	-	-	-	-	-	-	-	-	-	-	-	-
September	-	-	-	-	-	-	-	-	-	-	-	-
October	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-
YTD	-	-	-	-	-	-	-	-	-	-	-	0

Table 5E, ESA Program - Building Electrification												
Gas & Electric				Gas Only				Electric Only				Total
Month	# 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	-	-	-	-	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-	-	-	-	-	-
April	-	-	-	-	-	-	-	-	-	-	-	-
May	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-
August	-	-	-	-	-	-	-	-	-	-	-	-
September	-	-	-	-	-	-	-	-	-	-	-	-
October	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-
YTD	-	-	-	-	-	-	-	-	-	-	-	0

Table 5F, ESA Program - CSD Leveraging												
Gas & Electric				Gas Only				Electric Only				Total
Month	# 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	-	-	-	-	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-	-	-	-	-	-
April	-	-	-	-	-	-	-	-	-	-	-	-
May	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-
August	-	-	-	-	-	-	-	-	-	-	-	-
September	-	-	-	-	-	-	-	-	-	-	-	-
October	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-
YTD	-	-	-	-	-	-	-	-	-	-	-	0

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
May 2023

	Authorized 2021-26 Funding			Current Month Expenses			Year to Date Expenses			Cycle to Date Expenses			% of Budget Expended		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots															
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				0%	0%	0%
Total Pilots	\$ -	\$ -	\$ -			\$ -			\$ -				0%	0%	0%
Studies															
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study [1]	\$ -	\$ -	\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 18,725	\$ 18,725	\$ 37,450			100%
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study [2]	\$ -	\$ -	\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study [2]	\$ -	\$ -	\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Joint IOU - Statewide CARE-ESA Categorical Study [2][3]	\$ -	\$ -	\$ 11,250	\$ -	\$ -	\$ -	\$ 9,868	\$ 9,868	\$ 19,736	\$ 17,804	\$ 17,804	\$ 35,608			317%
Load Impact Evaluation Study [2]	\$ -	\$ -	\$ 225,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Equity Criteria and Non Energy Benefits Evaluation (NEB's) [2]	\$ -	\$ -	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Evolving Study and Data Needs [2]	\$ -	\$ -	\$ 300,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 37,919	\$ 37,919	\$ 75,838			25%
Joint IOU - Process Evaluation Studies (1-4 Studies) [2]			\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Total Studies	\$ -	\$ -	\$ 798,750	\$ -	\$ -	\$ -	\$ 9,868	\$ 9,868	\$ 19,736	\$ 74,448	\$ 74,448	\$ 148,896			2%

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

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

3. SDG&E is the lead IOU for the Statewide Categorical Eligibility Study. The overage is due to SDG&E funding the study at 100% in advance of IOU reimbursements. The other participating IOU's will be reimbursing SDG&E in 2023 for their portion of the expenses.

NOTE: Any required prior period corrections/adjustments are reported and reflected herein and supersede the results reported in prior months.

