

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



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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
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Application 19-11-006
Application 19-11-007

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

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March 21, 2024

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This is the February 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 February 29, 2024, for San Diego Gas & Electric Company (SDG&E).

Respectfully Submitted,

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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' 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 Investor-Owned Utilities (IOUs) to shift the ESA Program away from treating all eligible and willing households towards a customer-centered prioritization model based on household needs and customer profile.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 customers. To

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.

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 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 \$29,894,951.⁷ In February 2024, SDG&E's total costs for the ESA Portfolio were \$3,622,564. 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 February 2024, SDG&E presented its Measure Offerings Modification Proposal to the ESA Policies and Procedures & Installation Standards (PP/IS) Manual Sub Working Group for evaluation.⁸ The PP/IS Sub Working Group raised no concerns and the Proposal advances to the ESA Working Group in March. Additional information is provided in section 1.1.2 Program Measure Changes below.

Additionally in February 2024, SDG&E launched a six-month targeted outreach and engagement campaign aimed at 22,000 customers that will likely meet income qualifications and have high energy savings potential. SDG&E and RHA are coordinating outreach efforts to engage an initial tranche of 3,700 targeted customers over the next month.

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

⁷ D.21-06-015 at Attachment 1, Table 7.

⁸ *Id.* at OP 61 and at OP 69.

ESA Table 1.1.1.1 ESA Main (SF, MH) Program Summary Expenses for 2024			
	2024 Authorized / Planning Assumptions⁹	Actual to Date¹⁰	%
Budget ¹¹	\$18,876,805	\$3,130,376	17%
Homes Treated	3,983	236	6%
kWh Saved ¹²	1,496,098	60,986	4%
kW Demand Reduced	218	6	3%
Therms Saved	42,191	1,300	3%
GHG Emissions Reduced (Tons) ¹³	N/A	N/A	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		
	February 2024	YTD
Administrative Expenses	\$140,004	\$232,301
Total Program Costs	\$2,066,179	\$3,130,376
% of Administrative Spend	6.78%	7.42%

⁹ Authorized ESA budget, energy savings goals and household treatment target per D.21-06-015.

¹⁰ As shown in ESA Monthly Report Table 1, and Table 2.

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 ESA Main.

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

In February 2024, SDG&E’s ESA Main YTD administrative expenses are below the administrative cap at 7.42%.¹⁴

ESA MFWB

In February 2024, SDG&E’s Southern MFWB Program processed, and paid Implementer invoices related to work performed in 2023, which will be reflected in SDG&E’s Annual Report for the program year (PY) 2023. SDG&E and RHA continued to collaborate on SDG&E's PY 2024 build-out which caused a delay in invoice processing. The work performed in January and February 2024 was accrued and will be invoiced and reported in March’s monthly report.

ESA Table 1.1.1.3 below compares the authorized budget and targets for program year 2024 to actual progress to date for the MFWB program.

ESA Table 1.1.1.3 MFWB (In-Unit, CAM, WB) Summary of Expenses for 2024			
	2024 Authorized / Planning Assumptions	Actual to Date	%
Budget ¹⁵	\$9,014,088	\$398,434	4%
SPOC Budget	\$477,376	\$25,834	5%
Properties Treated	18	0	0%
Homes Treated	10,155	0	0%
kWh Saved	1,273,901	0	0%
kW Demand Reduced	N/A	0	0%
Therms Saved	73,198	0	0%
GHG Emissions Reduced (Tons)	N/A	0	0%

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.”

¹⁵ MFWB program budget includes MF In-Unit, CAM, WB, and Implementer administrative budget categories as shown on ESA Monthly Report Table 2A.

Pilot Plus/Pilot Deep (ESA Whole Home)

On January 9, 2024, SDG&E fully executed the contract for Pilot Plus/Pilot Deep program. The contract was awarded to Maroma Energy Services. SDG&E began 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. Ramp-up activities will continue through Q1 2024. SDG&E continues to meet with internal stakeholders, and Maroma Energy Services, on a weekly basis to prepare for the Pilot deployment. SDG&E expects the Pilot to be open for participation by the end of March 2024.

ESA Table 1.1.1.4 Pilot Plus and Pilot Deep Summary Expenses for 2024			
	2024 Authorized / Planning Assumptions¹⁶	Actual to Date¹⁷	%
Budget ¹⁸	\$1,526,683	\$67,920	4%
Homes Treated	N/A	0	0%
kWh Saved	N/A	0	0%
kW Demand Reduced	N/A	0	0%
Therms Saved	N/A	0	0%
GHG Emissions Reduced (Tons)	N/A	0	0%

SASH/MASH Unspent Funds

¹⁶ 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.

¹⁷ 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.

¹⁸ Pilot Plus and Pilot Deep budget and expenditures are reflected in ESA Monthly Report Table 2B.

In 2022, both the SASH and MASH programs sunset in SDG&E’s service territory. Consistent with OP 13 of D.15-01-027, any remaining unspent and unencumbered SASH/MASH program funds should be used for measures in low income energy efficiency programs in residential housing that benefit ratepayers. On October 31, 2023, SDG&E submitted AL 4285-E.¹⁹ In the AL, SDG&E requested to transfer the unspent SASH/MASH funds to the ESA programs.²⁰ The transferred funds will be used primarily to support the ESA Main program implementation across the current program cycle, including to provide energy efficiency 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 energy efficiency budget categories and other ESA programs and pilots like the MFWB Program and Pilot Plus/Pilot Deep Program.²¹ 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)²² for 2024			
	2024 Authorized/Planning Assumptions	Actual YTD	% YTD
Budget	\$315,260	0	0

¹⁹ See SDG&E AL 4285-E (October 31, 2023), *available at* https://tariff.sdge.com/tm2/pdf/submittals/ELEC_4285-E.pdf.

²⁰ 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).

²¹ D.21-06-015 OP 39, OP 123.

²² SDG&E’s AL 4285-E was disposed 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 February 2024, SDG&E presented its Measure Offerings Modification Proposal to the ESA Policies and Procedures & Installation Standards (PP/IS) Manual Sub Working Group for evaluation. SDG&E proposed the following modifications to its 2024-2026 ESA Main program measure offerings:

Measure to be Retired:

- High Efficiency Clothes Dryer (Gas)

Measures to be Added:

- Smart Fan Controller
- Lifecycle Refrigerant Management
- Brushless Fan Motor Replacement
- Energy Efficient Freezer
- Tankless Water Heater

The PP/IS Sub Working Group raised no concerns on the Proposal and approved SDG&E's request. SDG&E will present these changes to the public during the ESA Working Group meeting in March 2024.

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

In 2024, SDG&E will continue to work with RHA to address staffing shortages that impacted ESA Main customer outreach and enrollment activities in 2023. The shortages impact targeted door-to-door canvassing, calling targeted customers from generated lead lists, and

following up on program leads generated through SDG&E targeted marketing campaigns. RHA anticipates onboarding subcontractors by Q2 2024 to support outreach and engagement activities.

SDG&E launched a six-month targeted outreach and engagement campaign aimed at 22,000 customers that have been identified as likely to meet income qualifications and have high energy savings potential. SDG&E and RHA are coordinating direct marketing to 3,700 targeted customers. Lastly, in February 2024, the ESA Main Program enrolled 669 customers, which represents an increase of 2% from the previous month.

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

In February 2024, SDG&E Southern MFWB Implementer, RHA, reported ongoing robust program interest from property owners and trade allies. The Implementer 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. The Implementer reported completing 26 property enrollments, and 13 property assessments in February. This brings the total whole building enrollments to 111 properties (32 in SDG&E's service territory, 2 in SCE's service territory, 27 in SoCalGas's service territory, and 48 in SCE/SoCalGas's combined service territory, and 2 in SoCalGas's/SDG&E's combined service territory), 85 completed property assessments, and 169 completed units. Additionally, RHA continues to work on a pipeline of 784 qualified leads in the southern service territory.

ESA Pilot Plus and Pilot Deep Outreach Preparation

SDG&E expects the Pilot to be open for participation by Q1 2024, at which time marketing and outreach (ME&O) activities will be launched. In preparation for the launch,

SDG&E's ME&O teams continue to work on the Pilot website design and marketing collateral, including presentation materials for SDG&E's community-based organizations partners.

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. One customer was served by the Language Line this month.

Language	Calls
Mandarin	1
Total	1

Tribal Outreach

SDG&E's Outreach and Tribal Relations teams work together to engage with the 17 Federally recognized tribes within its service territory in an ongoing initiative to educate tribes on available customer assistance programs and determine program eligibility for tribal members. SDG&E's Tribal Relations team includes a dedicated manager that engages with tribal leaders, staff, and community members. Through interactions with tribal leaders and the tribal communities, SDG&E is able to gain a better understanding of the challenges and needs experienced by these communities. 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 February 2024, SDG&E participated in one educational workshop, and has scheduled additional workshops for March, to share information on low income customer programs including CARE, FERA, ESA, and other SDG&E programs and services, to tribal community members. Direct program enrollments and one-on-one customer account assistance will be provided at these workshops.

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, two tribes have received payments, we are finalizing the third payment, and SDG&E will continue to reach out to the remaining eligible tribes.

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

Awareness Marketing

In February 2024, paid customer assistance marketing remained paused as SDG&E prepares new creative.

Direct Marketing

In February 2024, SDG&E resumed direct communications and sent 7,045 emails to 3,700 customers as part of a nurture campaign. The email campaign garnered an average open rate of 60% and a 4.3% click rate.

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 February 2024, the Energy Solutions Partner Network shared over 120 customer assistance messages to more than 444,000 customers through e-newsletters, website posts, and social media channels.



Live CARE Call Campaign

SDG&E's third-party contractor, The Harris Group (THG),²³ calls targeted customers to encourage enrollment in the CARE and FERA Programs. The campaign provides SDG&E with a way to directly connect with customers in low income and hard-to-reach areas. Targeted customers also include those who are up for recertification for CARE and FERA. THG provides education about the CARE, FERA, and ESA Programs. If eligible, THG enrolls customers in the CARE and FERA programs over the phone.

²³ THG is a Diverse Business Enterprise (DBE) vendor and a woman-owned business.

The Harris Group²⁴	
ESA Leads	2,458
CARE Enrollments	1,793
CARE Recertifications	341
FERA Enrollments	89
FERA Recertifications	3

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 income 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:

²⁴ 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.

Energy Solutions Partner Network	
ESA Leads	0
CARE Enrollments	33
CARE Recertifications	8
FERA Enrollments	2
FERA Recertifications	0

Partner Spotlight

In February 2024, SDG&E's Customer Outreach and Engagement team participated in roughly 48 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, like 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 9,300 people. A few of the outreach events SDG&E participated in are highlighted below.

Grossmont Resource Fair

On February 2, 2024, SDG&E Outreach attended the Basic Needs Resource Fair & Campus Food Distribution event at Grossmont Community College. At this event, SDG&E's Outreach team educated college students and customers about low income programs, including CARE, FERA, ESA, and other programs and services offered by SDG&E.

Local Assistance Centers for Flood Aid

From February 3 through February 11, 2024, Local Assistance Centers through the City of San Diego were set up to assist those impacted by the recent flooding in San Diego. Governmental agencies and organizations that participated in these centers for aid were the City

Clerk, San Diego Housing Commission, Council Districts 4, 8, and 9 among others. The County Assessor's office, DMV, 211 San Diego, SDG&E, American Red Cross, Feeding San Diego and others were also in attendance. These Assistance Centers helped those that lost, or suffered damage to their homes and personal belongings, and to assist them in their recovery process. SDG&E provided direct enrollment support for bill assistance and low income programs, scheduled service orders for safety, and stopped service where homes were damaged beyond repair.

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
2/8/2024	Food Distribution	Chavez Resource Center	Chavez Resource Center 605 San Diego St Ocean Side, CA 92058
2/23/2024	Community Dinner Night	Iipay Nation of Santa Ysabel	100 School House Canyon Rd Santa Ysabel, CA 92070

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.

SDG&E's CCC, Branch Offices, and Payment Offices promote and offer the CARE, FERA, and ESA Programs to potentially eligible customers and enrolls customers directly into the CARE Program over the telephone.²⁵ During this reporting month, SDG&E's CCC and Branch Office generated the following applications and leads over the telephone:

	CCC	Branch Office
ESA Leads	15	0
CARE Enrollments	0	95
CARE Recertifications	3	11
FERA Enrollments	0	0
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.

²⁵ In D.16-06-054, SDG&E received Commission authorization for its CCC Energy Service Specialists to enroll customers directly into the CARE Program over the telephone.

During In-Home Assessment, a field 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 both at the time of installation and with a leave behind flyer 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, 76 Tier II power strips and 20 smart thermostats have been installed.

1.2.5 Additional Activities

There are no additional activities to report for February 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 February 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 provides customers visiting SDG&E's website with a link to The Affordable Connectivity Program (ACP) website. In January 2024, CETF reached out to SDG&E to advise that ACP is winding down.²⁶ The Federal Communications Commission has announced that ACP applications and enrollments will no longer be processed as of February 8, 2024. SDG&E partnered with CETF and shared program flyers at the Local Assistance Centers to push for final enrollments before the upcoming freeze.

1.3.2 Please provide a status on coordination with TECH Clean California

SDG&E met with Technology and Equipment for Clean Heating (TECH) Clean California during the fourth quarter of 2023. TECH Clean California and SDG&E discussed potential coordination of TECH incentives for the Southern MFWB and how these incentives could apply to MFWB. At the time of the discussion, the TECH multifamily program was fully subscribed. SDG&E and TECH plan to continue to discuss leveraging opportunities in the scheduled meeting for March 25, 2024.

²⁶ See Federal Communications Commission, The FCC is Taking Steps to Wind Down the Affordable Connectivity Program (January 12, 2024), *available at* <https://www.fcc.gov/fcc-taking-steps-wind-down-affordable-connectivity-program>.

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.

SDG&E and RHA collaborate to enhance efforts to recruit from local communities and expand the WE&T program. RHA promotes hiring low income customers in the communities served by providing flyers and education to unemployed customers about potential job opportunities with RHA. RHA works with the San Diego Workforce Partnership and Upskill California, a consortium of 28 community colleges, to connect RHA and its sub-contractors with job seekers.

1.5. ESA Studies and Pilots

1.5.1 ESA Program Studies

2025 Low Income Needs Assessment (LINA) Study

The study team met weekly during February to discuss technical aspects of the LINA Study scope of work in preparation for the development of a written research plan. A draft research plan is expected from the consultant in March.

Low Income Non-Energy Impacts Study

A project initiation meeting was held on February 15, 2024, with the consultant. Members from the ESA CARE Study Working Group were invited to attend. During the initiation meeting, the work scope was discussed. A draft work plan is expected from the consultant by the end of March 2024.

1.5.2 ESA Program Pilots

SDG&E is not currently conducting any ESA Program pilots.

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.²⁷ The CARE Program currently provides a 20% discount on natural gas charges and a 30 – 35% discount on electric rates.²⁸ 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 Budget²⁹	Actual Expenses Year-to- Date	% of Budget Spent
Outreach	\$3,365,197	\$375,509	11%
Processing, Certification and Post Enrollment Verification ³⁰	\$635,541	\$315,730	50%
Information Tech./Programming	\$493,699	\$19,812	4%
CHANGES Program	\$1,138,000	\$52,456	5%
Studies and Pilots	\$265,000	\$47,874	18%
Measurement and Evaluation	\$0	\$0	0%
Regulatory Compliance	\$19,535	\$0	0%
General Administration	\$327,798	\$32,977	10%
CPUC Energy Division Staff	\$694,575	\$65,519	9%
	\$74,023	\$68	0%
Total Expenses	\$7,013,368	\$909,945	13%
Subsidies and Benefits	\$235,468,332	\$40,855,909	17%

²⁷ The CARE Program was later implemented by the Commission in D.89-07-062 and D.89-09-044.

²⁸ 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.”

²⁹ D.21-06-015 approved the CARE program budget for PYs 2021-2026.

Total Program Costs and Discounts	\$242,481,700	\$41,765,854	17%
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2.1.2. Please Provide the CARE Program enrollment rate to date.

CARE Table 2.1.2 CARE Program Enrollment		
Participants Enrolled	Eligible Participants³¹	Enrollment Rate
336,584	301,966	111%

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 8,163 completed CARE applications and 6,185 new enrollments for the program. This month, data sharing efforts between SoCalGas and SDG&E resulted in 19 CARE enrollments. Also, leveraging efforts through the Grid Alternatives DAC-SASH program did not result in any enrollments and there were no reported efforts through the LIHEAP 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 2,059 direct mail letters to CARE-eligible customers without an email address on file.

³¹ On April 13, 2023, PG&E, on behalf of the IOUs, filed the Annual Estimates of CARE Eligible Customers and Related Information. This number reflects estimates of SDG&E's CARE Eligible Participants for 2023.

Email

SDG&E also continued the Bill Comparison emails, sending 52,236 emails to low income customers garnering a 55.9% open rate and a 4.6%CTR.

Online Advertising

SDG&E ran paid search advertising garnering 7,573 impressions (views) with a 34.3% 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

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

CARE Partners (Capitation Agencies)

SDG&E partners with 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). In February 2024, SDG&E began exploring partnership opportunities with Campesinos Unidos, Inc. (CUI) for customer assistance enrollment support.

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. The following numbers were generated by the Capitation Agencies this month:

Capitation Agencies	
ESA Leads	191
CARE Enrollments	145
CARE Recertification	73
FERA Enrollments	2
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:	YTD³²
ESA Leads	0	0
CARE Enrollments	93	184
CARE Recertifications	41	77

³² Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

FERA Enrollments	1	2
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 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	February 2024	YTD
ESA	70	136

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 called in when they received a Spanish version of the recertification letter in the mail instead of English. The Call Center resent an English version of the letter to the customer and updated the customer's language preference to English.

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

A pre-scoping public workshop was held on February 14, 2024, to discuss the upcoming CHANGES evaluation and solicit work scope ideas from stakeholders. A CPUC representative led the workshop. No comments were received from the attendees. The study team will meet in March 2024 to continue discussions on the scope development for this study.

2.4.2. CARE Program Pilots

Currently, there are no CARE pilots to report.

2.5.1 CARE Program PEV Freezes³³

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. The Table below details the CARE program freezes currently in place as of February 2024.

³³ Resolution M-4833 directed 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.

CARE Table 2.5.1 CARE Program Post-Enrollment Verification Freezes			
Date of Proclamation ³⁴	Disaster Name	Affected Areas or ZIP Codes	Date when Protection Ends ³⁵
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

2.5.2 CARE Fixed Income

CARE Fixed Income		
	February 2024	YTD
New CARE Fixed Income Households	434	946

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

³⁴ 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.

³⁵ 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.

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.³⁶ 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.³⁷

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.

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 Budget³⁸	Actual Expenses to Date	% of Budget Spent
Outreach	\$368,338	\$27,141	7%
Proc., Certification and Verification	\$13,925	\$3,865	28%
Post Enrollment Verification	\$1,018	\$2,400	236%
Information Tech./Programming	\$54,636	\$2,217	4%
Pilots	\$0	\$0	0%
Studies	\$50,000	\$0	0%
Regulatory Compliance	\$47,180	\$6,567	14%

³⁶ 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.”

³⁷ 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.”

³⁸ D.21-06-015 approved the FERA program budget for PYs 2021-2026.

General Administration	\$75,915	\$12,120	16%
CPUC Energy Division Staff	\$10,803	\$9	0%
Total Expenses	\$621,815	\$54,319	9%
Subsidies and Benefits	\$4,481,107	\$678,319	15%
Total Program Costs and Discounts	\$5,102,922	\$732,638	14%

3.1.2. Provide the FERA Program enrollment rate to date.

FERA Table 3.1.2 FERA Enrollment		
Participants Enrolled	Eligible Participants ³⁹	Enrollment Rate
10,161	42,980	24%

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 378 completed FERA applications and 278 new enrollments for the program. Leveraging efforts through the Grid Alternatives DAC-SASH program did not result in any FERA enrollments. SDG&E is working with CUI in leveraging FERA customers. SDG&E intends to add CUI under their capitation agency list in an attempt to secure more FERA enrollments. Below is a summary of FERA-specific outreach efforts.

³⁹ On April 13, 2023, PG&E, on behalf of the IOUs, filed the Annual Estimates of CARE Eligible Customers and Related Information. This number reflects estimates of SDG&E's CARE Eligible Participants for 2023.

Direct Marketing

Direct Mail

In February 2024, SDG&E continued the monthly FERA bill comparison letters, sending over 900 direct mail letters to FERA-eligible customers that don't have an email address on file.

Email

This month, SDG&E sent 12,175 FERA bill comparison emails, which garnered a 60% open rate and a 4% click-through rate. Additionally, 47,906 generic emails, with no bill comparison, were sent to CCA customers, garnering a 49% open rate and a 4.3% click through rate.

Organic Social

SDG&E utilized organic social media to promote FERA on SDG&E's Facebook, Instagram, and Nextdoor channels. This month's posts performed above average.

	Impressions	Engagements	Engagement Rate
Facebook	653	9	1.38%
Instagram	587	22	3.7%
Nextdoor	49,731	5	1%

Community Outreach & Engagement

SDG&E works closely with community-based organizations and other external groups to connect customers with programs and solutions related to company offerings. SDG&E works with a network of approximately 200 community-based organizations, collectively named the Energy Solutions Partner Network, as well as other external organizations on an as needed or requested basis. SDG&E's Outreach utilizes these networks, including CARE Capitation agencies, to educate and enroll customers in eligible Customer Assistance programs. The FERA

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

In February 2024, SDG&E identified and began meeting with select CBOs that will participate in a FERA initiative to help increase program awareness and enrollments. CBO staff will receive FERA refresher training and create individualized plans to enhance FERA outreach at community events.

Tribal Outreach

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

FERA Partners (Capitation Agencies)

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

3.3. FERA Recertification Complaints

3.3.1. Report the number of customer complaints received (formal or informal, however and wherever received) about their 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

February 2024

SA Program TOTAL

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

[2] OP 12 of D. 15-01-027 states "The Program Administrators shall ensure that program expenditures in each utility's service territory do not exceed the total authorized budget amounts over the duration of the programs. The program incentive budgets will be available until all funds are exhausted or until December 31, 2021, whichever occurs first. Any money unspent and unencumbered on January 1, 2022, shall be used for "cost-effective energy efficiency measures in low-income residential housing that benefit ratepayers," as set forth in Public Utilities Code Section 2852(c)(3)." 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
February 2024

Appliances ESA Program:	Authorized Budget [1]		Current Month Expenses			Year to Date Expenses		% of Budget Spent YTD	
	Electric	Gas	Electric	Gas	Total	Electric	Gas	Electric	Gas
Energy Efficiency									
Appliances			\$ 148,503	\$ 37,992	\$ 186,495	\$ 217,221	\$ 50,841		
Domestic Hot Water			\$ 8,470	\$ 273,842	\$ 282,312	\$ 12,339	\$ 398,945		
Enclosure			\$ 114,867	\$ 152,266	\$ 267,133	\$ 174,926	\$ 231,878		
HVAC			\$ 46,647	\$ 448,600	\$ 495,247	\$ 70,112	\$ 659,098		
Maintenance			\$ -	\$ -	\$ -	\$ -	\$ -		
Lighting			\$ 35,169	\$ -	\$ 35,169	\$ 52,488	\$ -		
Miscellaneous			\$ 36,437	\$ -	\$ 36,437	\$ 54,874	\$ -		
Customer Enrollment			\$ 225,896	\$ 225,896	\$ 451,792	\$ 337,633	\$ 337,633		
In Home Education			\$ 20,304	\$ 20,304	\$ 40,608	\$ 30,361	\$ 30,361		
Pilot			\$ -	\$ -	\$ -	\$ -	\$ -		
Implementer Compensation			\$ 1,937	\$ 1,937	\$ 3,874	\$ 32,397	\$ 32,397		
Safety - Unexpected overhead costs			\$ -	\$ -	\$ -	\$ -	\$ -		
Energy Efficiency TOTAL			\$ 638,230	\$ 1,160,837	\$ 1,799,067	\$ 982,351	\$ 1,741,153		19%
Training Center			\$ -	\$ -	\$ -	\$ -	\$ -		
Workforce Education and Training			\$ 248,304	\$ -	\$ 248,304	\$ -	\$ -		
Inspections			\$ -	\$ -	\$ -	\$ -	\$ -		
Marketing and Outreach			\$ 103,744	\$ 5,864	\$ 11,728	\$ 10,781	\$ 10,781		
Studies			\$ 1,587,362	\$ 39,564	\$ 79,128	\$ 48,570	\$ 48,570		
Regulatory Compliance			\$ 50,000	\$ -	\$ -	\$ -	\$ -		
General Administration			\$ 295,630	\$ 6,202	\$ 12,404	\$ 13,596	\$ 13,596		
CPUC Energy Division			\$ 2,358,952	\$ 81,926	\$ 163,852	\$ 130,459	\$ 130,459		
SPOC [2]			\$ 56,348	\$ -	\$ -	\$ 30	\$ 30		
TOTAL PROGRAM COSTS			\$ 18,876,805	\$ 771,786	\$ 1,294,393	\$ 1,185,787	\$ 1,944,589		17%
Indirect Costs [3]				\$ 58,401	\$ 121,110	\$ 179,511	\$ 99,384	\$ 163,142	
NGAT Costs					\$ 4,225	\$ 4,225	\$ (622)	\$ (622)	
ESA Program Administrative Expenses [4]									
Administrative Cap			\$ 70,002	\$ 70,002	\$ 140,004	\$ 116,150	\$ 116,150		
Total Program Costs			\$ 771,786	\$ 1,294,393	\$ 2,066,179	\$ 1,185,787	\$ 1,944,589		
% of Administrative Spend					6.78%				7.42%

[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 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.

February 2024

ESA Program - Main	Year to Date Expenses(\$)		
	Electric	Gas	Total
Administration (5)	\$ 203,436	\$ 203,436	\$ 406,872
Direct Implementation (Non-Incentive) (6)	\$ 39,397	\$ 32,937	\$ 64,784
Direct Implementation (7)	\$ 649,994	\$ 1,701,766	\$ 2,658,770
TOTAL ESA Main COSTS	\$ 1,162,737	\$ 1,944,699	\$ 3,130,376

NOTE: All survey responses are confidential based on the following sources: ENVIOL Impact Index Questionnaire, General Administrative and OPHUC Energy Division questionnaires presented in this volume are calculated as percentages of total response. The values shown are rounded to 0.00337 in accuracy.

Legend: * = Data was collected from multiple sources; ** = Data was collected from multiple sources; *** = Data was collected from multiple sources; **** = Data was collected from multiple sources; ***** = Data was collected from multiple sources

Abbreviations: CDD = Chlorinated Dibenzo-p-dioxins; PCBs = Polychlorinated Biphenyls; PAHs = Polycyclic Aromatic Hydrocarbons; VOCs = Volatile Organic Compounds; SVOCs = Semi-Volatile Organic Compounds; HAPs = Hazardous Air Pollutants; Emissions = Total emissions; Discharges = Total discharges; Releases = Total releases; Incidents = Total incidents; Complaints = Total complaints; Investigations = Total investigations; Enforcement = Total enforcement; Remediation = Total remediation; Monitoring = Total monitoring; Sampling = Total sampling; Testing = Total testing; Analysis = Total analysis; Reporting = Total reporting; Compliance = Total compliance; Management = Total management; Planning = Total planning; Implementation = Total implementation; Evaluation = Total evaluation; Review = Total review; Improvement = Total improvement; Training = Total training; Education = Total education; Outreach = Total outreach; Communication = Total communication; Public Involvement = Total public involvement; Stakeholder Engagement = Total stakeholder engagement; Community Development = Total community development; Environmental Justice = Total environmental justice; Climate Change = Total climate change; Air Quality = Total air quality; Water Quality = Total water quality; Land Use = Total land use; Noise and Vibration = Total noise and vibration; Socioeconomics = Total socioeconomics; Health = Total health; Safety = Total safety; Security = Total security; Emergency Response = Total emergency response; Disaster Preparedness = Total disaster preparedness; Resilience = Total resilience; Sustainability = Total sustainability; Innovation = Total innovation; Leadership = Total leadership; Governance = Total governance; Policy = Total policy; Law = Total law; Regulation = Total regulation; Standard = Total standard; Code of Practice = Total code of practice; Guideline = Total guideline; Best Practice = Total best practice; Benchmark = Total benchmark; Metric = Total metric; Indicator = Total indicator; Measure = Total measure; Outcome = Total outcome; Result = Total result; Benefit = Total benefit; Cost = Total cost; Risk = Total risk; Opportunity = Total opportunity; Challenge = Total challenge; Issue = Total issue; Problem = Total problem; Solution = Total solution; Recommendation = Total recommendation; Conclusion = Total conclusion; Summary = Total summary; Appendix = Total appendix; Reference = Total reference; Bibliography = Total bibliography; Glossary = Total glossary; Acronym = Total acronym; Abbreviation = Total abbreviation; Unit = Total unit; Conversion = Total conversion; Formula = Total formula; Equation = Total equation; Graph = Total graph; Figure = Total figure; Table = Total table; Chart = Total chart; Map = Total map; Diagram = Total diagram; Flowchart = Total flowchart; Process = Total process; Procedure = Total procedure; Protocol = