

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

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

Application 19-11-003
(Filed November 4, 2019)

And Related Matters.

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

**MONTHLY REPORT OF SAN DIEGO GAS & ELECTIC COMPANY (U 902 M) ON
LOW-INCOME ASSISTANCE PROGRAMS FOR JULY 2024**

Siobhán E. Murillo

Attorney for
SAN DIEGO GAS & ELECTRIC COMPANY
8330 Century Park Court, CP32D
San Diego, CA 92123-1530
Telephone: (619) 616-0624
Facsimile: (619) 699-5027
Email: smurill1@sdge.com

August 21, 2024

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This is the July monthly report for program year (PY) 2024. 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 (CPUC) Energy Division with information to assist in analyzing the low-income programs.¹

This report presents year-to-date CARE, FERA, and ESA Program results and expenditures through July 31, 2024, for San Diego Gas & Electric Company (SDG&E).

Respectfully Submitted,

/s/ Siobhán E. Murillo

Siobhán E. Murillo

Attorney for

SAN DIEGO GAS & ELECTRIC COMPANY

8330 Century Park Court, CP32D

San Diego, CA 92123-1530

Telephone: (619) 616-0624

Facsimile: (619) 699-5027

E-mail: smurill1@sdge.com

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¹ Pursuant to Decision (D.) 21-06-015, SDG&E will file monthly Family Electric Rate Assistance (FERA) reports, combined with this report, after Energy Division 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

In 2021, the California Public Utilities Commission (Commission) voted and unanimously approved, with modifications, the Decision on Large Investor-Owned Utilities' (IOUs) and Marin Clean Energy's California Alternate Rates for Energy (CARE), Energy Savings Assistance (ESA), and Family Electric Rates for Energy (FERA) Program Applications for Program Years 2021-2026, which authorized budgets and goals effective July 1, 2021.¹ The authorized program year budgets, savings goals, and homes treated targets in this monthly report reflect those authorized by the Commission in Decision (D.) 21-06-015 (Decision).² The Decision approved the 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.³ 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,⁴ and the implementation of the Pilot Plus and Pilot Deep Program that focuses on gathering the feasibility of a more strategic measure delivery approach.⁵

1. ESA PROGRAM EXECUTIVE SUMMARY

The ESA Program offers no-cost weatherization services, energy efficient lighting, energy efficient appliances, energy education, and other services to income-qualified customers to reduce energy consumption and costs, while improving health, comfort, and safety of

¹ D.21-06-015 at Ordering Paragraph (OP) 3 and at OP 82.

² *Id.*

³ *Id.* at OP 57.

⁴ *Id.* at OP 119.

⁵ *Id.* at OP 38.

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 provides services to single family and mobile homeowners and renters. The program design is focused on achieving energy savings through targeted outreach efforts, while continuing to offer health, comfort, and safety to low income customers. Richard Heath and Associates (RHA) is the primary implementer of ESA Main services including Outreach and Assessment, Weatherization, Appliance Installation, Natural Gas Appliance Testing (NGAT) and Inspections of gas appliance installation. THA Heating Plumbing & Air and Staples Energy provide Heating Ventilation and Air Conditioning (HVAC) and Water Heater Repair and Replacement (R&R) Services.

SDG&E's Southern Multifamily Whole Building (MFWB) Program offers ESA Services for In-Unit, Common Area Measures (CAM), and Whole Building (WB) Measures under one Program to Deed Restricted and Non-Deed Restricted multifamily buildings. SDG&E is the lead utility on behalf of Southern California Edison Company (SCE) and Southern California Gas Company (SoCalGas) for the Southern Region MFWB program.⁶

The ESA Pilot Plus and Pilot Deep Program (Pilot), the Energy Division's Staff Proposal approved by the Commission in D.21-06-015, 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%.

⁶ *Id.* at OP 120.

SDG&E’s total 2024 authorized ESA Portfolio budget is \$30,210,212.⁷ In July 2024, SDG&E’s total costs for the ESA Portfolio were \$12,430,758. This month’s activities for the ESA Programs are included below.

1.1. ESA Program Overview

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

ESA Main Program

In July 2024, the ESA Main program continued to see progress towards its homes treated targets and energy savings goals. Some implementation highlights for the month of July include:

- SDG&E applied a new energy savings methodology to better align savings assumptions with the low income sector, as described in Section 1.1.2,
- SDG&E kicked off a third-quarter targeted outreach campaign to mail Home Energy Savings Kits to 7,000 customers that did not open previous direct marketing emails, and
- RHA launched online enrollment to streamline the collection of eligibility and property owner approval (POA) documentation during the enrollment process.

ESA Table 1.1.1.1 compares the authorized budget and targets for program year 2024 to actual progress to date for the ESA Main program.

ESA Table 1.1.1.1⁸ ESA Main (SF, MH) Program Summary Expenses for 2024			
	2024 Authorized / Planning Assumptions⁹	Actual to Date¹⁰	%

⁷ D.21-06-015 at Attachment 1, Table 7 and includes \$315,260 of SASH/MASH unspent funds (see table ESA Table 1.1.1.5).

⁸ SDG&E notes that the program experienced an error when calculating and reporting out its kWh and therms for LED lighting dating back to the April 2024 Report. The correction resulted in an increase in savings under kWh and a decrease in therms from the previous reporting period.

⁹ Pursuant to D.21-06-015, planning assumptions for savings goals and homes treated target are based on annual Main ESA Program allocation of the overall Program Cycle Goals and Targets, Attachment 1, Tables 5 and 6.

¹⁰ As shown in ESA Monthly Report Tables 1 and 2.

Budget ¹¹	\$18,876,805	\$10,503,266	56%
Homes Treated	3,983	2,967	74%
kWh Saved ¹²	1,496,098	535,025	36%
kW Demand Reduced	218	41	19%
Therms Saved	42,191	10,365	25%
GHG Emissions Reduced (Metric Tons of CO ₂ e) ¹³	N/A	429	N/A

ESA Table 1.1.1.2 below provides the ESA Main Program percentage of administrative spend of total program costs.

ESA Table 1.1.1.2 ESA Main Program Administrative Expenses for 2024		
	July 2024	YTD¹⁴
Administrative Expenses	\$96,268	\$806,530
Total Program Costs	\$1,822,651	\$10,503,266
% of Administrative Spend	5.28%	7.68%

¹¹ ESA Main program budget includes measures and program administrative budget categories as shown on ESA Monthly Report Table 1.

¹² Pursuant to Table 5 of Attachment 1, D.21-06-015, the 2024 goals for kWh, kW, and therms include ESA Main, MF CAM and MFWB, however, the table above reports results only from the Main ESA Program only.

¹³ Derived by utilizing the United States Environmental Protection Agency Greenhouse Gas Equivalencies Calculator.

¹⁴ Pursuant to D.21-06-015 at OP 112, “Pacific Gas and Electric Company, Southern California Edison Company, Southern California Gas Company and San Diego Gas & Electric Company’s Energy Savings Assistance (ESA) program administrative expenses are capped at either 10 percent of total program costs or the Utility’s historical five-year average spend on administrative costs as a percentage of total program costs, whichever is greater. The use of the historical five-year average spend will be phased out such that the Utilities must propose to spend no more than 10 percent of total program costs on administrative costs starting in program year 2024. The definition and categorization of administrative cost for the ESA program will be consistent with that of the main energy efficiency program.”

In July 2024, SDG&E's ESA Main YTD administrative expenses are below the administrative cap of 10%.

ESA MFWB

In July 2024, SDG&E's Southern MFWB Program continued to experience challenges related to invoice documentation discrepancies, which necessitate invoices to be returned to RHA for correction. SDG&E continues to hold recurring meetings with RHA specifically focused on invoicing to ensure invoices are submitted accurately to ensure timely payment. As issues are identified, modifications to the Quality Assurance checklist are incorporated to improve future invoice submittals and minimize delays.

Additionally, on June 28, 2024, SDG&E and RHA executed a contract amendment that addressed in-unit measure pricing. These updates resulted in invoicing temporarily being suspended, as both SDG&E's and RHA's systems were updated to reflect these changes. SDG&E was able to process invoices and payout invoices towards the end of the month and any pending July invoices will be reported in next month's report. Additionally, SDG&E is working to resolve EECP system performance issues that help reduce occasional disruptions in processing and invoicing. SDG&E has planned a series of enhancements aimed at improving system stability and performance. These enhancements will be implemented in the coming weeks and months and are designed to ensure that the system can effectively handle future demands and changes.

RHA has expressed concerns from the subcontractors regarding timely compensation due to system related issues. SDG&E remains committed to mitigating these concerns and improving the program's performance.

ESA Table 1.1.1.3 below compares the authorized budget and targets for program year 2024 to actual progress to date for SDG&E’s portion of the MFWB program.

ESA Table 1.1.1.3¹⁵ MFWB (In-Unit, CAM, WB) Summary of Expenses for 2024			
	2024 Authorized / Planning Assumptions¹⁶	Actual to Date	%
Budget ¹⁷	\$9,014,088	\$1,563,093	17%
SPOC Budget	\$477,376	\$136,912	29%
Properties Treated	18	0	0%
Homes Treated (in-units)	10,155	523	5%
kWh Saved	1,273,901	16,073	1%
kW Demand Reduced	180	1	1%
Therms Saved	73,198	3,098	4%
GHG Emissions Reduced (Tons)	N/A	12.2	N/A

Pilot Plus/Pilot Deep (ESA Whole Home)

Since the contract award to Maroma Energy Services (Maroma) in January 2024, SDG&E continues ramp up activities for the Pilot, including setup of internal system, development of marketing and outreach materials, creation of KPI reporting templates, and development of internal reporting dashboard.

To date, the email marketing campaign that launched in April 2024 has resulted in 43 leads. Subcontractors have started following up on customer leads to determine if they will qualify for program enrollment. Maroma continues its outreach efforts through outbound phone

¹⁵ SDG&E notes that the program experienced an error when calculating and reporting out its kWh and therms for LED lighting dating back to the April 2024 Report. The correction resulted in an increase in savings under kWh and a decrease in therms from the previous reporting period.

¹⁶ Pursuant to D.21-06-015, planning assumptions for savings goals and homes treated target are based on annual ESA MFWB Program allocation of the overall Program Cycle Goals and Targets, Attachment 1, Tables 5 and 6.

¹⁷ MFWB program budget includes MF In-Unit, CAM, WB, and Implementer administrative budget categories as shown on ESA Monthly Report Table 2A.

campaigns in preparation for enrollments. Maroma is targeting 50 homes for treatment in 2024.

Initial discussions with The Harris Group (THG),¹⁸ a current third-party contractor supporting CARE and FERA Program enrollments, have been focused on leveraging their capabilities and relationships to ensure customers meet specific criteria for the Pilot before dispatching trucks, thereby securing quality leads for Maroma.

ESA Table 1.1.1.4 Pilot Plus and Pilot Deep Summary Expenses for 2024			
	2024 Authorized / Planning Assumptions¹⁹	Actual to Date²⁰	%
Budget ²¹	\$1,526,683	\$227,487	15%
Homes Treated	50	0	0%
kWh Saved	N/A	0	N/A
kW Demand Reduced	N/A	0	N/A
Therms Saved	N/A	0	N/A
GHG Emissions Reduced (Tons)	N/A	0	N/A

¹⁸ THG is a Diverse Business Enterprise (DBE) vendor and a woman-owned business.

¹⁹ Home treatment, energy savings, and GHG emissions reduction targets were not included in D.21-06-015. SDG&E will report on actual achievements upon completion of home treatment.

²⁰ Actual homes treated, savings and GHG emissions reduction values are reported when projects have been fully closed (i.e., inspected, issues resolved, permits closed, as applicable) and reported by Pilot Implementer to SDG&E. Energy savings are estimates provided by energy modeling software. SDG&E intends to report these estimates as interim savings until meter-based savings estimates are reportable.

²¹ Pilot Plus and Pilot Deep budget and expenditures are reflected in ESA Monthly Report Table 2B and is based on the annual budget directed in D.21-06-015, Table 11 of Attachment 1. An additional \$2,824,866 from previous program years are available to carry forward, as directed in OP 181 of the Decision.

SASH/MASH Unspent Funds

On October 31, 2023, SDG&E submitted AL 4285-E.²² In the AL, SDG&E requested to transfer the unspent SASH/MASH funds to the ESA programs.²³ The transferred funds will be used primarily to support the ESA Main program implementation across the current program cycle, including to provide energy efficiency (EE) measures and services to single family, mobile homeowners, and renters at no cost to qualifying low-income customers. SDG&E also sought flexibility to utilize the SASH and MASH funds across EE budget categories and other ESA programs and pilots like the MFWB Program and Pilot Plus/Pilot Deep Program.²⁴ The AL became effective on November 30, 2023. SDG&E intends to utilize the available SASH/MASH unspent funds by the end of the program cycle and will report on this activity in a future report.

ESA Table 1.1.1.5 Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Unspent Funds (Electric IOUs Only)²⁵ for 2024			
	2024 Authorized/Planning Assumptions	Actual YTD	% YTD
Budget	\$315,260	0	0

²² See SDG&E AL 4285-E (October 31, 2023), available at https://tariff.sdge.com/tm2/pdf/submittals/ELEC_4285-E.pdf.

²³ SDG&E requested authorization to transfer the funds from the SDG&E CSIBA to SDG&E’s ESA Core Balancing Account, in which cost of the measures and installations are currently recorded. SDG&E’s ESA Program Balancing Account is the Low Income Energy Efficiency - Electric (LIEEBA).

²⁴ D.21-06-015 at OPs 39 and 123.

²⁵ SDG&E’s AL 4285-E was approved and effective on November 30, 2023.

1.1.2. Program Measure Changes

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

In July 2024, SDG&E applied its new low income energy savings methodology to energy savings calculations for the ESA Main program year-to-date.²⁶ The implementation of the new savings methodology resulted in a moderate increase in ESA Main's overall electric and therm savings due to new measure saving source assumptions for the majority of measures.

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.

ESA Main (SF and MH) Program Contractor Outreach

SDG&E, in collaboration with RHA, continued to implement a targeted outreach and engagement campaign aimed at customers that have been identified as likely to meet income qualifications and have high energy savings potential. In July 2024, a subset of approximately 7,000 customers that did not open previous direct marketing emails were selected to receive a Home Energy Savings Kit (Kit)²⁷ in the mail. These Kits include a call-to-action directing customers to contact RHA to take advantage of the ESA Main program. The Kits are being mailed out in batches over the third quarter (Q3) of this year.

In July 2024, RHA added an online enrollment option to its website building upon the success of the online interest form at generating high value program leads. This new feature

²⁶ SDG&E's new savings methodology revises the prioritization of savings sources and support documentation to better align savings estimates with the low income sector. The methodology was presented to the ESA Policies and Procedures & Installation Standards (PP/IS) Manual Sub Working Group on June 12, 2024 and to the ESA Working Group on June 27, 2024. There were no stakeholder objections to this proposal.

²⁷ Kits consist of easy to install EE measures that are mailed to eligible participants. The kits include: lightbulbs (3); faucet aerators (2), low flow shower head, and a toilet bank.

allows customers to securely submit eligibility and property owner approval (POA) documentation electronically which streamlines time spent by residential outreach specialists on document collection and verification, especially for renter participants.

In July 2024, the ESA Main Program enrolled 748 customers, which represents a 10% increase from the previous month.

ESA Southern MFWB (In-Unit, CAM, and WB) Program

In July 2024, RHA reported ongoing robust program interest from property owners and trade allies. RHA concentrated on cultivating relationships with property owners and industry stakeholders to facilitate ongoing new program enrollments. They provided program participants with scheduling flexibility, offering property owners multiple dates for assessments.

Furthermore, RHA collaborated with authorized ESA subcontractors to facilitate in-unit treatments for properties. In SDG&E's service territory, the Program successfully completed 433 in-unit treatments for the month of July, bringing the year-to-date total for SDG&E to 523 in-units treated. RHA reported completing 28 property enrollments, and 22 property assessments in July. This brings the total whole building enrollments to 249 properties (68 in SDG&E's service territory, 7 in SCE's service territory, 75 in SoCalGas's service territory, 96 in SCE/SoCalGas's combined service territory, and 3 in SoCalGas's/SDG&E's combined service territory), and 210 completed property assessments. The 249 enrolled properties total 26,332 potential in-units enrolled for treatment. Additionally, RHA continues to work on a pipeline of 1,207 qualified leads in the southern service territory. The Program's lead-to-enrollment conversion rate is 21%, with 84% enrolled properties progressing to an assessment. Five percent of properties opted out of the MFWB Program, while 2% of assessed properties have completed CAM/WB construction and are pending invoicing.

As mentioned in previous reports, the Program experienced a slower start than anticipated. The factors listed below provide an overview of the challenges.

- **ESA Subcontractor Adjustment:** One of the major challenges is the adjustment of ESA subcontractors to the new program structure, pricing, and the contractual compensation holdback tied to performance.
 - **Mitigation:** To address this challenge SDG&E took several steps, including making updates to contract terms and renegotiating measure pricing. The executed contract amendment was dated 6/28/24. The Program also incorporated additional flexibility by allowing treatment pathways for stand alone in-unit treatments or CAM only projects for properties that are not interested in whole building treatment.
- **Tenant Income Documentation:** Some property owners are hesitant to provide proof of tenant income documentation, which is essential for program compliance.
 - **Mitigation:** The utilities, MFWB Implementers and Energy Division have modified and streamlined the process through the MFWB Policy and Procedures (P&P) working group. The Program will allow Deed Restricted Property owners to self-attest eligibility and Non-Deed Restricted Properties will still need to provide income documentation as part of enrollment. These updates will be available in Version 2 of the MFWB P&P, released on July 1, 2024, with Version 3 scheduled to release towards the end of the year.

SDG&E and RHA are expecting in-unit treatments to accelerate now that the compensation and enrollment documentation challenges have been addressed. SDG&E and RHA remain committed to working through the challenges and delivering the Programs savings and treatment goals.

ESA Pilot Plus and Pilot Deep Outreach Preparation

The Outreach team has identified 24 community-based organizations (CBOs) in targeted Climate Zones to partner with to support the Pilot messaging. In July 2024, the Outreach team

partnered with two CBOs to provide presentations and share the program flyer. These partners help educate customers and increase outreach and engagement efforts using a variety of tactics, including messaging through email and social media channels such as Facebook, X, and Instagram, posting information on their websites, and providing booth space at events in targeted areas.

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
Arabic	2
Total	2

Tribal Outreach

There are 17 Federally recognized tribes and 3 non-Federally recognized tribes within the SDG&E service territory, each with very different priorities and resources. The SDG&E team continues to prioritize low-income program outreach to hard-to-reach areas where tribal members reside. Additionally, SDG&E has established support systems with Indian Health Councils, Southern California American Indian Resource Center (SCAIR), and Southern California Tribal Chairmen’s Association (SCTCA) to reach tribal community members in need.

In July 2024, SDG&E partnered with Intertribal Long Term Recovery Foundation, San Diego State University and Climate Science Alliance to conduct a workshop to share information on emergency preparedness and low income customer programs to tribal leaders, staff, and first responders. The feedback received from the participants was the desire to create tribal fire crews

and replicate the model agreement between SDG&E and Pala Band of Mission Indians that invests in tribal fire crews to conduct vegetation management within and around their reservations. Additionally, the priorities from tribes continue to be backup power for the most vulnerable community members and identifying existing wells without backup power on the reservation.

Seven of the 17 tribes that SDG&E serves have been identified as having potentially eligible tribal members for Customer Assistance programs and have been approached with a mini grant opportunity. To date, three tribes have received payments. The Outreach team updated the tribal contacts to ensure the proper recipients received information on the mini grant opportunity and followed up with the remaining four tribes.

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

Awareness Marketing

In July 2024, SDG&E continued the 2024 awareness campaign featuring updated creative ads. The streaming audio component achieved 139,086 impressions and 1,604 clicks, resulting in 35 customers proceeding to the application. Digital display ads generated over 977,000 impressions with a 16.87% CTR, while paid social media efforts yielded over 741,000 impressions and a 0.83% CTR. Video ads resulted in 209,023 impressions, with a CTR of 0.10%.

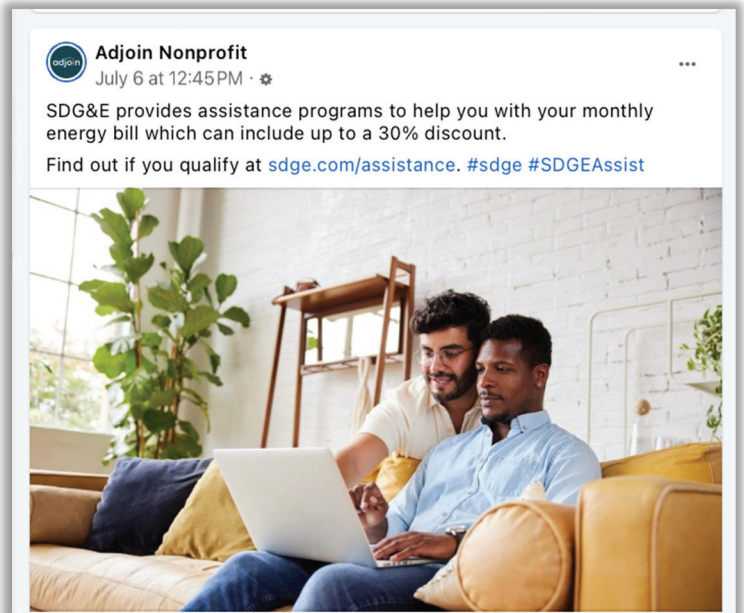
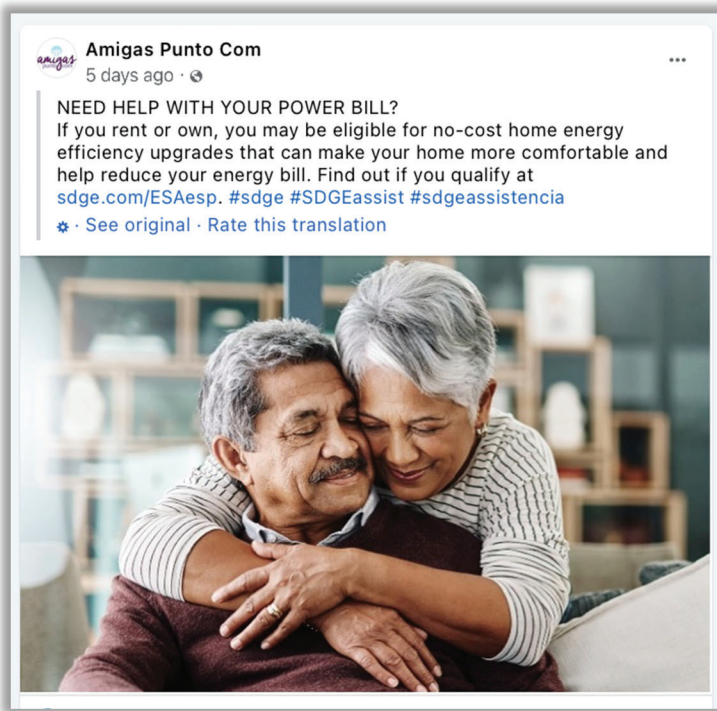
Direct Marketing

In July 2024, SDG&E continued direct communications and sent 3,180 emails as part of the ESA kit campaign. This email informed customers that an ESA kit was on the way and if they were interested in additional upgrades, they should contact RHA. The email garnered a 57% open rate and a 3.6% CTR.

Social Media

SDG&E utilizes social media to post messages to a collective audience of more than 1.3 million followers across its multiple social media channels, including Facebook, Instagram, LinkedIn, Nextdoor, Threads and X.

Additionally, the Energy Solutions Partner Network distributes messaging informing the public of customer assistance programs. In July 2024, the Energy Solutions Partner Network shared over 40 customer assistance messages to more than 129,000 customers through e-newsletters, website posts, and social media channels.



Live CARE Call Campaign

SDG&E's third-party contractor, THG,²⁸ calls targeted customers to encourage enrollment in the CARE and FERA Programs. The campaign provides SDG&E with a way to

²⁸ THG is a Diverse Business Enterprise (DBE) vendor and a woman-owned business.

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. If eligible, THG enrolls customers in the CARE and FERA programs over the phone.

The Harris Group²⁹	
ESA Leads	2,822
CARE Enrollments	1,230
CARE Recertifications	519
FERA Enrollments	723
FERA Recertifications	23

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 income

²⁹ Due to the timing of collection of enrollment data for specific groups, numbers throughout this report may vary slightly based on the reporting timeframe for each month.

qualifying programs using a variety of tactics, including messaging through email and social media channels such as Facebook, X, and Instagram, posting information on their websites, providing booth space at events, and hosting enrollment day fairs at their locations. SDG&E’s partner outreach activities resulted in the following activities this month:

Energy Solutions Partner Network	
ESA Leads	6
CARE Enrollments	20
CARE Recertifications	3
FERA Enrollments	0
FERA Recertifications	0

Partner Spotlight

In July 2024, SDG&E’s Community Outreach and Engagement team participated in over 40 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, including food drives and community events. These outreach activities were focused on engaging customers with customer assistance programs such as CARE, FERA, and ESA and reached over 4,400 customers. A few of the outreach events SDG&E participated in are highlighted below.

City of San Diego

On July 13, 2024, SDG&E Outreach partnered with The San Diego Humane Society for the “Bark in the Barrio: Memorial Dog Park 2nd Annual Celebration.” The City of San Diego, through the Humane Society, provided free pet treats, free pet clothes, discounted vaccines, free training tips, and a pet obstacle course. SDG&E was in attendance providing information on

programs and services, including Customer Assistance information. Other community partners provided free family resources and information, activities for children, including arts and crafts.

Somali Family Services

On July 7, 16, and 30, 2024, the Somali Family Services (SFS) hosted community food distribution events for those in need. SFS is a community-based social service organization that provides culturally and linguistically appropriate programs and services to refugee and immigrant communities of San Diego. SDG&E participated in the event and distributed Customer Assistance information to those in attendance.

Multicultural Outreach

To continue efforts to reduce potential barriers, increase education, and increase program enrollments for customers in the rural, multicultural/multilingual, and AFN segments, SDG&E pairs multicultural contractors with employees who are fluent in various languages to help staff events and presentations. These contractors are fluent in Spanish, Chinese, Aramaic/Arabic, and other languages, as requested.

Activity Date	Activity Title	Association Partners	Location
7/6/2024 7/13/2024	Cultural Food Pantry Distribution	Union of Pan Asian Communities (UPAC)	UPAC Office 5296 University Ave San Diego, 92105

Additional Customer Engagement Efforts

In addition to SDG&E’s ME&O efforts described above, SDG&E also employs 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 Care 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 also promotes CARE at its Authorized

Payment Locations (APLs), and its Outreach team assists at Branch Office locations seasonally to help enroll customers.

The Outreach team partnered with the Branch Offices to increase awareness about the proposal to close the four remaining Branch Offices and educate customers about alternate payment options including Authorized Payment Locations (APLs) and My Account.³⁰ In July, 2024, SDG&E provided nine My Account workshops about the potential branch office closures, where customers were educated about the My Account tool, electronic payment options, going paperless, and My Account enrollment support. Additionally, customers were made aware of the upcoming transition of My Account to My Energy Center, which is scheduled to occur in August 2024.

SDG&E's CCC, Branch Offices, and Payment Offices promote and offer the CARE, FERA, and ESA Programs to potentially eligible customers and enroll customers directly into the CARE Program over the telephone.³¹ During this reporting month, SDG&E's CCC and Branch Offices generated the following applications and leads over the telephone:

³⁰ See SDG&E Advice Letter 4447-E-A/3304-G-A San Diego Gas & Electric Company Advice Letter Requesting Approval For Closure Of Four Remaining Branch Offices Pursuant To Decision 22-06-008, *available at* <https://tariffsprd.sdge.com/view/filing/?utilId=SDGE&bookId=ELEC&flngKey=7198&flngId=4447-E-A&flngStatusCd=Approved>.

³¹ 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.

	CCC	Branch Office
ESA Leads	2	2
CARE Enrollments	0	104
CARE Recertifications	3	12
FERA Enrollments	0	1
FERA Recertifications	0	0

1.2.3. Managing Energy Use

As part of the ESA Programs In-Home Energy Education, customers are given information about tools and services available to help manage and reduce energy use. Customers who are not already enrolled in My Account will be enrolled and provided with an overview of resources available to them to help manage energy use, including the Power Saver Rewards Program, a voluntary, penalty-free program that pays participants for reducing their energy use during times of high demand or other emergencies.

During In-Home Assessment, a residential outreach specialist reviews the setting of the various appliances and explains to the customer how to maximize the settings to reduce energy usage. In addition, if a customer qualifies for a new smart thermostat, they are given information at the time of installation on how to use 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. Year to date, 376 Tier II power strips and 156 smart thermostats have been installed.

1.2.5 Additional Activities

There are no additional activities to report on for July 2024.

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

1.3.1 Please provide a status on referrals, of the leveraging and coordination effort with CSD. Expand on activities and success rates across the list of programs from the Coordination Workshop, such as Affordable Broadband and Lifeline, as applicable to ESA, CARE and FERA. What new steps or programs have been implemented? What was the result in terms of new enrollments? Please also provide coordination efforts with the TECH program.

As part of the transition to the implementer model, SDG&E ceased contracting directly with local Low Income Home Energy Assistance Program (LIHEAP) agencies. However, RHA is subcontracting with both San Diego LIHEAP contractors, MAAC and Campesinos Unidos, to continue leveraging enrollment efforts. There were no LIHEAP referrals to ESA Main in July 2024.

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 sent directly to the ESA Program implementer. In support of California Emerging Technology Fund's (CETF) efforts to provide eligible Californians with affordable internet services, SDG&E continues to provide customers visiting SDG&E's assistance website with a link to the CETF website. In July 2024, SDG&E and CETF met to discuss current call volumes to identify opportunities to improve referrals from SDG&E's website to the CETF call center. In response to that discussion, the SDG&E assistance website language was updated and CEFT was invited to participate in the Mid-Year Updates webinar on July 26, 2024, where CBOs were educated about affordable internet services. Additionally, an updated flyer was requested to share with SDG&E's network of CBOs to help increase program awareness.

1.3.2 Please provide a status on coordination with TECH Clean California

Since the beginning of the year SDG&E and TECH have met to discuss possible coordination between TECH Clean California and SDG&E ESA Programs. Tech Clean California funds are available to support installation of heat pump HVAC and water heaters technology across California. The best candidates for this technology are high heating/high cooling load households, which are not particularly predominate in the San Diego area. As the ESA Pilot Plus/Pilot Deep program starts to enroll and assess households, the opportunity to leverage TECH funding for heat pump technology will be considered. SDG&E and TECH will regroup in the third quarter to continue the discussion.

1.4. ESA 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.

RHA takes a proactive approach to workforce education and training by facilitating regular on the job training via quarterly and monthly meetings, tailboards, and quality assurance ride-alongs. RHA also maintains a subcontractor portal that provides access to available training and certification programs and promotes the Energize Careers Programs among its subcontractors.

In July 2024, RHA launched the San Diego LEARN Program, which markets and offers free EE and electrification courses.³²

When issues or concerns arise that identify specific workforce education and training needs, both SDG&E and RHA work with contractors to develop and implement Corrective and

³² See The San Diego Learn Program, *available at* <https://www.sandiegolearn.com/>.

Preventative Action (CAPA) Plans or Process Improvement Plans (PIP). These respective processes are typically timebound efforts to investigate, plan, deploy, and track corrective actions and process improvements.

RHA also partners with Upskill California, a consortium of 28 community colleges across the state. This collaboration aims to establish connections between job seekers graduating from pre-employment and construction education programs at these colleges and ESA contractors. By leveraging these initiatives, RHA seeks to enhance training opportunities and foster employment pathways for individuals entering the workforce.

RHA continues to promote employment opportunities in the communities it serves by providing flyers and information to customers.

For the Southern MFWB Program, RHA held bi-weekly individual meetings with subcontractors to assign properties and provide ongoing training and program support. The RHA Program team also offered regular training sessions on the MFWB Program and systems for subcontractors during Q1 2024. Additionally, ad hoc support and meetings were held on an ongoing basis as subcontractors had impromptu questions about measure feasibility, NGAT, repair and replacement and eligible minor home repair fees. RHA seeks to cooperate with local Workforce Education and Training (WET) programs when possible.

1.5. ESA Studies and Pilots

1.5.1 ESA Program Studies

2025 Low Income Needs Assessment (LINA) Study

In July 2024, SDG&E continued to work on the data requested for the study.

Low Income Non-Energy Impacts Study

A public workshop was held on July 8, 2024, to present the draft study work plan. The work plan was also posted on the PDA for comment, and comments were accepted through July

22, 2024. Following the workshop and comment period, the study team compiled the comments received during the workshop and on the PDA along with the study team responses to the comments. This document was also posted on the PDA.

1.5.2 ESA Program Pilots

SDG&E is not currently conducting any ESA Program pilots in addition to the Pilot Plus/Deep covered in Section 1.1.1.

2. CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) EXECUTIVE 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.³³ The CARE Program currently provides a 20% discount on natural gas charges and a 30 – 35% discount on electric rates.³⁴ To qualify for the CARE Program, eligible customers must have a total household gross income no greater than 200% of the FPG.

2.1. CARE Program Summary

2.1.1. Please provide CARE Program summary costs.

CARE Table 2.1.1 CARE Program Summary Costs for 2024			
CARE Budget Categories	2024 Authorized Budget³⁵	Actual Expenses Year-to-Date	% of Budget Spent
Outreach	\$3,365,197	\$1,378,613	41%
Processing, Certification and	\$635,541	\$1,122,986	177%
Post Enrollment Verification	\$493,699	\$70,163	14%

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

³⁴ 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.”

³⁵ D.21-06-015 approved the CARE program budget for PYs 2021-2026.

Information Tech./Programming	\$1,138,000	\$179,078	16%
CHANGES Program	\$265,000	\$137,538	52%
Studies and Pilots	\$0	\$0	0%
Measurement and Evaluation	\$19,535	\$0	0%
Regulatory Compliance	\$327,798	\$137,772	42%
General Administration	\$694,575	\$252,822	36%
CPUC Energy Division Staff	\$74,023	\$185	0%
Total Expenses	\$7,013,368	\$3,279,157	47%
Subsidies and Benefits	\$235,468,332	\$120,824,544	51%
Total Program Costs and Discounts	\$242,481,700	\$124,103,701	51%

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

CARE Table 2.1.2 CARE Program Enrollment		
Participants Enrolled	Eligible Participants³⁶	Enrollment Rate
319,269	289,930	110%

2.2. CARE Marketing & 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 8,083 completed CARE applications and 5,973 new enrollments for the program. This month, data sharing efforts between SoCalGas and SDG&E resulted in 13 CARE enrollments. Additionally, two

³⁶ On January 8, 2024, PG&E, on behalf of the IOUs, filed a Request for Extension of Time to Comply with the Requirement to submit the Annual CARE and FERA Eligibility Report by February 12 in OP 189 of D.21-06-015. In the extension request, PG&E confirmed that the IOUs would apply the new estimates starting in the March 2024 monthly report. This number reflects estimates of SDG&E’s CARE Estimated Eligible Participants for 2024.

enrollments came through the Grid Alternatives DAC-SASH program this month. Below is a summary of CARE-specific marketing and outreach efforts for this month.

Direct Marketing

Direct Mail

SDG&E continued the monthly CARE bill comparison letters, sending 2,363 direct mail letters to CARE-eligible customers without an email address on file.

Email

SDG&E also continued the bill comparison nurture campaign, sending 37,973 emails to low income customers garnering a 50.7% open rate and a 3.9% CTR. Customers who do not open the first email may receive up to two follow-up emails.

Online Advertising

In July 2024, SDG&E continued the 2024 awareness campaign featuring updated CARE ads. The streaming audio component achieved 217,352 impressions. Digital display ads generated over 1.8 million impressions with a 0.29% CTR, while paid social search efforts yielded nearly 266,307 impressions and 120 customers clicking through to the application. Video ads garnered almost 645k impressions with a 0.08% CTR.

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

See Section 1.2.1 above for SDG&E's Tribal Outreach activity.

CARE Partners (Capitation Agencies)

SDG&E partners with 23 social service agencies such as 211 San Diego, Chaldean Community Council, refugee assimilation organizations, Women’s Infant & Children Organization (WIC) program, 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. In July, Bonita Family Resource Center (BFRC) was added as a capitation partner. BFRC is a Community Based Organization (CBO) in the San Diego South Bay Area that focuses on helping underserved families and youth to reach their maximum potential geared toward a healthier lifestyle with access to healthcare, health education, information and available resources. The following numbers were generated by the Capitation Agencies this month:

Capitation Agencies	
ESA Leads	302
CARE Enrollments	195
CARE Recertification	76
FERA Enrollments	1
FERA Recertifications	0

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 and FERA. 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:	YTD³⁷
ESA Leads	0	0
CARE Enrollments	70	559
CARE Recertifications	20	274
FERA Enrollments	1	7
FERA Recertifications	0	0

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

Customers who are enrolled in ESA and LIHEAP that have provided income verification and qualify for CARE are also automatically enrolled in the CARE Program.

CARE Table 2.2.2 CARE Automatic Enrollment for 2024		
Source	July 2024	YTD
ESA	73	437
LIHEAP	7	377 ³⁸

³⁷ Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

³⁸ In its 2023 Annual Report, SDG&E reported ongoing assessment of a potential issue surrounding LIHEAP auto-enrollment. Based on the results, SDG&E will determine whether an amendment to the Report(s) is necessary. See Annual Report of San Diego Gas & Electric Company on Energy Savings Assistance, California Alternate Rates for Energy, and Family Electric Rate Assistance Programs for 2023 (May 1, 2024) at CARE Tables 2, 3, 3B, 5, 6, and 8. As of this monthly Report, SDG&E has identified the total LIHEAP auto-enrollments for 2024 YTD as stated in CARE Table 2.2.2 above.

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

2.4. CARE Pilots and Studies

2.4.1. CARE Program Studies

2025 Low Income Needs Assessment (LINA) Study

See section 1.5.1.

CHANGES Evaluation

The study team met twice during July 2024 to discuss what to include in the work scope for this evaluation. A follow-up meeting is scheduled for August 13, 2024 to discuss a draft work scope.

2.4.2. CARE Program Pilots

Currently, there are no CARE pilots to report.

2.5.1 CARE Program PEV Freezes³⁹

On January 23, 2024, Governor Newsom declared a State of Emergency due to the flooding caused by the rainstorms in San Diego and Ventura County. On February 4, 2024, the Governor issued an additional emergency proclamation due to another rainstorm. Pursuant to OP 2 of D.19-07-015, SDG&E implemented emergency customer protections and submitted the Tier 1 Information-only Advice Letter 4379-E/3279-G on February 7, 2024, as required.

CARE Table 2.5.1 CARE Program Post-Enrollment Verification Freezes			
Date of Proclamation⁴⁰	Disaster Name	Affected Areas or ZIP Codes	Date when Protection Ends⁴¹
01/23/2024 02/04/2024	Winter Storms	92113, 92115, 91977, 92102, 92114, 91950, 91911, 92069, 92019, 92105, 92020, 91945, 92116, 91978, 92139, 92103, 92173, 92007, 91941, 92083, 91942, 92126, 92104, 91910, 92021, 92111, 92117, 92024, 92071, 91932, 92118, 92054, 92107, 91913, 92120, 92129, 92040, 92010, 92109, 92154, 92110, 92056, 92025, 92122, 92078, 92028, 92108	02/04/2025

³⁹ Resolution M-4833 directed the IOUs to freeze CARE program post-enrollment verification (PEV) in the counties impacted by the California wildfires. D.19-07-015 established a permanent set of emergency disaster customer protection measures that the utilities are mandated to implement in the event of a declared emergency. D.19-07-015 directed SDG&E’s Emergency Consumer Protections Plan to include residential and non-residential customers in areas where a state of emergency proclamation is issued by the California Governor’s Office or the President of the United States where the disaster has either resulted in the loss or disruption of the delivery or receipt of utility service, and/or resulted in the degradation of the quality of utility service.

⁴⁰ SDG&E notes that it inadvertently, and incorrectly, noted the date of proclamation as January 22, 2024, in its January 2024 Report. Instead, the proclamation was issued by Governor Newsom on January 23, 2024.

⁴¹ Pursuant to D.19-07-015, the mandated customer protections shall remain in effect from the date of the Governor of California’s state of emergency declaration or a Presidential state of emergency declaration and shall conclude no sooner than twelve (12) months from the date of the original emergency declaration, or as appropriately determined by the Governor’s Office of Emergency Services.

2.5.2 CARE Fixed Income

CARE Fixed Income		
	July 2024	YTD
New CARE Fixed Income Households	386	2,781

3. FERA EXECUTIVE 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. 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 D.21-06-015, the Commission authorized the FERA Program to be consolidated with the low income proceeding.⁴² 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.⁴³

For 2024, the Commission set SDG&E’s FERA enrollment goal at 60%, a 10% increase from 2023’s enrollment goal of 50%. SDG&E intends to continue developing more strategic marketing and outreach initiatives in an effort to increase FERA participation in 2024. Any new marketing and outreach initiatives are mentioned under section 3.2.1.

⁴² OP 26 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.”

⁴³ OP 35 of D.21-06-015 states, “San Diego Gas & Electric Company must track all Family Electric Rate Assistance (FERA) related costs in a separate FERA balancing account.”

3.1. FERA Program Summary

3.1.1. Please provide FERA Program summary costs.

FERA Table 3.1.1 FERA Program Summary Costs for 2024			
FERA Budget Categories	Authorized Budget⁴⁴	Actual Expenses to Date	% of Budget Spent
Outreach	\$368,338	\$98,721	27%
Processing, Certification and Post Enrollment Verification	\$13,925	\$14,453	104%
Information Tech./Programming	\$1,018	\$7,436	730%
Pilots	\$54,636	\$8,176	15%
Studies	\$0	\$0	0%
Regulatory Compliance	\$50,000	\$0	0%
General Administration	\$47,180	\$17,127	36%
CPUC Energy Division Staff	\$75,915	\$45,531	60%
	\$10,803	\$23	0%
Total Expenses	\$621,815	\$191,467	31%
Subsidies and Benefits	\$4,481,107	\$1,985,993	44%
Total Program Costs and Discounts	\$5,102,922	\$2,177,460	43%

3.1.2. Provide the FERA Program enrollment rate to date.

FERA Table 3.1.2 FERA Enrollment		
Participants Enrolled	Eligible Participants⁴⁵	Enrollment Rate
9,670	41,374	23%

⁴⁴ D.21-06-015 approved the FERA program budget for PYs 2021-2026.

⁴⁵ On January 8, 2024, PG&E, on behalf of the IOUs, filed a Request for Extension of Time to Comply with the Requirement to submit the Annual CARE and FERA Eligibility Report by February 12 in OP 189 of D.21-06-015. In the extension request, PG&E confirmed that the IOUs would apply the new estimates starting in the March 2024 monthly report. This number reflects estimates of SDG&E's FERA Estimated Eligible Participants for 2024.

3.2. FERA Program Marketing & Outreach

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

Marketing and outreach efforts this month contributed to 1,017 completed FERA applications and 873 new enrollments for the program. Leveraging efforts through the Grid Alternatives DAC-SASH program resulted in one FERA enrollment this month. Additionally, FERA automatic enrollments resulted in one LIHEAP and six ESA enrollments. Below is a summary of FERA-specific outreach efforts.

Direct Marketing

Direct Mail

In July 2024, SDG&E continued the monthly FERA bill comparison letters, sending 753 direct mail letters to FERA-eligible customers that don't have an email address on file.

Email

In July 2024, SDG&E sent 8,122 FERA bill comparison emails, which garnered a 52% open rate and a 3.3% click-through rate.

Organic Social

SDG&E utilized organic social media to promote FERA on SDG&E's Facebook, Instagram, and Nextdoor channels.

	Impressions	Engagements	Engagement Rate
Facebook	661	10	1.5%
Instagram	401	17	4.2%
Nextdoor	34,359	5	N/A ⁴⁶

⁴⁶ Nextdoor does not allow business accounts to enable comments.

Paid Digital Advertising

In July 2024, SDG&E initiated the 2024 FERA campaign featuring updated FERA creative ads. The streaming audio component achieved 33,102 impressions. Digital display ads generated over 408k impressions with a 2.2% CTR, while paid social media efforts yielded 333,020 impressions and 0.58% CTR. Video ads had fewer impressions at 30,928, with a CTR of 0.12%.

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 promoted in all outreach activities including events, presentations, social media messaging and training. SDG&E is exploring additional opportunities to promote FERA solely through targeted social media campaigns utilizing its Energy Solutions Partner Network.

Tribal Outreach

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 CARE recertification efforts, with the nature of the complaints and resolution.

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

3.4. Pilots and Studies

3.4.1. FERA Program Studies

There are no FERA studies at this time.

3.4.2. FERA Program Pilot

Currently, there are no FERA Pilot programs to report.

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

ESA Program Summary Expenses

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

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

Leveraging Program Expenses

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

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

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

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

ESA Program - Table 2C - Pilot Plus and Pilot Deep Program Expenses & Energy

Savings by Measures Installed

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

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

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

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

ESA Program - Table 6 - Expenditures for Pilots and Studies

ESA Program – Table 7 – Customer Segment Participation/Enrollments

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

ESA Program – Table 9 – Tribal Outreach

CARE Program - Table 1 - CARE Overall Program Expenses

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

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 - Disadvantage 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 Enrollment Rate

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 - Expenses Summary
San Diego Gas & Electric Company**

July 2024

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) [1]			\$ 18,876,805	\$ 615,629	\$ 1,207,022	\$ 1,822,651	\$ 3,707,364	\$ 6,795,902	\$ 10,503,266			56%
ESA Multifamily Whole Building [1],[2]			\$ 9,014,088	\$ 130,139	\$ 92,564	\$ 222,703	\$ 816,222	\$ 746,871	\$ 1,563,093			17%
ESA Pilot Plus and Pilot Deep [1]			\$ 1,526,683	\$ 63,367	\$ 63,367	\$ 126,735	\$ 113,744	\$ 113,743	\$ 227,467			15%
Building Electrification Retrofit Pilot												
Clean Energy Homes New Construction Pilot												
CSD Leveraging												
MCE Pilot												
SPOC			\$ 477,376	\$ 11,926	\$ 11,926	\$ 23,852	\$ 68,456	\$ 68,456	\$ 136,912			29%
SASH/MASH Unspent Funds [3]			\$ 315,260	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
ESA Program TOTAL			\$ 30,210,212	\$ 821,061	\$ 1,374,879	\$ 2,195,941	\$ 4,705,786	\$ 7,724,972	\$ 12,430,758			41%

[1] Authorized Budget per D.21-06-015, Attachment 1, Table 11. For ESA Main, an additional \$2,154,503 in unspent committed contracted funds from 2023 is available for program year 2024. In addition, unspent funds from previous program years of \$2,824,866 and \$5,106,755 for the Pilot and MFWB programs, respectively, are available to carry forward, as directed in OP 181 of the Decision.

[2] MFWB program budget includes MF In-Unit, CAM/ WB, and Implementer administrative budget categories.

[3] 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)." SDG&E filed Advice Letter 4285-E for disposal of unspent funds from the SASH and MASH programs to the ESA Program on October 31, 2023. The AL was approved on November 30, 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 1 - ESA Main (SF, MH) Expenses
San Diego Gas & Electric Company
July 2024**

Appliances ESA Program:	Authorized Budget [1]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency												
Appliances			\$ 1,284,884	\$ 96,007	\$ (3,243)	\$ 92,764	\$ 690,163	\$ 98,846	\$ 789,009			
Domestic Hot Water			\$ 1,660,178	\$ 8,806	\$ 284,712	\$ 293,518	\$ 46,419	\$ 1,500,883	\$ 1,547,302			
Enclosure			\$ 4,034,649	\$ 49,105	\$ 65,092	\$ 114,197	\$ 392,582	\$ 520,400	\$ 912,982			
HVAC			\$ 2,474,189	\$ 27,831	\$ 579,878	\$ 607,709	\$ 62,958	\$ 2,802,522	\$ 2,865,480			
Maintenance			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Lighting			\$ 1,243,299	\$ 30,528	\$ -	\$ 30,528	\$ 202,289	\$ -	\$ 202,289			
Miscellaneous			\$ 455,946	\$ 122,789	\$ -	\$ 122,789	\$ 439,700	\$ -	\$ 439,700			
Customer Enrollment			\$ 1,583,434	\$ 98,723	\$ 98,723	\$ 197,446	\$ 764,616	\$ 764,616	\$ 1,529,232			
In Home Education			\$ 868,930	\$ (3,627)	\$ (3,627)	\$ (7,254)	\$ 48,016	\$ 48,016	\$ 96,032			
Pilot			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Implementer Compensation			\$ 570,957	\$ 23,637	\$ 23,637	\$ 47,274	\$ 227,620	\$ 227,620	\$ 455,240			
Safety - Unexpected overhead costs			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Energy Efficiency TOTAL			\$ 14,176,465	\$ 453,779	\$ 1,045,172	\$ 1,498,951	\$ 2,874,363	\$ 5,962,903	\$ 8,837,266			62%
Training Center			\$ 248,304	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Workforce Education and Training			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Inspections			\$ 103,744	\$ 6,988	\$ 6,988	\$ 13,976	\$ 46,402	\$ 46,401	\$ 92,803			89%
Marketing and Outreach			\$ 1,587,362	\$ 88,596	\$ 88,596	\$ 177,192	\$ 276,454	\$ 276,454	\$ 552,908			35%
Studies			\$ 50,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Regulatory Compliance			\$ 295,630	\$ 9,020	\$ 9,020	\$ 18,040	\$ 59,461	\$ 59,461	\$ 118,922			40%
General Administration			\$ 2,358,952	\$ 57,246	\$ 57,246	\$ 114,492	\$ 450,803	\$ 450,802	\$ 901,205			38%
CPUC Energy Division			\$ 56,348	\$ -	\$ -	\$ -	\$ 81	\$ 81	\$ 162			0%
SPOC [2]			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
TOTAL PROGRAM COSTS			\$ 18,876,805	\$ 615,629	\$ 1,207,022	\$ 1,822,651	\$ 3,707,364	\$ 6,795,902	\$ 10,503,266			56%
Funded Outside of ESA Program Budget												
Indirect Costs [3]				\$ 54,307	\$ 58,561	\$ 112,868	\$ 357,164	\$ 379,370	\$ 736,534			
NGAT Costs [3]					\$ 29,851	\$ 29,851		\$ 119,365	\$ 119,365			
ESA Program Administrative Expenses^[4]												
Administrative Cap				\$ 48,134	\$ 48,134	\$ 96,268	\$ 403,265	\$ 403,265	\$ 806,530			
Total Program Costs				\$ 615,629	\$ 1,207,022	\$ 1,822,651	\$ 3,707,364	\$ 6,795,902	\$ 10,503,266			
% of Administrative Spend						5.28%			7.86%			

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

[2] The SPOC budget is reflected separately in the ESA Summary table.

[3] Includes indirect and NGAT costs for SPOC, MFWB, and Pilot Plus & Pilot Deep.

[4] Pursuant to D.21-06-015 OP 112, Pacific Gas and Electric Company, Southern California Edison Company, Southern California Gas Company and San Diego Gas & Electric Company's Energy Savings Assistance (ESA) program administrative expenses are capped at either 10 percent of total program costs, or the Utility's historical five-year average spend on administrative costs as a percentage of total program costs, whichever is greater. The use of the historical five-year average spend will be phased out such that the Utilities must propose to spend no more than 10 percent of total program costs on administrative costs starting in program year 2024. The definition and categorization of administrative costs for the ESA program will be consistent with that of the main energy efficiency program.

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

**Energy Savings Assistance Program Table 2 - Main (SF, MH) Summary
San Diego Gas & Electric Company
July 2024**

Measures	Basic	Plus	Units	ESA Main Program (Summary) Total					
				Year-To-Date Completed & Expensed Installation					
				Quantity Installed	kWh [1] (Annual)	kW [1] (Annual)	Therms [1] (Annual)	Expenses (\$) [2]	% of Expenditure
Appliances									
High Efficiency Clothes Washer			Each	96	3,952	1	992	98,549	2.0%
Refrigerator			Each	409	220,079	-	-	520,159	10.4%
Clothes Dryer			Each	96	(19)	-	210	118,382	2.4%
Dishwasher			Each	-	-	-	-	-	0.0%
Freezers			Each	-	-	-	-	-	0.0%
Domestic Hot Water									
Faucet Aerator			Each	-	-	-	-	-	0.0%
Other Domestic Hot Water			Home	1,360	12,193	2	13,338	144,004	2.9%
Water Heater Tank and Pipe Insulation			Home	77	-	-	711	9,307	0.2%
Water Heater Repair/Replacement			Home	105	-	-	-	334,035	6.6%
Low-Flow Showerhead			Home	-	-	-	-	-	0.0%
Combined Showerhead / TSV			Each	11	-	-	104	919	0.0%
Heat Pump Water Heater - Electric			Each	-	-	-	-	-	0.0%
Heat Pump Water Heater - Gas			Each	-	-	-	-	-	0.0%
Heat Pump Water Heater - Propane			Each	-	-	-	-	-	0.0%
Heat Pump Water Heater			Each	-	-	-	-	-	0.0%
Thermostatic Tub Spout/Diverter			Each	-	-	-	-	-	0.0%
Thermostatic Shower Valve			Each	-	-	-	-	-	0.0%
Thermostatic Shower Valve Combined Showerhead			Each	-	-	-	-	-	0.0%
Solar Water Heating			Home	-	-	-	-	-	0.0%
Enclosure									
Air Sealing			Home	1,467	70,824	15	(2,622)	751,998	15.0%
Caulking			Home	-	-	-	-	-	0.0%
Diagnostic Air Sealing			Home	-	-	-	-	-	0.0%
Attic Insulation			Home	59	4	0	1	73,506	1.5%
Attic Insulation CAC NonElect Heat			Home	-	-	-	-	-	0.0%
Floor Insulation			Home	-	-	-	-	-	0.0%
HVAC									
Removed - FAU Standing Pilot Conversion			Each	-	-	-	-	-	0.0%
Furnace Repair/Replacement			Each	340	-	-	-	815,144	16.2%
Room A/C Replacement			Each	22	3,756	3	-	25,248	0.5%
Central A/C replacement			Each	-	-	-	-	-	0.0%
Heat Pump Replacement			Each	-	-	-	-	-	0.0%
Heat Pump Replacement - CAC Gas			Each	-	-	-	-	-	0.0%
Heat Pump Replacement - CAC Propane			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%
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	156	700	-	177	41,733	0.8%
Portable A/C			Each	-	-	-	-	-	0.0%
Central Heat Pump-FS (propane or gas space)			Home	-	-	-	-	-	0.0%
Wholehouse Fan			Each	-	-	-	-	-	0.0%
Maintenance									
Furnace Clean and Tune			Home	-	-	-	-	-	0.0%
Removed - Central A/C Tune up			Home	-	-	-	-	-	0.0%
Condenser Coil Cleaning			Each	-	-	-	-	-	0.0%
Fan Control Adjust			Each	-	-	-	-	-	0.0%
Refrigerant Charge Adjustment			Each	-	-	-	-	-	0.0%
Evaporator Coil			Each	-	-	-	-	-	0.0%
HVAC Air Filter Service			Each	-	-	-	-	-	0.0%
Evaporative Cooler - Maint Functioning			Each	-	-	-	-	-	0.0%
Evaporative Cooler - Maint Non-Functioning			Each	-	-	-	-	-	0.0%
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 Torchiere			Each	-	-	-	-	-	0.0%
Removed - Occupancy Sensor			Each	-	-	-	-	-	0.0%
Removed - LED Night Light			Each	-	-	-	-	-	0.0%
LED Reflector Bulbs			Each	1,840	30,765	4	(701)	31,924	0.6%
LED A-Lamps			Each	13,489	82,690	10	(1,847)	159,440	3.2%
Miscellaneous									
Pool Pumps			Each	-	-	-	-	-	0.0%
Power Strip			Each	276	38,640	6	-	16,414	0.3%
Power Strip Tier II			Each	376	71,442	1	(0)	31,441	0.6%
Air Purifier			Home	684	-	-	-	380,215	7.6%
Cold Storage			Each	-	-	-	-	-	0.0%
Comprehensive Home Health and Safety Check-up			Home	-	-	-	-	-	0.0%
CO and Smoke Alarm			Each	-	-	-	-	-	0.0%
Pilots									
Customer Enrollment									
ESA Outreach & Assessment			Home	3,807	-	-	-	\$ 1,362,385	27.1%
ESA In-Home Energy Education			Home	3,807	-	-	-	\$ 109,223	2.2%
Total Savings/Expenditures					535,025	41	10,365	5,024,025	
Total Households Weatherized [3]			1,490						
Households Treated									
			Total						
- Single Family Households Treated			Home	2,735					
- Mobile Homes Treated			Home	233					
Total Number of Households Treated			Home	2,968					
# Eligible Households to be Treated for PY [8]			Home	3,983					
% of Households Treated			%	74.52%					
- Master-Meter Households Treated			Home	82					

ESA Program - Main	Year to Date Expenses[4]		
	Electric	Gas	Total
Administration [5]	\$ 833,001	\$ 832,999	\$ 1,666,000
Direct Implementation (Non-Incentive) [6]	\$ 227,620	\$ 227,620	\$ 455,240
Direct Implementation [7]	\$ 2,646,743	\$ 5,735,283	\$ 8,382,026
TOTAL ESA Main COSTS	\$ 3,707,364	\$ 6,795,902	\$ 10,503,266

<<Includes measures costs

[1] All savings are calculated based on the following sources: DNV/GL Impact Evaluation Program Years 2015-2017 Impact II, or ESA workpapers.
 [2] The total expenditures presented in this table exclude accrual activity.
 [3] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, and minor home repairs.
 [4] Total ESA Main YTD expenses are reported in ESA Table 1.
 [5] Administrative includes expenses from Training Center, Inspections, Marketing and Outreach, Studies, Regulatory Compliance, General Administrative, and CPUC Energy Division categories.
 [6] Direct Implementation (Non-Incentive) includes expenses from Implementation category.
 [7] Direct Implementation includes expenses from Appliances, Domestic Hot Water, Enclosure, HVAC, Lighting, Miscellaneous, Customer Enrollment, and In-Home Education.
 [8] Forecasted homes treated goal includes single family and mobile homes under the Main ESA Program.

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

Energy Savings Assistance Program Table 2A - Multifamily Whole Building
San Diego Gas & Electric Company
July 2024

Table 2A ESA Program - Multifamily Whole Building ¹									
Year-To-Date Completed & Expensed Installation									
	Units (of Measure such as "each")	Measure Type (In-unit vs Common Area) ²	Quantity Installed	Number of Units for Cap-kBTU and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$) ⁴	% of Expenditure
Measures									
Appliances									
High Efficiency Clothes Washer	Each	In-Unit							0.00%
Refrigerator	Each	In-Unit	5		2,715	0	-	\$ 6,418.49	3.66%
	-								0.00%
Domestic Hot Water									
New Non-Condensing Domestic Hot Water Boiler	Cap-kBTU	CAMWB							0.00%
New Condensing Domestic Hot Water Boiler	Cap-kBTU	CAMWB							0.00%
Storage Water Heater	Cap-kBTU	CAMWB							0.00%
Tankless Water Heater	Cap-kBTU	CAMWB							0.00%
Heat Pump Water Heater	kW	CAMWB							0.00%
Demand Control DHW Recirculation Pump	Each	CAMWB							0.00%
Low flow Showerhead	Each	In-Unit	349		128	0	1,819	\$ 9,475.35	5.40%
Faucet Aerator	Each	In-Unit	271		-	-	1,420	\$ 2,300.80	1.31%
Thermostatic Tub Spout/Diverter	Each	In-Unit							0.00%
Thermostatic Shower Valve	Each	In-Unit	3		67	0	6	\$ 115.41	0.07%
Water Heater Tank and Pipe Insulation	Household	In-Unit							0.00%
Water Heater Repair/Replacement	Household	In-Unit							0.00%
Heat Pump Water Heater	Each	In-Unit							0.00%
Hot Water Pipe Insulation	Each	CAMWB							0.00%
Boiler Controls	Each	CAMWB							0.00%
									0.00%
Envelope									
Attic Insulation	Sq Ft	CAMWB							0.00%
Wall Insulation Blow-in	Sq Ft	CAMWB							0.00%
Windows	Sq Ft	CAMWB							0.00%
Window Film	Sq Ft	CAMWB							0.00%
Air Sealing	Household	In-Unit	59		-	-	-	\$ 1,395.94	0.80%
Attic Insulation	Household	In-Unit							0.00%
									0.00%
HVAC									
Air Conditioners Split System	Cap-Tons	CAMWB							0.00%
Heat Pump Split System	Cap-Tons	CAMWB							0.00%
New Packaged Air Conditioner	Cap-Tons	CAMWB							0.00%
Package Terminal A/C	Cap-Tons	CAMWB							0.00%
Package Terminal Heat Pump	Cap-Tons	CAMWB							0.00%
Furnace Replacement	Cap-kBTU	CAMWB							0.00%
Space Heating Boiler	Cap-kBTU	CAMWB							0.00%
Smart Thermostats	Each	In-Unit	10		0	0	0	\$ 1,993.10	1.14%
Furnace Repair/Replacement	Each	In-Unit							0.00%
Central A/C Replacement	Each	In-Unit							0.00%
High Efficiency Forced Air Unit (HE FAU)	Each	In-Unit							0.00%
Portable A/C	Each	In-Unit							0.00%
Central A/C Tune up	Each	In-Unit							0.00%
Blower Motor Retrofit	Each	CAMWB							0.00%
Efficient Fan Controller	Each	CAMWB							0.00%
									0.00%
Lighting									
Interior LED Lighting	Each	In-Unit	49		779	0.08624	(15)	\$ 408.26	0.23%
Interior TLED Type A Lamps	Each	In-Unit	1188		6,903	0.7709	(132)	\$ 9,712.93	5.54%
Interior TLED Type C Lamps	Each	CAMWB							0.00%
New LED T8 Lamp - Interior	Each	CAMWB							0.00%
New LED T8 Lamp - Exterior	Each	CAMWB							0.00%
Interior LED Fixture	Each	CAMWB							0.00%
Interior LED Screw-in	Each	CAMWB							0.00%
Interior LED Exit Sign	Each	CAMWB							0.00%
Exterior LED Lighting	Each	CAMWB							0.00%
New LED Parking Garage Fixtures	Each	CAMWB							0.00%
LED Exterior Wall or Pole Mounted Fixture	Each	CAMWB							0.00%
LED Corn Lamp for Exterior Wall or Pole Mounted	Each	CAMWB							0.00%
Exterior LED Lighting - Pool	Each	CAMWB							0.00%
Wall or Ceiling Mounted Occupancy Sensor	Each	CAMWB							0.00%
LED Diffuse A-Lamps	Each	In-Unit							0.00%
LED Reflector Bulbs	Each	In-Unit							0.00%
									0.00%
Miscellaneous									
Tier-2 Smart Power Strip	Each	In-Unit	29		5,481	0	(0)	\$ 1,760	1.00%
Variable Speed Pool Pump	Each	CAMWB							0.00%
Smart Power Strip Tier II	Each	CAMWB							0.00%
Cold Storage	Each	In-Unit							0.00%
Air Purifier	Home	In-Unit							0.00%
CO and Smoke Alarm	Each	In-Unit							0.00%
CO and Smoke Alarm	Each	CAMWB							0.00%
Minor Repair	Each	In-Unit	731		0	0	0	\$21,852.48	12.48%
									0.00%
Electrification									
New - Central Heat Pump-FS (propane or gas space)	Each	In-Unit							0.00%
Heat Pump Clothes Dryer - FS	Each	In-Unit							0.00%
Induction Cooktop - FS	Each	In-Unit							0.00%
Ductless Mini-split Heat Pump - FS	Each	In-Unit							0.00%
Heat Pump Water Heater - FS	Each	In-Unit							0.00%
Heat Pump Pool Heater - FS	Each	CAMWB							0.00%
Ductless Mini Split - FS	Each	CAMWB							0.00%
Heat Pump Water Heater - FS	Each	CAMWB							0.00%
Customer Enrollment - In Unit									
	Household	In-Unit							
ESA Outreach & Assessment			524					\$ 103,406	58.98%
ESA In-Home Energy Education	Household	In-Unit	524					\$ 16,480	9.40%
Ancillary Services									
Audit ⁵									0.00%
Total	-		3,740	-	16,073	1	3,098	\$ 175,319	100.00%

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated ¹	0
Subtotal of Master-metered Multifamily Properties Treated	0
Total Number of Multifamily Tenant Units w/in Properties Treated ²	0
Total Number of buildings w/in Properties Treated	0

Multifamily Properties Treated (In-Unit)	Number
Total Number of households individually treated (in-unit)	523

ESA Program - MFWB	Year to Date Expenses		
	Electric	Gas	Total
Administration ³	\$ 351,159	\$ 381,158	\$ 762,317
Direct Implementation (Non-Incentive)	\$ 349,949	\$ 349,949	\$ 699,898
Direct Implementation	\$ 85,114	\$ 15,764	\$ 100,878
SPOC	\$ 68,456	\$ 68,456	\$ 136,912
TOTAL MFWB COSTS	\$ 854,678	\$ 815,327	\$ 1,700,005

[1] Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings.
[2] Multifamily tenant units are the number of dwelling units located within properties treated. This number does not represent the same number of dwellings treated as captured in table 2A.
[3] Commissioning costs, as allowable per the Decision, are included in measures total cost unless otherwise noted.
[4] Applicable to Demand-Responsive, government and non-profit owned multi-family buildings described in D.16-11-022, modified by D.17-12-009, where 65% of tenants are income eligible based (at or below 250% of the Federal Poverty Guidelines).
[5] Measure type column added to identify if a measure is for in-unit or common area/whole building because they use different paperwork savings.
[6] The total expenditures presented in this table exclude accrual activity.
[7] Year to date Administration expense total includes \$53,800 related to the ongoing ESA CAM NMEC study.
NOTE: Audit costs may be covered by other programs or projects may utilize previous audits. Not all participants will have an audit cost associated with their project.
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 2B - Pilot Plus and Pilot Deep
San Diego Gas & Electric Company
July 2024

Measures ^[2]	Units	ESA Program - Pilot Plus						ESA Program - Pilot Deep							
		Year-To-Date Completed & Expensed Installation ^[1]						Year-To-Date Completed & Expensed Installation ^[1]							
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$) ^[2]	% of Expenditure	Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$) ^[2]	% of Expenditure		
Appliances															
Efficient Electric Dryer	Each	-	-	-	-	\$ -	0.0%	0	Each	-	-	-	-	\$ -	0.0%
Heat Pump Dryer	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
High Efficiency Clothes Washers	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Induction Cooktop/Range	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Pool Pump Retrocommissioning (RCx)	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Pool Pump Replacement	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Refrigerator	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Standard Electric Range	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Tier 2 Adv Power Strip w Bluetooth	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water															
Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Heat Pump Water Heater - Fuel Sub	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Heat Pump Water Heater - Fuel Sub (120V)	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Low Flow Faucet Aerator	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Low Flow Showerhead	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Storage Water Heater	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Tankless On-Demand	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Thermostat-controlled Shower Valve	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Tub Diverter/ Tub Spout	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Water Heater Blanket	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Water Heater Pipe Insulation	Len. Ft	-	-	-	-	\$ -	0.0%		Len. Ft	-	-	-	-	\$ -	0.0%
Enclosure															
Attic Insulation	Sq. ft	-	-	-	-	\$ -	0.0%		Sq. ft	-	-	-	-	\$ -	0.0%
Diagnostic Air Sealing	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
Exterior Wall Insulation	Sq.ft	-	-	-	-	\$ -	0.0%		Sq.ft	-	-	-	-	\$ -	0.0%
Floor Insulation	Sq.ft	-	-	-	-	\$ -	0.0%		Sq.ft	-	-	-	-	\$ -	0.0%
HVAC															
Central Air Conditioner (A/C)	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Fan Controller for A/C	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Portable A/C	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
High Efficiency Furnace	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Diagnostic Duct Sealing	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Duct Replacement	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Duct Sealing with Equipment Upgrade	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Ducted Heat Pump	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Ducted Heat Pump - Fuel Substitution	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Ductless Heat Pump	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Ductless Heat Pump - Fuel Substitution	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Smart Thermostat	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Whole House Fan	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Packaged HVAC	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Maintenance															
Minor Home Repair	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
Lighting															
A-Lamp LED	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Reflector Lamp LED	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Miscellaneous															
Cold Storage	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Air Purifier	Each	-	-	-	-	\$ -	0.0%		Each	-	-	-	-	\$ -	0.0%
Customer Enrollment															
ESA Outreach & Assessment	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
ESA In-Home Energy Education	Home	-	-	-	-	\$ -	0.0%		Home	-	-	-	-	\$ -	0.0%
Total Savings/Expenditures						\$ -	0.0%							\$ -	0.0%
Households Treated															
		Total							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 ^[4]	\$ 60,134	\$ 60,133	\$ 120,267
Direct Implementation (Non-Incentive) ^[5]	\$ 53,610	\$ 53,610	\$ 107,220
Direct Implementation ^[6]			\$ -
TOTAL Pilot Plus and Pilot Deep COSTS	\$ 113,744	\$ 113,743	\$ 227,487

ESA Program - Pilot Plus and Pilot Deep	Year to Date Expenses ^[6]		
	Electric	Gas	Total
Inspections	\$ -	\$ -	\$ -
Marketing and Outreach	\$ 576	\$ 576	\$ 1,152
General Administration	\$ 59,558	\$ 59,557	\$ 119,115
Direct Implementer -- ADMIN	\$ 53,610	\$ 53,610	\$ 107,220
EM&V Studies	\$ -	\$ -	\$ -
Direct Installation -- Materials	\$ -	\$ -	\$ -
Performance Incentive	\$ -	\$ -	\$ -
Home Audit: Test-In Test-Out	\$ -	\$ -	\$ -
Remediation & Mitigation	\$ -	\$ -	\$ -
WE&T	\$ -	\$ -	\$ -

[1] "Completed and Expensed Installation" project savings and expenses will be reported when projects have been fully closed (i.e. inspected, issues resolved, permits closed as applicable) and reported by Pilot Implementer to SDG&E. All measures and savings from a project will be reported as either Pilot Plus or Pilot Deep. Savings from a single project will not span both tables.

[2] The measure list for SDG&E Pilot Plus and Deep is unique to the pilot and differs from Main ESA.

[3] The total expenditures presented in this table exclude accrual activity.

[4] Administration includes expenses from the following categories: General Administration, Regulatory Compliance, Training, Inspections, Marketing and Outreach, and Evaluation.

[5] Direct Implementation (Non-Incentive) includes expenses for Implementer Administration.

[6] Direct Implementation includes expenses for measures delivery.

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 2C - Building Electrification Retrofit Pilot
Southern California Edison
July 2024

Measures	Units	ESA Program - Building Electrification Retrofit Pilot					
		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							
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	Home	

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

<<Includes measures costs

Energy Savings Assistance Program Table 2D - Clean Energy Homes New Construction Pilot
 Southern California Edison
 July 2024

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	-	-	\$ -	0.0%
* 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	-	-	\$ -	0.0%
Multifamily Properties	Each	-	-	\$ -	0.0%
* Buildings	Each	-	-	\$ -	0.0%
* No. of Dwelling Units	Each	-	-	\$ -	0.0%
Home	Home	-	-	\$ -	0.0%
Home	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

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

**Energy Savings Assistance Program Table 2E - CSD Leveraging
San Diego Gas & Electric Company
July 2024**

Measures	Basic	Plus	ESA Program - CSD Leveraging						
			Units	Year-To-Date Completed & Expensed Installation					
				Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances									
High Efficiency Clothes Washer			Each	-	-	-	-	-	-
Refrigerator			Each	-	-	-	-	-	-
New - Clothes Dryer			Each	-	-	-	-	-	-
New - Dishwasher			Each	-	-	-	-	-	-
Freezers			Each	-	-	-	-	-	-
Domestic Hot Water									
Faucet Aerator			Home	-	-	-	-	-	-
Water Heater Tank and Pipe Insulation			Home	-	-	-	-	-	-
Water Heater Repair/Replacement			Each	-	-	-	-	-	-
Low-Flow Showerhead / Combined Showerhead/TSV			Home	-	-	-	-	-	-
Heat Pump Water Heater			Each	-	-	-	-	-	-
Thermostatic Tub Spout/Diverter			Home	-	-	-	-	-	-
Thermostatic Shower Valve			Home	-	-	-	-	-	-
New - Solar Water Heating			Each	-	-	-	-	-	-
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 A/C 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)			Each	-	-	-	-	-	-
New - Wholehouse Fan			Each	-	-	-	-	-	-
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	3807	Total
Administration	\$ -	\$ -	\$ -
Direct Implementation (Non-Incentive)	\$ -	\$ -	\$ -
Direct Implementation	\$ -	\$ -	\$ -
TOTAL CSD Leveraging COSTS	\$ -	\$ -	\$ -

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

**Energy Savings Assistance Program Tables 3A-3H - Energy Savings and Average Bill Savings per Treated Home/Common Area
San Diego Gas & Electric Company
July 2024**

Table 3A, ESA Program (SF, MH)	
Annual kWh Savings	535,025
Annual Therm Savings	10,365
Lifecycle kWh Savings	5,534,413
Lifecycle Therm Savings	103,705
Current kWh Rate	\$0.25
Current Therm Rate	\$1.69
Average 1st Year Bill Savings / Treated households	\$38.89
Average Lifecycle Bill Savings / Treated Household	\$400.80

Table 3B, ESA Program - Multifamily Whole Building (MF In-Unit) [4]	
Annual kWh Savings	16,073
Annual Therm Savings	3,098
Lifecycle kWh Savings	144,412
Lifecycle Therm Savings	25,898
Current kWh Rate	\$0.25
Current Therm Rate	\$1.69
Average 1st Year Bill Savings / Treated Property	\$17.77
Average Lifecycle Bill Savings / Treated Property	\$153.45

Table 3C, ESA Program - Multifamily Whole Building (MFCAM)	
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 [2]	
Annual kWh Savings	-
Annual Therm Savings	-
Lifecycle kWh Savings	-
Lifecycle Therm Savings	-
Current kWh Rate	\$0.00
Current Therm Rate	\$0.00
Average 1st Year Bill Savings / Treated Property	\$0.00
Average Lifecycle Bill Savings / Treated Property	\$0.00

Table 3E, ESA Program - Pilot Deep [2]	
Annual kWh Savings	-
Annual Therm Savings	-
Lifecycle kWh Savings	-
Lifecycle Therm Savings	-
Current kWh Rate	\$0.00
Current Therm Rate	\$0.00
Average 1st Year Bill Savings / Treated Property	\$0.00
Average Lifecycle Bill Savings / Treated Property	\$0.00

Table 3F, ESA Program - Building Electrification (SCE Only)	
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), MFWB, CSD Leveraging, Pilot Plus and Pilot Deep [3]	
Annual kWh Savings	551,098
Annual Therm Savings	13,462
Lifecycle kWh Savings	5,678,825
Lifecycle Therm Savings	129,604
Current kWh Rate	\$ 0.51
Current Therm Rate	\$ 3.38
Average 1st Year Bill Savings / Treated Households	\$ 56.67
Average Lifecycle Bill Savings / Treated Households	\$ 554.24

[1] Data reported in this table is cumulative since program inception.

[2] ESA Pilot Plus and Pilot Deep uses the same formulas to calculate values as Main ESA, but the variables such as measure savings and expected useful life may differ. The pilot will initially estimate energy savings with energy modeling software.

[3] Summary is the sum of ESA Main, MFWB and Pilot Plus Pilot Deep.

[4] Separating MFWB in-unit savings summary from the CAM and Whole Building measures savings because they are calculated using different residential rates.

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 Company
July 2024**

Table 4A, ESA Program (SF, MH)						
	Eligible Households [2]			Households Treated YTD		
County	Rural [1]	Urban	Total	Rural	Urban	Total
Orange	0	21,308	21,308	0	1	1
San Diego	8,986	355,023	364,009	91	2,876	2,967
Total	8,986	376,331	385,317	91	2,877	2,968

Table 4B, ESA Program - MF CAM						
	Eligible Households [2]			Households Treated YTD		
County	Rural [1]	Urban	Total	Rural	Urban	Total
Orange	N/A	N/A	N/A	0	0	0
San Diego	N/A	N/A	N/A	0	0	0
Total	0	0	0	0	0	0

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Table 4C, ESA Program - MFWB (MF In-Unit)						
	Eligible Properties			Properties Treated YTD		
County	Rural [1]	Urban	Total	Rural	Urban	Total
Orange	N/A	N/A	N/A	0	0	0
San Diego	N/A	N/A	N/A	0	523	523
Total	0	0	0	0	523	523

Table 4D, ESA Program - Multifamily Whole Building (MFCAM, MF MFWB)						
	Eligible Households			Households Treated YTD		
	Rural [1]	Urban	Total	Rural	Urban	Total
Orange	N/A	N/A	N/A	0	0	-
San Diego	N/A	N/A	N/A	0	-	0
Total	0	0	0	0	0	0

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

Table 4F, ESA Program - CSD Leveraging						
	Eligible Households[4]			Households Treated YTD		
	-	-	-	-	-	-
Total					0	0

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

[2] Eligibility Estimates are from PY2023 and include SF, MH, MF In-Unit. PY2024 eligibility estimates will be provided by Athens Research later this year.

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 5A - 5E - Energy Savings Assistance Program Customer Summary
San Diego Gas & Electric Company
July 2024**

Table 5A, ESA Program (SF, MH)																
Month	Gas & Electric					Gas Only			Electric Only				Total			
	# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
February	390	1,264	67,572	5	-	-	-	-	21	-	2,678	0	411	1,264	70,251	5
March	390	938	51,163	3	-	-	-	-	14	-	6,559	1	404	938	57,723	3
April	592	2,374	107,863	8	-	-	-	-	37	-	9,125	1	629	2,374	115,988	9
May	355	1,386	69,637	5	-	-	-	-	21	-	5,377	0	376	1,386	75,014	5
June	625	2,115	102,678	9	-	-	-	-	35	-	8,695	1	660	2,115	111,373	10
July	456	2,288	93,953	7	-	-	-	-	32	-	10,724	1	488	2,288	104,678	9
August																
September																
October [4]																
November																
December																
YTD	2,808	10,365	492,867	37	-	-	-	-	160	-	42,169	4	2,968	10,365	635,025	41

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month in Table 2.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Table 5B, ESA Program - MFWB In-Unit																
Month	Gas & Electric				Gas Only			Electric Only				Total				
	# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
April	73	447	2,761	0	-	-	-	-	4	-	543	0	77	447	3,304	0
May	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
June	13	140	2,457	0.03	-	-	-	-	-	-	-	-	13	140	2,457	0
July	363	2,500	7,842	0.59	-	-	-	-	70	10.82	2,471	0.28	433	2,511	10,312	1
August																
September																
October																
November																
December																
YTD	449	3,087	13,059	1	-	-	-	-	74	11	3,014	0	523	3,098	16,073	1

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month in Table 2A.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Table 5C, ESA Program - Multifamily Whole Building (MF In-unit, MFCAM)																
Month	Gas & Electric				Gas Only			Electric Only				Total				
	# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
April	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
May	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
August																
September																
October																
November																
December																
YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Table 5D, ESA Program - Pilot Plus and Pilot Deep																
Month	Gas & Electric				Gas Only [1]			Electric Only [1]				Total				
	# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
April	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
May	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
August																
September																
October																
November																
December																
YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Table 5E, ESA Program - Building Electrification (SCE Only)																
Month	Gas & Electric				Gas Only			Electric Only				Total				
	# of Household Treated by Month	1490			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
April	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
May	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
August	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
September	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
October	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

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

[1] SDG&E is treating dual-fuel (gas and electric) customers through ESA Pilot Plus and Deep.
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 Company
July 2024

	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															
Virtual Energy Coach															
ESA Pilot Plus and Pilot Deep [1]			\$ 7,633,415	\$ 63,367	\$ 63,367	\$ 126,735	\$ 113,744	\$ 113,743	\$ 227,487	\$ 227,994	\$ 227,993	\$ 455,987			6%
Total Pilots	\$ -	\$ -	\$ 7,633,415	\$ 63,367	\$ 63,367	\$ 126,735	\$ 113,744	\$ 113,743	\$ 227,487	\$ 227,994	\$ 227,993	\$ 455,987			6%
Pilot Evaluations (SCE)															
ESA Pilot Plus/Deep Program Pilot Evaluation															
Building Electrification Retrofit Pilot Evaluation															
Clean Energy Homes New Construction Pilot Evaluation															
Total Pilot Evaluations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Studies [2]															
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study [2]	\$ -	\$ -	\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 18,725	\$ 18,725	\$ 37,450			100%
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]	\$ -	\$ -	\$ 11,250	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,584	\$ 5,584	\$ 11,168			99%
Load Impact Evaluation Study [1]	\$ -	\$ -	\$ 225,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Equity Criteria and Non Energy Benefits Evaluation (NEB's) [1]	\$ -	\$ -	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Evolving Study and Data Needs [1]	\$ -	\$ -	\$ 300,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 37,813	\$ 37,813	\$ 75,626			25%
Joint IOU - Process Evaluation Studies (1-4 Studies) [1]	\$ -	\$ -	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Total Studies	\$ -	\$ -	\$ 798,750	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 62,122	\$ 62,122	\$ 124,244			16%

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

[2] 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.

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

Energy Savings Assistance Program Table 7 - Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions *
San Diego Gas & Electric Company
July 2024

Customer Segments	# of Households Eligible [1]	# of Households Treated [2]	Enrollment Rate = (C/B)	# of Households Contacted [3]	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures) [4]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only) [5]	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures) [4]	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only) [5]	Avg. Cost Per Treated Households
Demographic											
Housing Type											
SF	170,522	2,735	2%	3,583	76%	114.62	117.69	0.01	2.53	2.61	\$ 913
MH	22,466	233	1%	438	53%	(2.91)	(5.24)	(0.02)	(5.03)	(5.38)	\$ 1,289
Rent vs. Own											
Own	196,885	1,064	1%	15,558	7%	116.96	123.75	0.01	2.17	2.31	\$ 1,281
Rent	236,613	1,904	1%	34,076	6%	87.54	87.32	0.01	1.81	1.81	\$ 613
Previous vs. New Participant											
New	N/A	1,978	0%	45,819	4%	100.69	104.42	0.01	2.18	2.28	\$ 993
Previous [19]	13,760	990	7%	50,169	2%	110.05	110.81	0.01	1.54	1.57	\$ 914
Seniors [6]	166,246	825	0%	N/A	0%	104.03	108.54	0.01	1.76	1.84	\$ 1,149
Veterans	44,771	25	0%	N/A	0%	140.01	146.32	0.01	2.69	2.86	\$ 1,095
Hard-to-Reach [7]	N/A	1,986	0%	N/A	0%	84.98	86.33	0.00	1.45	1.49	\$ 892
Vulnerable [8]	160,975	904	1%	20,449	4%	82.08	82.61	0.01	1.94	1.97	\$ 884
Location											
DAC	90,092	592	1%	12,098	5%	84.04	84.89	0.01	2.03	2.06	\$ 884
Rural	8,611	91	1%	2,151	4%	113.21	116.09	0.01	0.52	0.55	\$ 975
Tribal [18]	21,716	2	0%	156	1%	183.21	183.21	0.00	-	-	\$ 589
PSFS Zone	131,968	25	0%	1,380	2%	91.29	88.17	0.00	(0.02)	(0.02)	\$ 710
Wildfire Zone [9]	83,552	189	0%	9,060	2%	129.19	131.55	0.01	1.14	1.19	\$ 911
Climate Zone 6	16,775	1	0%	2,867	0%	531.23	531.23	0.01	-	-	\$ 1,592
Climate Zone 7	244,028	1,951	1%	67,044	3%	99.62	102.97	0.01	2.32	2.40	\$ 977
Climate Zone 8	4,649	-	0%	846	0%	-	-	-	-	-	\$ -
Climate Zone 10	99,636	1,006	1%	27,680	4%	109.53	111.65	0.01	1.38	1.44	\$ 959
Climate Zone 14	3,490	8	0%	546	1%	138.23	138.23	0.01	-	-	\$ 850
Climate Zone 15	1,084	2	0%	125	2%	166.70	166.70	0.00	2.46	2.46	\$ 627
CARB Communities [10]	293,478	397	0%	8,553	5%	81.50	83.13	0.01	2.10	2.14	\$ 845
Financial											
CARE	289,316	2,727	1%	93,487	3%	106.44	109.20	0.01	2.17	2.24	\$ 962
FERA	43,709	44	0%	3,638	1%	74.02	78.14	0.01	1.49	1.57	\$ 830
Disconnected [11]	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A
Arrearages [12]	144,053	1,191	1%	31,974	4%	93.27	92.75	0.01	1.87	1.87	\$ 739
High Usage [13]	52,414	182	0%	3,429	5%	144.68	147.05	0.01	1.86	1.90	\$ 888
High Energy Burden [14]	132,033	647	0%	12,011	5%	90.80	92.15	0.01	2.20	2.26	\$ 863
SEVI [15]											
H	275,414	419	0%	22,610	2%	141.94	147.02	0.01	1.78	1.86	\$ 1,022
M	318,131	913	0%	36,696	2%	110.06	113.80	0.01	1.97	2.05	\$ 1,062
L	243,149	1,629	1%	39,444	4%	89.42	91.41	0.01	2.10	2.16	\$ 905
Affordability Ratio [16]	35,421	290	1%	8,213	4%	86.01	87.39	0.01	2.69	2.73	\$ 857
Health Condition											
Medical Baseline	20,925	240	1%	5,166	5%	111.71	116.03	0.01	2.02	2.10	\$ 1,138
Respiratory (Asthma) [17]											
Low	283,333	950	0%	43,884	2%	118.38	123.14	0.01	1.94	2.04	\$ 1,034
Medium	195,497	1,035	1%	31,560	3%	104.50	106.27	0.01	1.82	1.87	\$ 915
High	113,025	978	1%	23,306	4%	88.07	90.57	0.01	2.26	2.33	\$ 965
Disabled	115,807	205	0%	N/A	0%	119.54	123.89	0.01	1.94	2.04	\$ 1,181

[1] SDG&E is reporting on these customer segments at the direction of the ED with the caveat that estimates/numbers may be compiled from multiple sources, based on available estimates, and/or self-reported data. The numbers may not be additive.
[2] 2023 eligibility estimates provided by Athens Research, except as otherwise noted.
[3] Households treated data is not additive because customers may be represented in multiple categories. Data is compiled based on ESA measures received YTD, and may include enrollments from prior years
[4] The number of household contacted includes YTD leads and enrollments.
[5] SDG&E has considered the energy savings associated with all ESA measures installed for this entry, regardless of whether the savings have a negative or positive value for kW, kWh, and/or Therms. Many measures offered in ESA provide Non-Energy Benefits (including Health, Comfort, and Safety (HCS)) in addition to energy savings, and some of these measures may be associated with a negative savings value.
[6] SDG&E has considered only the energy savings associated with the ESA measures installed for this entry that have a positive value for kWh and/or Therms. Installed ESA measures with a negative savings value for both kWh and Therms were excluded.
[7] This represents the number of households with at least one member who is at least 62 years old at the time of data collection.
[8] "Hard-to-reach" residential customers include those customers who do not have easy access to program information or generally do not participate in energy efficiency programs due to a language, income, housing type, geographic, or home ownership (split incentives) barrier (Advice Letter 4482-G6314-E dated September 1, 2021). For the purpose of this reporting, SDG&E is defining "hard-to-reach" as those residential customer self-identified as not preferring or speaking English as the primary language because income, housing type, geographic, and homeownership information is reported elsewhere on this table.
[9] Vulnerable refers to Disadvantaged Vulnerable Communities (DVC) which consist consists of communities in the 25% highest scoring census tracts according to the most current versions of the California Communities Environmental Health Screening Tool (CalEnviroScreen), as well as all California tribal lands, census tracts that score in the highest 5% of Pollution Burden within CalEnviroScreen, but do not receive an overall CalEnviroScreen score due to unreliable public health and socioeconomic data, and census tracts with median household incomes less than 60% of state median income.
[10] Includes Tier 2 and 3 of the CPUC Fire-Threat Map
[11] This reflects communities within SDG&E's service territory that are identified by the California Air Resources Board (CARB) Community Air Protection Program as communities continue to experience environmental and health inequities from air pollution.
[12] SDG&E resumed disconnections for residential customers in 2023. Late notices have been issued to CARE and FERA customers but no CARE or FERA customers have been disconnected thus far.
[13] SDG&E defines arrearages as overdue balance greater than 30 days. Estimated eligibility is based on CARE/FERA households with arrearages in the prior year as reported in SDG&E's R-18-07-005 Monthly Disconnection Report through December 2023.
[14] SDG&E defines high usage as at least 400% of baseline at least three times in 12-month period.
[15] SDG&E utilizes the Low-Income Energy Affordability Data (LEAD) Tool developed by DOE's Office of Energy Efficiency & Renewable Energy to identify census tracts with high energy burden for households at below 200 % Federal Poverty Level (FPL) that are in SDG&E's service territory. The 2016 Needs Assessment for the Energy Savings Assistance and the California Alternate Rates for Energy Programs describes households that spent more 6.3% of their annual income on energy bills as having high energy burden (p.47).
[16] The Socioeconomic Vulnerability Index (SEVI) metric represents the relative socioeconomic standing of census tracts, referred to as communities, in terms of poverty, unemployment, educational attainment, linguistic isolation, and percentage of income spent on housing. SDG&E utilizes the SEVI data provided by the CPUC to map its service territory by SEVI scores (L: 0 to 33; M: >33 to 66; H: >66).
[17] The Affordability Ratio (AR) metric quantifies the percentage of a representative household's income that would be used to pay for an essential utility service after non-discretionary expenses such as housing and other essential utility service charges are deducted from the household's income. Using Gas AR20 and Electric AR20 data for 2023 (using 2019 base year) provided by the CPUC, SDG&E selects census tracts with Electric AR20 at above 15% or Gas AR20 above 10% to identify areas within its service territory as having high affordability ratio (CPUC 2019 Annual Affordability Report, pp 34, 44).
[18] SDG&E utilizes the 'Asthmas' indicator in CalEnviroScreen 4.0 (published by the California Office of Environmental Health Hazard Assessment) as a proxy to identify locations with varying levels of respiratory conditions within its service territory. L: 0-33 percentile; M: >33-66 percentile; L: >66-100 percentile.
[19] This data captures tribal households located on federally-recognized tribes whose trust lands are identified in the Bureau of Indian Affairs, and also includes ESA participants from non federally-recognized tribes or households that self-identified as Native American.

[19] YTD, cost and energy savings for this customer segment includes a significant portion of in-progress projects, as well as projects with higher cost measures, which may skew the average savings and cost (Columns G-L) higher than the averages for the reported completed projects in Column B.
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 8 - Clean Energy Referral, Leveraging, and Coordination
San Diego Gas & Electric Company
July 2024

Partner	Brief Description of Effort	# of Referral ¹	# of Leveraging ²	# of Coordination Efforts ³	# of Leads ⁴	# of Enrollments ⁵
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 ⁸	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	35	0
SDCWA	SDG&E efforts to coordinate program information with SDCWA.	0	0	0	0	N/A
CARE/Medical Baseline	CARE Online Enrollments are leveraged for ESA Program Enrollments.	N/A	N/A	N/A	N/A	N/A
CARE High Usage	Leads generated through CARE HEU income verifications completed	N/A	N/A	N/A	344	164
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	18	43	30	9
CARE Capitation Agencies	SDG&E partners with 22 social service agencies to help enroll its hardest-to-reach customers in Customer Assistance programs.	N/A	8	3	1,632	46
Demand Response - AC Saver ⁶	Eligible residential customers who own a qualifying Wi-Fi enabled smart thermostat may enroll. During an "energy event," SDG&E will notify the smart thermostat provider to temporarily adjust the temperature setting on the thermostat up to four degrees to limit A/C usage. Participating customers may qualify for an SDG&E incentive.	N/A	0	0	156	0
MFWB ⁷	Coordination with SDG&E in their Administration of the Southern Section MFWB program	6	1	10	0	0

1 Number of outbound referrals being given to the partner.

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

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

4 Number of inbound Leads or Referrals from the Partner

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

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

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

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

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 Company
July 2024**

OUTREACH STATUS	Quantity (Includes CARE, FERA, and ESA) [2]	List of Participating Tribes
Tribes completed ESA Meet & Confer [1]	9	Barona Band of Mission Indians, Pauma Band of Mission Indians, La Posta Band of Mission Indians, Mesa Grande Band of Mission Indians, Manzanita Band of Kumeyaay Nation, Campo Kumeyaay Nation, Iipay Nation of Santa Ysabel, La Jolla Band of Luiseno Indians, Los Coyotes Band of Cahuilla and Cupeno Indians
Tribes requested outreach materials or applications	8	Pauma Band of Mission Indians, La Posta Band of Mission Indians, Mesa Grande Band of Mission Indians, Iipay Nation Santa Ysabel, Campo Kumeyaay Nation, Manzanita Band of Kumeyaay Nation, La Jolla Band of Luiseno Indians, Los Coyotes Band of Cahuilla and Cupeno Indians
Tribes who have not accepted offer to Meet and Confer	3	Ewiaapaayp, Inaja Cosmit Band of Indians [3], Pala Band of Mission Indians, Rincon Band of Luiseno Indians
Non-Federally Recognized Tribes who participated in Meet & Confer	0	
Tribes and Housing Authority sites involved in Focused Project/ESA	N/A	N/A
Partnership offer on Tribal Lands	6	Iipay Nation of Santa Ysabel, La Jolla Band of Luiseno Indians, La Posta Band of Mission Indians, Campo Kumeyaay Nation, Los Coyotes Band of Cahuilla and Cupeno Indians, Southern Indian Health Council
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	2	Southern California American Indian Resource Center (SCAIR); Southern California Tribal Chairmen's Association (SCTCA) [4]
Housing Authority and TANF offices who participated in Meet and Confer	N/A	N/A

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

[2] Numbers are a rolling count of Tribal Outreach efforts

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

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

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

CARE Program Table 1 - Program Expenses
San Diego Gas & Electric Company
July 2024

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	\$ 2,995,025	\$ 370,172	\$ 3,365,197	\$ 42,843	\$ 4,361	\$ 47,204	\$ 1,246,356	\$ 132,257	\$ 1,378,613	42%	36%	41%
Processing / Certification Re-certification	\$ 565,631	\$ 69,910	\$ 635,541	\$ 152,079	\$ 15,041	\$ 167,120	\$ 1,021,917	\$ 101,069	\$ 1,122,986	181%	145%	177%
Post Enrollment Verification	\$ 439,392	\$ 54,307	\$ 493,699	\$ 10,886	\$ 1,077	\$ 11,963	\$ 63,848	\$ 6,315	\$ 70,163	15%	12%	14%
IT Programming	\$ 1,012,820	\$ 125,180	\$ 1,138,000	\$ 23,080	\$ 2,283	\$ 22,755	\$ 162,961	\$ 16,117	\$ 179,078	16%	13%	16%
CHANGES Program	\$ 235,850	\$ 29,150	\$ 265,000	\$ 20,707	\$ 2,048	\$ 22,755	\$ 125,160	\$ 12,378	\$ 137,538	53%	42%	52%
Studies and Pilots	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Measurement and Evaluation	\$ 17,386	\$ 2,149	\$ 19,535	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance	\$ 291,740	\$ 36,058	\$ 327,798	\$ 23,057	\$ 2,280	\$ 25,337	\$ 125,373	\$ 12,399	\$ 137,772	43%	34%	42%
General Administration	\$ 618,172	\$ 76,403	\$ 694,575	\$ 37,594	\$ 3,718	\$ 41,312	\$ 230,068	\$ 22,754	\$ 252,822	37%	30%	36%
CPUC Energy Division	\$ 65,880	\$ 8,143	\$ 74,023	\$ -	\$ -	\$ -	\$ 168	\$ 17	\$ 185	0%	0%	0%
SUBTOTAL MANAGEMENT COSTS	\$ 6,241,896	\$ 771,472	\$ 7,013,368	\$ 310,246	\$ 30,808	\$ 341,054	\$ 2,975,851	\$ 303,306	\$ 3,279,157	48%	39%	47%
CARE Rate Discount [2]	\$ 214,084,954	\$ 21,383,378	\$ 235,468,332	\$ 17,976,679	\$ 1,123,350	\$ 19,100,029	\$ 106,874,983	\$ 13,949,561	\$ 120,824,544	50%	65%	51%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 220,326,850	\$ 22,154,850	\$ 242,481,700	\$ 18,286,925	\$ 1,154,158	\$ 19,441,083	\$ 109,850,834	\$ 14,252,867	\$ 124,103,701	50%	64%	51%
Other CARE Rate Benefits												
- Wildfire Non-Bypassable Charge Exemption [3]				\$ 680,439		\$ 680,439	\$ 4,132,078		\$ 4,132,078			
- CARE Surcharge Exemption				\$ 1,747,868	\$ 169,134	\$ 1,917,002	\$ 10,664,525	\$ 2,017,150	\$ 12,681,675			
- kWh Surcharge Exemption				\$ 63,792		\$ 63,792	\$ 418,612		\$ 418,612			
- Vehicle Grid Integration Exemption				\$ -		\$ -	\$ 43,863		\$ 43,863			
Total Other CARE Rate Benefits				\$ 2,492,100	\$ 169,134	\$ 2,661,234	\$ 15,259,079	\$ 2,017,150	\$ 17,276,229			
Indirect Costs				\$ 88,635	\$ 8,766	\$ 97,401	\$ 578,747	\$ 57,239				

[1] Authorized Budget for PY 2024 in D.21-06-015, Attachment 1, Table 2.

[2] CARE Rate Discount amounts reflected in Advice Letters 4291-E and 3245-G, effective January 1, 2024.

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

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

CARE Program Table 2 - Enrollment, Recertification, & Attrition
San Diego Gas & Electric Company
July 2024

	New Enrollment								Recertification					Attrition (Drop Offs)					Enrollment		Total CARE Participants	Estimated CARE Eligible ¹	Enrollment Rate % (Wx) ²	Total Residential Accounts ³	Gas Only	Electric Only			
	Inter-Utility ⁴	Intra-Utility ⁴	Leveraging ⁵	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (E+C+D)	Total New Enrollment (E+N)	Scheduled	Non-Scheduled [6]	Automatic	Total Recertification (L+M+N)	No Response ⁷	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)							Net Adjusted (K-T)		
January	15	62	2	82	6,227	370	439	178	7,214	7,296	5,989	3,281	838	10,108	3,764	7	575	2,624	6,970	17,404	329	337,145	269,930	116%	1,387,876	0	139,878		
February	21	63	4	88	5,079	415	459	139	6,092	6,180	4,376	2,608	989	7,972	3,941	7	424	2,674	7,346	14,152	-1,166	335,079	269,930	116%	1,392,568	0	139,777		
March	39	68	1	102	5,360	448	509	144	6,461	6,563	3,350	3,018	1,527	9,893	4,220	28	560	2,358	7,151	16,464	-68	335,391	269,930	116%	1,398,327	0	139,819		
April	19	70	253	352	4,203	350	298	149	4,960	5,342	6,183	2,363	775	9,461	4,547	27	533	2,490	7,587	14,803	-2,255	333,136	269,930	115%	1,403,115	0	139,029		
May	0	89	103	192	4,677	278	292	119	5,364	5,656	5,328	2,643	1,094	9,095	5,223	24	563	3,989	9,889	14,671	-4,413	329,723	269,930	113%	1,408,323	0	137,464		
June	25	5	3	33	4,534	307	384	148	5,373	5,690	6,830	2,270	884	10,044	4,373	22	718	4,771	9,884	15,460	-4,476	324,245	269,930	112%	1,413,600	0	136,922		
July	13	73	7	93	4,745	412	504	219	5,880	5,973	5,384	2,393	698	9,045	6,494	22	595	3,838	10,349	15,018	-4,976	319,269	269,930	110%	1,419,439	0	133,967		
August																													
September																													
October																													
November																													
December																													
YTD Total	128	437	377	842	34,825	2,688	2,888	1,896	41,374	42,316	39,440	19,344	6,804	65,888	32,862	135	3,848	22,921	69,866	187,804	-17,680	319,269	289,930	116%	1,418,439	0	133,967		

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 15, 2024, PG&E, on behalf of the IOUs, submitted the Annual CARE and FERA Eligibility Report in accordance with CP 189 of D 21-05-015. This number reflects estimates of SDG&E's CARE Estimated Eligible Participants for 2024.
⁸ Recertification 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 Program Table 3A - Post-Enrollment Verification Results (Model)
San Diego Gas & Electric Company
July 2024

Month	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response) ¹	CARE Households De-enrolled (Verified as Ineligible)	Total Households De-enrolled	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-enrolled
January	337,145	2,105	0.6%	1,199	21	1,220	58.0%	58.0%
February	335,979	2,104	0.6%	1,243	26	1,269	60.3%	60.3%
March	335,391	2,149	0.6%	1,314	26	1,340	62.4%	62.4%
April	333,136	2,664	0.8%	1,316	24	1,340	50.3%	50.3%
May	328,723	2,227	0.7%	108	17	125	5.6%	5.6%
June	324,245	2,218	0.7%	8	16	24	1.1%	1.1%
July	319,269	3,199	1.0%	3	14	17	0.5%	0.5%
August								
September								
October								
November								
December								
YTD Total	319,269	16,666	5.2%	5,191	144	5,335	32.0%	1.7%

¹ Post enrollment verification (PEV) results are tied to the month initiated and the PEV process allows customers 90 days to respond to the PEV request. Results may be pending due to the time permitted for a participant to respond.

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

CARE Program Table 3B Post-Enrollment Verification Results (Electric only High Usage)
San Diego Gas & Electric Company
July 2024

Month	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response) ¹	CARE Households De-enrolled (Verified as Ineligible)	Total Households De-enrolled	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-enrolled
January	337,145	246	0.1%	139	2	141	57.3%	0.0%
February	335,979	272	0.1%	201	1	202	74.3%	0.1%
March	335,391	332	0.1%	229	3	232	69.9%	0.1%
April	333,136	259	0.1%	169	3	172	66.4%	0.1%
May	328,723	289	0.1%	165	7	172	59.5%	0.1%
June	324,245	243	0.1%	1	2	3	1.2%	0.0%
July	319,269	727	0.2%	0	3	3	0.4%	0.0%
August								
September								
October								
November								
December								
YTD Total	319,269	2,368	0.7%	904	21	925	39.1%	0.3%

¹ Post enrollment verification (PEV) results are tied to the month initiated and the PEV process allows customers 90 days to respond to the PEV request. Results may be pending due to the time permitted for a participant to respond.

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

**CARE Program Table 4 - Enrollment by County
San Diego Gas & Electric Company
July 2024**

County	Estimated Eligible Households ¹			Total Households Enrolled ²			Enrollment Rate ³		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Orange	18,596	0	18,596	15,218	0	15,218	82%	0%	82%
San Diego	263,877	7,457	271,334	297,071	6,980	304,051	113%	94%	112%
Total	282,473	7,457	289,930	312,289	6,980	319,269	111%	94%	110%

¹ On April 15, 2024, PG&E, on behalf of the IOUs, submitted the Annual CARE and FERA Eligibility Report in accordance with OP 189 of D.21-06-015. This number reflects estimates of SDG&E's CARE Estimated Eligible Participants for 2024.

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 Program Table 5 - Recertification Results
San Diego Gas & Electric Company
July 2024**

Month	Total CARE Households	Households Requested to Recertify ³	% of Households Total (C/B)	Households Recertified ¹	Households De-enrolled ²	Recertification Rate % (E/C)	% of Total Households De-enrolled (F/B)
January	337,145	11,507	3.4%	4,522	6,037	39.3%	0.1%
February	335,979	11,703	3.5%	5,045	5,539	43.1%	1.6%
March	335,391	12,099	3.6%	5,945	4,932	49.1%	1.5%
April	333,136	13,103	3.9%	6,817	4,116	52.0%	1.2%
May	328,723	11,232	3.4%	5,162	609	46.0%	0.2%
June	324,245	11,420	3.5%	3,471	417	30.4%	0.1%
July	319,269	10,321	3.2%	2,532	295	24.5%	0.1%
August							
September							
October							
November							
December							
YTD	319,269	81,385	25.5%	33,494	21,945	41.2%	6.9%

¹ Recertification results are tied to the month initiated and the recertification process allows customers 120 days to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.

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

³ Excludes count of customers recertified through the probability model.

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

CARE Program Table 6 - Capitation Contractors¹
San Diego Gas & Electric Company
July 2024

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
211 SAN DIEGO		X			169	918
ALPHA MINI MART	X				17	36
AMERICAN RED CROSS WIC OFFICES		X	X		-	-
BACKCOUNTRY COMMUNITIES THRIVING	X	X			-	-
BONITA FAMILY RESOURCE CENTER		X			-	-
CAMPESINOS UNIDOS INC (CUI) - CARE		X	X	X	-	30
CHALDEAN COMMUNITY COUNCIL		X	X		1	24
CHULA VISTA COMMUNITY COLLABORATIVE		X			1	8
COMMUNITY RESOURCE CENTER		X			-	-
ELDERHELP OF SAN DIEGO		X			-	-
HEARTS AND HANDS WORKING TOGETHER		X			-	-
INTERFAITH COMMUNITY SERVICES		X			-	-
LA MAESTRA FAMILY CLINIC		X			6	24
NEIGHBORHOOD HEALTH CARE		X			-	2
NORTH COUNTY HEALTH PROJECT, INC.	X				-	-
ORANGE COUNTY UNITED WAY (211 OC)		X			-	-
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	-
SAN YSIDRO HEALTH CENTERS		X			-	6
SCRIPPS HEALTH WIC		X			-	3
SOMALI BANTU ASSOCIATION OF AMERICA		X			-	-
SOMALI FAMILY SERVICES		X			-	-
UNION OF PAN ASIAN COMMUNITIES		X	X		-	-
VISTA COMMUNITY CLINIC		X			-	2
Total Enrollments					194	1,053

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

San Diego Gas & Electric Company
CARE Program Table 7 - Expenditures for Pilots and Studies
July 2024

2024	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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 16,138	\$ 1,843	22%
Studies												
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study [2]			\$ 37,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 33,267	\$ 4,182	100%
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]			\$ 11,250	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,058	\$ 1,109	99%
Total			\$ 203,750	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 59,463	\$ 7,134	33%

[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.

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

**CARE Program Table 8 - CARE and Disadvantaged Communities Enrollment Rate for Zip Codes
San Diego Gas & Electric Company
July 2024**

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][4]
January	N/A	112%	67%	N/A
February	N/A	111%	66%	N/A
March	N/A	111%	66%	N/A
April	N/A	110%	64%	N/A
May	N/A	108%	66%	N/A
June	N/A	107%	64%	N/A
July	N/A	105%	64%	N/A
August				
September				
October				
November				
December				
	N/A	105%	64%	N/A

[1] All DAC zip codes have a CARE Enrollment Rate > 70%

[2] Disconnections resumed for residential customers in August 2023. However, no CARE customers have been disconnected to date.

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

[4] 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.

Note: 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 Program Table 8A - CARE Top 10 Lowest Enrollment Rates in High Disconnection, High Poverty, and DAC
Communities by Zip Code
San Diego Gas & Electric Company
July 2024**

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]
92122	59%
92061	60%
92066	68%
91905	69%
92101	71%
92060	75%
92086	80%
92078	87%
92058	99%
92025	100%

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in DAC
92102	111%
92113	116%
91950	120%
91910	123%
92105	125%
91945	129%
92021	139%
91911	140%
92173	142%
92114	142%

[1] Disconnections resumed for residential customers in August 2023. However, no CARE customers have been disconnected to date.

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

[3] 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.

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.

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

**FERA Program Table 1 - FERA Program Expenses
San Diego Gas & Electric Company
July 2024**

	Authorized Budget	Current Month Expenses	Year to Date Expenses	% of Budget Spent YTD
FERA Program:	Electric	Electric	Electric	Electric
Outreach	\$ 368,338	\$ 30,845	\$ 98,721	27%
Processing / Certification Re-certification	\$ 13,925	\$ 2,304	\$ 14,453	104%
Post Enrollment Verification	\$ 1,018	\$ 1,079	\$ 7,436	730%
IT Programming	\$ 54,636	\$ 1,247	\$ 8,176	15%
Pilot(s)	\$ -			0%
Studies	\$ 50,000			0%
Regulatory Compliance	\$ 47,180	\$ 2,553	\$ 17,127	36%
General Administration	\$ 75,915	\$ 6,409	\$ 45,531	60%
CPUC Energy Division	\$ 10,803		\$ 23	0%
SUBTOTAL MANAGEMENT COSTS [1]	\$ 621,815	\$ 44,437	\$ 191,467	31%
FERA Rate Discount [2]	\$ 4,481,107	\$ 342,247	\$ 1,985,993	44%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 5,102,922	\$ 386,684	\$ 2,177,460	43%
Indirect Costs		\$ 6,278	\$ 41,558	

[1] Authorized Budget for PY 2024 in D.21-06-015, Attachment 1, Table 4.

[2] FERA Discount budget amount reflected in Advice Letter 4291-E, effective January 1, 2024.

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

FERA Program Table 2 - Enrollment, Recertification, & Attrition
San Diego Gas & Electric Company
July 2024

	New Enrollment								Recertification							Enrollment									
	Inter-Utility ¹	Automatic Enrollment			Self-Certification (Income or Categorical)				Total New Enrollment (E+J)	Scheduled	Non-Scheduled	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)	Total FERA Participants	Estimated FERA Eligible ^{5,7}	Enrollment ⁶ Rate % (WX)		
Intra-Utility ²		Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																	
January	0	5	0	5	328	23	21	3	375	380	41	77	2	120	41	77	2	184	304	500	76	10,422	41,374	25%	
February	0	10	0	10	238	12	16	2	268	278	17	39	2	58	17	39	2	235	293	336	-15	10,220	41,374	25%	
March	0	8	0	8	287	15	19	2	323	331	31	65	6	102	31	65	6	151	253	433	78	10,034	41,374	24%	
April	0	4	0	4	232	18	7	2	259	263	38	41	4	83	38	41	4	107	190	346	73	9,775	41,374	24%	
May	0	3	0	3	238	13	15	0	266	269	30	53	2	85	30	53	2	181	266	354	3	9,373	41,374	23%	
June	0	0	0	0	419	28	18	1	466	466	38	42	2	83	39	42	2	197	290	549	186	9,259	41,374	22%	
July	0	6	1	7	844	12	9	1	866	873	50	143	2	195	50	143	2	105	300	1,068	573	9,670	41,374	23%	
August																									
September																									
October																									
November																									
December																									
YTD Total	0	36	1	37	2,586	121	105	11	2,823	2,860	246	460	20	726	246	460	20	1,160	1,886	3,586	974	9,670	41,374	23%	

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 15, 2024, PG&E, on behalf of the IOUs, submitted the Annual CARE and FERA Eligibility Report in accordance with OP 189 of D.21-06-015. This number reflects estimates of SDG&E's FERA Estimated Eligible Participant for 2024.
⁶ Presentation Rate and Enrollment Rate are the same value.
⁷ FERA Estimated Eligible population value was incorrectly reported in FERA Table 2 for the 2023 Annual Report. The 2022 population was incorrectly used causing a slight decrease in enrollment rate for the 2023 program year.
 Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

FERA Program Table 3A - Post-Enrollment Verification Results (Model)
San Diego Gas & Electric Company
July 2024

Month	Total FERA Households Enrolled	Households Requested to Verify	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response) ¹	FERA Households De-enrolled (Verified as Ineligible)	Total Households De-enrolled	% De-enrolled through Post Enrollment Verification	% of Total FERA Households De-enrolled
January	10,422	68	0.7%	49	1	50	73.5%	0.5%
February	10,220	71	0.7%	55	1	56	78.9%	0.5%
March	10,034	72	0.7%	51	0	51	70.8%	0.5%
April	9,775	92	0.9%	47	3	50	54.3%	0.5%
May	9,373	36	0.4%	4	1	5	13.9%	0.1%
June	9,259	7	0.1%	1	0	1	14.3%	0.0%
July	9,670	1	0.0%	0	0	0	0.0%	0.0%
August								
September								
October								
November								
December								
YTD Total	9,670	347	3.6%	207	6	213	61.4%	2.2%

¹ Post enrollment verification (PEV) results are tied to the month initiated and the PEV process allows customers 90 days to respond to the PEV request. Results may be pending due to the time permitted for a participant to respond.

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

FERA Program Table 3B Post-Enrollment Verification Results (Electric only High Usage)
San Diego Gas & Electric Company
July 2024

Month	Total FERA Households Enrolled	Households Requested to Verify	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response) ¹	FERA Households De-enrolled (Verified as Ineligible)	Total Households De-enrolled	% De-enrolled through Post Enrollment Verification	% of Total FERA Households De-enrolled
January	10,422	0	0.0%	0	0	0	0.0%	0.0%
February	10,220	0	0.0%	0	0	0	0.0%	0.0%
March	10,034	0	0.0%	0	0	0	0.0%	0.0%
April	9,775	0	0.0%	0	0	0	0.0%	0.0%
May	9,373	0	0.0%	0	0	0	0.0%	0.0%
June	9,259	0	0.0%	0	0	0	0.0%	0.0%
July	9,670	0	0.0%	0	0	0	0.0%	0.0%
August								
September								
October								
November								
December								
YTD Total	9,670	0	0.0%	0	0	0	0.0%	0.0%

¹ Post enrollment verification (PEV) results are tied to the month initiated and the PEV process allows customers 90 days to respond to the PEV request. Results may be pending due to the time permitted for a participant to respond.

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

**FERA Program Table 4 - Enrollment by County
San Diego Gas & Electric Company
July 2024**

County	Estimated Eligible Households ¹			Total Households Enrolled ²			Enrollment Rate ³		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Orange	2,297	0	2,297	387	0	387	17%	0%	17%
San Diego	37,734	1,343	39,077	9,072	211	9,283	24%	0%	24%
Total	40,031	1,343	41,374	9,459	211	9,670	24%	16%	23%

¹ On April 15, 2024, PG&E, on behalf of the IOUs, submitted the Annual CARE and FERA Eligibility Report in accordance with OP 189 of D.21-06-015. This number reflects estimates of SDG&E's FERA Estimated Eligible Participants for 2024.

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 Program Table 5 - Recertification Results
San Diego Gas & Electric Company
July 2024**

Month	Total FERA Households	Households Requested to Recertify ²	% of Households Total (C/B)	Households Recertified ¹	Households De-enrolled	Recertification Rate % (E/C)	% of Total Households De-enrolled (F/B)
January	10,422	754	7.2%	0	654	0.0%	6.3%
February	10,220	437	4.3%	25	350	5.7%	3.4%
March	10,034	468	4.7%	33	396	7.1%	3.9%
April	9,775	451	4.6%	48	307	10.6%	3.1%
May	9,373	442	4.7%	24	114	5.4%	1.2%
June	9,259	522	5.6%	15	84	2.9%	0.9%
July	9,670	523	5.4%	15	89	2.9%	0.92%
August							
September							
October							
November							
December							
YTD	9,670	3,597	37.2%	160	1,994	4.4%	20.6%

¹ Recertification results are tied to the month initiated and the recertification process allows customers 120 days to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.

² Excludes count of customers recertified through the probability model.

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

FERA Program Table 6 - Capitation Contractors¹
San Diego Gas & Electric Company
July 2024

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	11
ALPHA MINI MART	X				-	-
AMERICAN RED CROSS WIC OFFICES		X	X		-	-
BACKCOUNTRY COMMUNITIES THRIVING	X	X			-	-
BONITA FAMILY RESOURCE CENTER		X				
CAMPESINOS UNIDOS INC (CUI)		X	X	X	-	-
CHALDEAN COMMUNITY COUNCIL		X	X		-	-
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	-
COMMUNITY RESOURCE CENTER		X			-	-
ELDERHELP OF SAN DIEGO		X			-	-
HEARTS AND HANDS WORKING TOGETHER		X			-	-
INTERFAITH COMMUNITY SERVICES		X			-	-
LA MAESTRA FAMILY CLINIC		X			-	-
MAAC PROJECT		X		X	-	-
NEIGHBORHOOD HEALTH CARE		X			-	-
NORTH COUNTY HEALTH PROJECT, INC.	X				-	-
ORANGE COUNTY UNITED WAY (211 OC)		X			-	-
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	-
SAN YSIDRO HEALTH CENTERS		X			-	-
SCRIPPS HEALTH WIC		X			-	-
SOMALI BANTU ASSOCIATION OF AMERICA		X			-	-
SOMALI FAMILY SERVICES		X			-	-
UNION OF PAN ASIAN COMMUNITIES		X	X		-	-
VISTA COMMUNITY CLINIC		X			-	-
Total Enrollments					1	11

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.