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

**San Diego Gas & Electric
May 2023**

ESA Main (SF, MH, MF in-unit)											
Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Energy Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households
Demographic											
Housing Type											
SF	170,522	631	0%	2,152	29%	81	88	0	(1)	2	958
MH	22,468	-	0%	68	0%	-	-	-	-	-	-
MF In-Unit	179,480	427	0%	1,628	26%	47	47	0	1	1	538
Rent vs. Own											
Own	136,885	355	0%	12,244	3%	71	89	0	0	2	1,480
Rent	236,613	703	0%	24,569	3%	62	62	0	1	1	483
Previous vs. New Participant											
Previous	N/A	712	0%	28987	2%	55	61	0	1	1	901
New Participant	13,760	346	3%	35464	1%	94	98	0	1	1	847
Seniors	166,246	266	0%	X	0%	59	67	0	2	1	1,084
Veterans	44,771	22	0%	X	0%	72	72	0	1	1	620
Hard-to-Reach	N/A	822	0%	X	0%	65	66	0	1	1	643
Vulnerable	160,975	290	0%	13,365	2%	49	53	0	1	1	815
Location											
DAC	90,092	557	1%	24,983	2%	63	68	0	1	1	867
Rural	8,611	16	0%	1,410	1%	87	91	0	(1)	1	792
Tribal	21,716	4	0%	804	0%	154	154	0	(0)	(0)	505
PSPS Zone	131,968	2	0%	880	0%	132	132	0	(0)	(0)	475
Wildfire Zone	63,552	46	0%	6,129	1%	91	94	0	2	1	675
Climate Zone 6	16,775	-	0%	2,078	0%	-	-	-	-	-	-
Climate Zone 7	244,028	763	0%	44,353	2%	67	72	0	0	1	900
Climate Zone 8	4,649	-	0%	568	0%	-	-	-	-	-	-
Climate Zone 10	99,636	295	0%	19,240	2%	63	69	0	2	2	847
Climate Zone 14	3,490	-	0%	339	0%	-	-	-	-	-	-
Climate Zone 15	1,084	-	0%	48	0%	-	-	-	-	-	-
CARB Communities	293,478	148	0%	5,323	3%	65	71	0	1	1	875
Financial											
CARE	289,316	1,011	0%	63,535	2%	67	71	0	0	1	823
FERA	43,709	13	0%	1,815	1%	111	117	0	(1)	0	791
Disconnected	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A
Arrearages	144,053	371	0%	19,782	2%	78	79	0	0	1	611
High Usage	52,414	29	0%	1,064	3%	75	80	0	(1)	1	936
High Energy Burden	132,033	198	0%	7,560	3%	48	51	0	(0)	1	743
SEVI											
Low	275,414	151	0%	16,399	1%	69	76	0	0	2	945
Medium	318,131	290	0%	24,243	1%	72	80	0	0	1	957
High	243,149	617	0%	25,182	2%	61	66	0	1	1	832
Affordability Ratio	35,421	110	0%	5,113	2%	50	51	0	(0)	1	680
Health Condition											
Medical Baseline	20,925	88	0%	3,725	2%	92	101	0	1	2	936
Respiratory											
Low	283,333	339	0%	29,567	1%	68	75	0	0	1	871
Medium	195,497	405	0%	21,228	2%	61	66	0	1	1	883
High	113,025	314	0%	15,029	2%	68	75	0	0	1	908
Disabled	115,907	75	0%	X	0%	68	79	0	1	1	943

Note: The MF In-unit will be tracked with ESA main program until MFWB program launches. Upon MFWB program launch, the data for MF In-Unit and MF CAM will be captured in the MFWB section in the following two tables below.

Pilot Plus and Pilot Deep										
Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households	Avg. Energy Savings (kW) Per Treated Households		Avg. Energy Savings (Therms) Per Treated Households	Avg. Cost Per Treated Households
Demographic										
Housing Type										
SF			0%		0%					
MH			0%		0%					
MF In-Unit			0%		0%					
Rent vs. Own										
Own			0%		0%					
Rent			0%		0%					
Previous vs. New Participant										
Previous			0%		0%					
New Participant			0%		0%					
Seniors			0%		0%					
Veterans			0%		0%					
Hard-to-Reach			0%		0%					
Vulnerable			0%		0%					
Location										
DAC			0%		0%					
Rural			0%		0%					
Tribal			0%		0%					
PSPS Zone			0%		0%					
Wildfire Zone			0%		0%					
Climate Zone 6			0%		0%					
Climate Zone 7			0%		0%					
Climate Zone 8			0%		0%					
Climate Zone 10			0%		0%					
Climate Zone 14			0%		0%					
Climate Zone 15			0%		0%					
CARB Communities			0%		0%					
Financial										
CARE			0%		0%					
FERA			0%		0%					
Disconnected			0%		0%					
Arrearages			0%		0%					
High Usage			0%		0%					
High Energy Burden			0%		0%					
SEVI										
Low			0%		0%					
Medium			0%		0%					
High			0%		0%					
Affordability Ratio			0%		0%					
Health Condition										
Medical Baseline			0%		0%					
Respiratory										
Low			0%		0%					
Medium			0%		0%					
High			0%		0%					
Disabled			0%		0%					

Building Electrification (SCE Only)									
Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households	Avg. Energy Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households	Avg. Cost Per Treated Households
Demographic									
Housing Type									
SF			0%		0%				
MH			0%		0%				
MF In-Unit			0%		0%				
Rent vs. Own									
Own			0%		0%				
Rent			0%		0%				
Previous vs. New Participant									
Previous			0%		0%				
New Participant			0%		0%				
Seniors			0%		0%				
Veterans			0%		0%				
Hard-to-Reach			0%		0%				
Vulnerable			0%		0%				
Location									
DAC			0%		0%				
Rural			0%		0%				
Tribal			0%		0%				
PSPS Zone			0%		0%				
Wildfire Zone			0%		0%				
Climate Zone 6			0%		0%				
Climate Zone 7			0%		0%				
Climate Zone 8			0%		0%				
Climate Zone 10			0%		0%				
Climate Zone 14			0%		0%				
Climate Zone 15			0%		0%				
CARB Communities			0%		0%				
Financial									
CARE			0%		0%				
FERA			0%		0%				
Disconnected			0%		0%				
Arrearages			0%		0%				
High Usage			0%		0%				
High Energy Burden			0%		0%				
SEVI									
Low			0%		0%				
Medium			0%		0%				
High			0%		0%				
Affordability Ratio			0%		0%				
Health Condition									
Medical Baseline			0%		0%				
Respiratory									
Low			0%		0%				
Medium			0%		0%				
High			0%		0%				
Disabled			0%		0%				

NOTE: Any required prior period corrections/adjustments are reported and reflected herein and supersede the results reported in prior months.

Energy Savings Assistance Program Table - 8 Clean Energy Referral, Leveraging, and Coordination
San Diego Gas & Electric
April 2023

Partner	Brief Description of Effort	# of Referral	# of Leveraging	# of Coordination Efforts	# of Leads	# of Enrollments
LIHEAP	LIHEAP agencies in SDG&E service territory leverage LIHEAP payment leads to provide ESA Program services to customers.	0	0	0	0	0
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.	0	0	0	0	0
SDCWA	SDG&E provide SDCWA with a list of homes within their service territory that have received water and energy efficient measures.	0	0	0	N/A	N/A
CARE/Medical Baseline	CARE Online Enrollments are leveraged for ESA Program Enrollments.	N/A	N/A	N/A		
CARE High Usage	Leads generated through CARE HEU income verifications completed	N/A	N/A	N/A		
Energy Solutions Partner Network	SDG&E works closely with a network of approximately 200 community-based organizations (CBOs) to connect customers with Customer Assistance programs.	N/A*	30	195	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*	1	29	234	0

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.

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 - 9 Tribal Outreach

San Diego Gas & Electric May 2023

OUTREACH STATUS	Quantity (Includes CARE, FERA, and ESA)***	List of Participating Tribes
Tribes completed ESA Meet & Confer*	13	Barona Band of Mission Indians, Jamul Indian Village of California of the Kumeyaay Indians, Pauma Band of Luiseno Indians, Rincon Band of Luiseno Indians, Ewiiapaayap Band of Kumeyaay Indians, Sycuan Band of Kumeyaay Nation, Viejas Band of the Kumeyaay Nation, La Posta Band of Diegueno Mission Indians, Mesa Grande Band of Diegueno Mission Indians, Manzanita Band of Kumeyaay Nation, Campo Kumeyaay Nation, Iipay Nation of Santa Ysabel, La Jolla Band of Luiseno Indians
Tribes requested outreach materials or applications	5	Pauma Band of Luiseno Indians, La Posta Band of Diegueno Mission Indians, Mesa Grande Band of Diegueno Mission Indians, Iipay Nation Santa Ysabel, Jamul Indian Village of California of the Kumeyaay Nation
Tribes who have not accepted offer to Meet and Confer	4	San Pasqual Band of Mission Indians, Inaja-Cosmit Band of Indians****, Pala Band of Luiseno Indians, Los Coyotes Band of Cahuilla and Cupeno Indian
Non-Federally Recognized Tribes who participated in Meet & Confer	0	
Tribes and Housing Authority sites involved in Focused Project/ESA	N/A	N/A
Partnership offer on Tribal Lands	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

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

*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
May 2023

CARE Program:	Authorized Budget [1]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Outreach	\$ 2,964,569	\$ 329,397	\$ 3,293,966	\$ 128,339	\$ 15,886	\$ 144,225	\$ 756,069	\$ 90,969	\$ 847,038	26%	28%	26%
Processing / Certification Re-certification	\$ 549,987	\$ 61,110	\$ 611,097	\$ 147,325	\$ 18,209	\$ 165,534	\$ 684,896	\$ 82,626	\$ 767,522	125%	135%	126%
Post Enrollment Verification	\$ 427,239	\$ 47,471	\$ 474,710	\$ 11,185	\$ 1,382	\$ 12,567	\$ 43,144	\$ 5,218	\$ 48,362	10%	11%	10%
IT Programming	\$ 998,460	\$ 110,940	\$ 1,109,400	\$ 45,655	\$ 5,643	\$ 51,298	\$ 222,812	\$ 26,952	\$ 249,764	22%	24%	23%
Pilots	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
CHANGES Program	\$ 238,500	\$ 26,500	\$ 265,000	\$ 21,534	\$ 2,661	\$ 24,195	\$ 81,423	\$ 10,214	\$ 91,637	34%	39%	35%
Studies	\$ 16,745	\$ 1,861	\$ 18,605	\$ -	\$ -	\$ -	\$ 17,763	\$ 1,974	\$ 19,737	0%	0%	106%
Regulatory Compliance	\$ 286,425	\$ 31,825	\$ 318,250	\$ 20,941	\$ 2,588	\$ 23,529	\$ 77,852	\$ 9,400	\$ 87,252	27%	30%	27%
General Administration	\$ 685,350	\$ 76,150	\$ 761,500	\$ 38,063	\$ 4,704	\$ 42,767	\$ 205,740	\$ 24,756	\$ 230,496	30%	33%	30%
CPUC Energy Division	\$ 62,933	\$ 6,993	\$ 69,925	\$ 61	\$ 8	\$ 69	\$ 767	\$ 86	\$ 853	1%	1%	1%
SUBTOTAL MANAGEMENT COSTS	\$ 6,230,208	\$ 692,245	\$ 6,922,453	\$ 413,103	\$ 51,081	\$ 464,184	\$ 2,090,466	\$ 252,195	\$ 2,342,661	34%	36%	34%
CARE Rate Discount [2]	\$ 179,890,427	\$ 22,795,559	\$ 202,685,986	\$ 15,842,279	\$ 1,983,854	\$ 17,826,133	\$ 91,352,356	\$ 19,967,944	\$ 111,320,300	51%	88%	55%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 186,120,635	\$ 23,487,804	\$ 209,608,439	\$ 16,255,382	\$ 2,034,935	\$ 18,290,317	\$ 93,442,822	\$ 20,220,139	\$ 113,662,961	50%	86%	54%
Other CARE Rate Benefits												
- DWR Bond Charge Exemption												
- Wildfire Non-Bypassable Charge Exemption [3]				\$ 457,730		\$ 457,730	\$ 3,089,822		\$ 3,089,822			
- CARE Surcharge Exemption				\$ 1,407,186	\$ 206,625	\$ 1,613,811	\$ 9,226,949	\$ 1,600,319	\$ 10,827,268			
- California Solar Initiative Exemption												
- kWh Surcharge Exemption				\$ 90,275		\$ 90,275	\$ 532,650		\$ 532,650			
- Vehicle Grid Integration Exemption				\$ 60,045		\$ 60,045	\$ 400,649		\$ 400,649			
Total Other CARE Rate Benefits				\$ 2,015,236	\$ 206,625	\$ 2,221,861	\$ 13,250,070	\$ 1,600,319	\$ 14,850,389			
Indirect Costs				\$ 74,599	\$ 9,220	\$ 83,819	\$ 340,942	\$ 41,205	\$ 382,147			

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

2. CARE Rate Discount amounts reflected in Advice Letters 4084-E and 3137-G, effective January 1, 2023.

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

NOTE: Any required prior period corrections/adjustments are reported and reflected herein and supersede the results reported in prior months.

CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration
San Diego Gas & Electric
May 2023

	New Enrollment									Recertification				Attrition (Drop Offs)				Enrollment		Total CARE Participants	Estimated ⁷ CARE Eligible	Enrollment ⁸ Rate % (W/X)	Total Residential Accounts ⁵	Gas Only	Electric Only		
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Non-Scheduled (Duplicates)		Automatic	Total Recertification (L+M+N)	No Response ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)							Gross (K+O)	Net Adjusted (K-T)
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																		
January	13	21	0	34	6,687	334	510	174	7,705	7,739	2,654	5,224	593	8,471	1,859	17	140	10,967	12,983	16,210	-5,244	350,356	301,966	116%	1,353,220	0	144,014
February	1	35	0	36	5,941	487	627	126	7,181	7,217	3,060	3,710	897	7,667	1,407	15	139	2,911	4,472	14,884	2,745	353,101	301,966	117%	1,362,054	0	144,948
March	63	105	0	168	4,903	424	489	130	5,946	6,114	4,340	3,963	496	8,799	2,361	14	306	2,547	5,228	14,913	886	353,987	301,966	117%	1,378,462	0	145,144
April	0	36	0	36	3,457	373	297	114	4,241	4,277	3,213	2,204	425	5,842	2,409	22	249	2,517	5,197	10,119	-920	353,067	301,966	117%	1,392,457	0	144,750
May	60	11	0	71	4,395	210	418	115	5,138	5,209	4,072	2,194	747	7,013	3,334	28	397	2,889	6,648	12,222	-1,439	351,628	301,966	116%	1,396,340	0	144,263
June	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0	-
July	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0	-
August	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0	-
September	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0	-
October	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0	-
November	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0	-
December	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0	-
YTD Total	137	208	0	345	25,383	1,828	2,341	659	30,211	30,556	17,339	17,295	3,158	37,792	11,370	96	1,231	21,831	34,528	68,348	-3,972	351,628	301,966	116%	1,362,054	-	144,948

¹ Enrollments via data sharing between the IOUs.

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

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

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

⁵ Data represents total residential electric customers.

⁶ Data represents total residential electric customers.

⁷ On April 13, 2023, pursuant to OP 189 of D.21-06-015, the investor-owned utilities (IOU) submitted a compliance filing regarding annual estimates of CARE and FERA eligible customers and related information. D.21-06-015 permanently extends the filing date for the annual estimates from December 31 to February 12 each year. On January 18, 2023, Pacific Gas and Electric Company requested an extension of time to comply with the requirement, on behalf of the IOUs, which was subsequently granted.

⁸ 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 3A - Post-Enrollment Verification Results (Model)**San Diego Gas & Electric****May 2023**

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	350,356	2,894	0.8%	1,762	40	1,802	62.3%	0.5%
February	353,101	2,134	0.6%	1,104	19	1,123	52.6%	0.3%
March	353,987	2,141	0.6%	167	21	188	8.8%	0.1%
April	353,067	2,147	0.6%	13	12	25	1.2%	0.0%
May	351,628	2,652	0.8%	4	5	9	0.3%	0.0%
June	0	0	0.0%	0	0	0	0.0%	0.0%
July	0	0	0.0%	0	0	0	0.0%	0.0%
August	0	0	0.0%	0	0	0	0.0%	0.0%
September	0	0	0.0%	0	0	0	0.0%	0.0%
October	0	0	0.0%	0	0	0	0.0%	0.0%
November	0	0	0.0%	0	0	0	0.0%	0.0%
December	0	0	0.0%	0	0	0	0.0%	0.0%
YTD Total	351,628	11,968	3.4%	3,050	97	3,147	26.3%	0.9%

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****May 2023**

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	350,356	269	0.1%	183	12	195	72.5%	0.1%
February	353,101	431	0.1%	298	2	300	69.6%	0.1%
March	353,987	467	0.1%	213	2	215	46.0%	0.1%
April	353,067	156	0.0%	28	2	30	19.2%	0.0%
May	351,628	72	0.0%	0	1	1	1.4%	0.0%
June	0	0	0.0%	0	0	0	0.0%	0.0%
July	0	0	0.0%	0	0	0	0.0%	0.0%
August	0	0	0.0%	0	0	0	0.0%	0.0%
September	0	0	0.0%	0	0	0	0.0%	0.0%
October	0	0	0.0%	0	0	0	0.0%	0.0%
November	0	0	0.0%	0	0	0	0.0%	0.0%
December	0	0	0.0%	0	0	0	0.0%	0.0%
YTD Total	351,628	1,395	0.4%	722	19	741	53.1%	0.2%

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
May 2023

County	Estimated Eligible Households ¹			Total Households Enrolled ²			Enrollment Rate ³		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Orange	16,746	0	16,746	15,939	-	15,939	95%	0%	95%
San Diego	278,595	6625	285,220	328,091	7,598	335,689	118%	115%	118%
Total	295,341	6,625	301,966	344,030	7,598	351,628	116%	115%	116%

¹ On April 13, 2023, pursuant to OP 189 of D.21-06-015, the investor-owned utilities (IOU) submitted a compliance filing regarding annual estimates of CARE and FERA eligible customers and related information. D.21-06-015 permanently extends the filing date for the annual estimates from December 31 to February 12 each year. On January 18, 2023, Pacific Gas and Electric Company requested an extension of time to comply with the requirement, on behalf of the IOUs, which was subsequently granted.

² Total Households Enrolled includes submeter tenants.

³ Penetration Rate and Enrollment Rate are the same value.

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

CARE Table 5 - Recertification Results
San Diego Gas & Electric
May 2023

Month	Total CARE 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	350,356	7,046	2.0%	3,262	3,119	46.3%	0.9%
February	353,101	7,533	2.1%	3,731	1,649	49.5%	0.5%
March	353,987	10,773	3.0%	4,306	602	40.0%	0.2%
April	353,067	5,131	1.5%	1,614	246	31.5%	0.1%
May	351,628	4,523	1.3%	838	118	18.5%	0.0%
June	0	0	0.0%	0	0	0.0%	0.0%
July	0	0	0.0%	0	0	0.0%	0.0%
August	0	0	0.0%	0	0	0.0%	0.0%
September	0	0	0.0%	0	0	0.0%	0.0%
October	0	0	0.0%	0	0	0.0%	0.0%
November	0	0	0.0%	0	0	0.0%	0.0%
December	0	0	0.0%	0	0	0.0%	0.0%
YTD	351,628	35,006	10.0%	13,751	5,734	39.3%	1.63%

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

CARE Table 6 - Capitation Contractors¹
San Diego Gas & Electric
May 2023

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
211 SAN DIEGO		X			115	648
211 ORANGE COUNTY		X			-	-
ALPHA MINI MART	X				-	5
AMERICAN RED CROSS WIC OFFICES		X	X		-	-
CHALDEAN COMMUNITY COUNCIL		X	X		-	-
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	3
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			1	11
MAAC PROJECT		X		X	-	-
NEIGHBORHOOD HEALTH CARE		X			3	5
NORTH COUNTY HEALTH PROJECT, INC.	X				-	-
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	3
SAN YSIDRO HEALTH CENTERS		X			-	2
SCRIPPS HEALTH WIC		X			1	2
SOMALI BANTU ASSOCIATION OF AMERICA		X			-	-
SOMALI FAMILY SERVICES		X			-	-
VISTA COMMUNITY CLINIC		X			-	1
Total Enrollments					120	680

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

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

CARE Program Table 7 - Expenditures for Pilots and Studies
San Diego Gas & Electric
May 2023

2023	Authorized 2021-2026 Budget			Current Month Expenses			Year to Date Expenses			Cycle to Date Expenses		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots												
CARE Outbound Calling Pilot [1]			\$ 80,000	\$ 194	\$ 24	\$ 218	\$ 5,753.56	\$ 654	\$ 6,407	\$ 16,138	\$ 1,843	8%
Studies												
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study [2]			\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 33,268	\$ 4,182	0%
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study [1]			\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study [1]			\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%
Joint IOU - Statewide CARE-ESA Categorical Study [1], [3]			\$ 11,250	\$ -	\$ -	\$ -	\$ 17,763	\$ 1,974	\$ 19,736	\$ 32,007	\$ 3,600	175%
Total			\$ 203,750	\$ 194	\$ 24	\$ 218	\$ 23,516	\$ 2,627	\$ 26,143	\$ 81,413	\$ 9,625	45%

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

2. The 2022 Low Income Needs Assessment Study budget presented in this table authorized is for the program cycle 2021-2026, as authorized in Advice Letter 3478-E and 2828-G.

3. SDG&E is the lead IOU for the Statewide Categorical Eligibility Study. The overage is due to SDG&E funding the study at 100% in advance of IOU reimbursements. The other participating IOU's will be reimbursing SDG&E in 2023 for their portion of the expenses.

NOTE: Any required prior period corrections/adjustments are reported and reflected herein and supersede the results reported in prior months.

CARE Table 8
CARE and Disadvantage Communities Enrollment Rate for Zip Codes
San Diego Gas & Electric
May 2023

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]	CARE Enrollment Rate for DAC (Zip/Census Tract) Codes in High Poverty (with 70% or Less CARE Enrollment Rate) [1]
January	N/A	122%	69%	N/A
February	N/A	123%	70%	N/A
March	N/A	123%	N/A	N/A
April	N/A	123%	N/A	N/A
May	N/A	122%	N/A	N/A
June				
July				
August				
September				
October				
November				
December				
YTD	N/A	123%	69%	N/A

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

CARE Table 8A

CARE Top 10 Lowest Enrollment Rates in High Disconnection, High Poverty, and DAC Communities by Zip Code San Diego Gas & Electric May 2023

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]
92101	72%
92061	72%
91905	75%
92122	81%
92066	90%
92060	93%
92086	96%
92078	97%
92058	110%
92025	113%

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in DAC
92102	126%
91910	129%
91950	136%
92021	138%
92020	139%
92113	139%
91911	149%
92173	170%
92105	172%
92114	178%

Note:

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.

[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

FERA Table 1 - FERA Program Expenses
San Diego Gas & Electric
May 2023

	Authorized Budget [1]	Current Month Expenses	Year to Date Expenses	% of Budget Spent YTD
FERA Program:	Electric	Electric	Electric	Electric
Outreach	\$ 364,691	\$ 5,541	\$ 54,914	15%
Processing / Certification Re-certification	\$ 13,389	\$ 1,590	\$ 7,515	56%
Post Enrollment Verification	\$ 969	\$ 1,122	\$ 2,628	271%
IT Programming	\$ 53,045	\$ 560	\$ 2,630	5%
Pilot(s)	\$ -	\$ -	\$ -	0%
Studies	\$ 50,000	\$ -	\$ -	0%
Regulatory Compliance	\$ 45,920	\$ 4,110	\$ 18,644	41%
General Administration	\$ 73,891	\$ 2,484	\$ 10,729	15%
CPUC Energy Division	\$ 10,488	\$ 14	\$ 171	2%
SUBTOTAL MANAGEMENT COSTS	\$ 612,393	\$ 15,421	\$ 97,231	16%
FERA Rate Discount [2]	\$ 4,170,665	\$ 319,354	\$ 1,919,764	46%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 4,783,058	\$ 334,775	\$ 2,016,995	42%
Indirect Costs		\$ 3,865	\$ 16,732	

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

2. FERA Discount budget amount reflected in Advice Letter 4084-E, effective January 1, 2023.

NOTE: Any required prior period corrections/adjustments are reported and reflected herein and supersede the results reported in prior months.

FERA Table 2 - Enrollment, Recertification, Attrition, & Penetration
San Diego Gas & Electric
May 2023

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment		Total FERA Participants	Estimated FERA Eligible ⁵	Enrollment ⁵ Rate % (WX)
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)			
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)															
January	0	0	0	0	278	10	23	7	318	318	17	107	1	125	88	1	61	373	523	443	-205	12,043	42,980	28%
February	0	0	0	0	214	9	31	3	257	257	19	51	1	71	84	1	87	236	408	328	-151	11,892	42,980	28%
March	0	5	0	5	206	12	35	2	255	260	20	92	2	114	99	0	60	150	309	374	-49	11,843	42,980	28%
April	0	2	0	2	161	3	18	1	183	185	23	40	1	64	100	0	87	109	296	249	-111	11,732	42,980	27%
May	0	0	0	0	179	2	14	1	196	196	27	32	5	64	154	2	107	162	425	260	-229	11,503	42,980	27%
June	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	42,980	0%
July	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	42,980	0%
August	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	42,980	0%
September	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	42,980	0%
October	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	42,980	0%
November	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	42,980	0%
December	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	42,980	0%
YTD Total	0	7	0	7	1,038	36	121	14	1,209	1,216	106	322	10	438	525	4	402	1,030	1,961	1,654	-745	11,503	42,980	27%

¹ Enrollments via data sharing between the IOUs.

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

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

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

⁵ On April 13, 2023, pursuant to OP 189 of D.21-06-015, the investor-owned utilities (IOU) submitted a compliance filing regarding annual estimates of CARE and FERA eligible customers and related information. D.21-06-015 permanently extends the filing date for the annual estimates from December 31 to February 12 each year. On January 18, 2023, Pacific Gas and Electric Company requested an extension of time to comply with the requirement, on behalf of the IOUs, which was subsequently granted.

⁶ 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 3A - Post-Enrollment Verification Results (Model) San Diego Gas & Electric May 2023								
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	12,043	93	0.8%	70	0	70	75.3%	0.6%
February	11,892	67	0.6%	39	2	41	61.2%	0.3%
March	11,843	67	0.6%	2	0	2	3.0%	0.0%
April	11,732	62	0.5%	1	0	1	1.6%	0.0%
May	11,503	79	0.7%	0	0	0	0.0%	0.0%
June	0	0	0.0%	0	0	0	0.0%	0.0%
July	0	0	0.0%	0	0	0	0.0%	0.0%
August	0	0	0.0%	0	0	0	0.0%	0.0%
September	0	0	0.0%	0	0	0	0.0%	0.0%
October	0	0	0.0%	0	0	0	0.0%	0.0%
November	0	0	0.0%	0	0	0	0.0%	0.0%
December	0	0	0.0%	0	0	0	0.0%	0.0%
YTD Total	11,503	368	3.2%	112	2	114	31.0%	1.0%

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

FERA Table 3B Post-Enrollment Verification Results (Electric only High Usage) San Diego Gas & Electric May 2023								
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	12,043	0	0.0%	0	0	0	0.0%	0.0%
February	11,892	0	0.0%	0	0	0	0.0%	0.0%
March	11,843	0	0.0%	0	0	0	0.0%	0.0%
April	11,732	0	0.0%	0	0	0	0.0%	0.0%
May	11,503	0	0.0%	0	0	0	0.0%	0.0%
June	0	0	0.0%	0	0	0	0.0%	0.0%
July	0	0	0.0%	0	0	0	0.0%	0.0%
August	0	0	0.0%	0	0	0	0.0%	0.0%
September	0	0	0.0%	0	0	0	0.0%	0.0%
October	0	0	0.0%	0	0	0	0.0%	0.0%
November	0	0	0.0%	0	0	0	0.0%	0.0%
December	0	0	0.0%	0	0	0	0.0%	0.0%
YTD Total	11,503	0	0.0%	0	0	0	0.0%	0.0%

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

FERA Table 4 - Enrollment by County
San Diego Gas & Electric
May 2023

County	Estimated Eligible Households ¹			Total Households Enrolled ²			Enrollment Rate ³		
	Urban	Rural	Total	Urban	Rural ³	Total	Urban	Rural	Total
Orange	2,331	0	2,331	455	0	455	20%	0%	20%
San Diego	39,417	1,232	40,649	10,780	268	11,048	27%	22%	27%
Total	41,748	1,232	42,980	11,235	268	11,503	27%	22%	27%

¹ On April 13, 2023, pursuant to OP 189 of D.21-06-015, the investor-owned utilities (IOU) submitted a compliance filing regarding annual estimates of CARE and FERA eligible customers and related information. D.21-06-015 permanently extends the filing date for the annual estimates from December 31 to February 12 each year. On January 18, 2023, Pacific Gas and Electric Company requested an extension of time to comply with the requirement, on behalf of the IOUs, which was subsequently granted.

² Total Households Enrolled includes submeter tenants.

³ Penetration Rate and Enrollment Rate are the same value.

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

FERA Table 5 - Recertification Results
San Diego Gas & Electric
May 2023

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	12,043	287	2.4%	0	233	0.0%	1.9%
February	11,892	300	2.5%	23	174	7.7%	1.5%
March	11,843	356	0.0%	17	96	4.8%	0.8%
April	11,732	210	0.0%	8	42	3.8%	0.4%
May	11,503	246	0.0%	5	21	2.0%	0.2%
June	0	0	0.0%	0	0	0.0%	0.0%
July	0	0	0.0%	0	0	0.0%	0.0%
August	0	0	0.0%	0	0	0.0%	0.0%
September	0	0	0.0%	0	0	0.0%	0.0%
October	0	0	0.0%	0	0	0.0%	0.0%
November	0	0	0.0%	0	0	0.0%	0.0%
December	0	0	0.0%	0	0	0.0%	0.0%
YTD	11,503	1,399	12.2%	53	566	3.8%	4.9%

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

FERA Table 6 - Capitation Contractors¹
San Diego Gas & Electric
May 2023

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
211 SAN DIEGO		X			1	14
211 ORANGE COUNTY		X				
ALPHA MINI MART	X				-	-
AMERICAN RED CROSS WIC OFFICES		X	X		-	-
CHALDEAN COMMUNITY COUNCIL		x	X			
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	-
COMMUNITY RESOURCE CENTER		X			-	-
ELDERHELP OF SAN DIEGO		X			-	-
HEARTS AND HANDS WORKING TOGETHER		X			-	-
HOME START		X			-	-
HORN OF AFRICA		X			-	-
INTERFAITH COMMUNITY SERVICES		X			-	-
LA MAESTRA FAMILY CLINIC		X			-	-
MAAC PROJECT		X		X	-	-
NEIGHBORHOOD HEALTH CARE		X			-	-
NORTH COUNTY HEALTH PROJECT, INC.	X				-	-
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	-
SAN YSIDRO HEALTH CENTERS		X			-	-
SCRIPPS HEALTH WIC		X			-	-
SOMALI BANTU ASSOCIATION OF AMERICA		X			-	-
SOMALI FAMILY SERVICES					-	-
VISTA COMMUNITY CLINIC		X			-	-
Total Enrollments					1	14

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

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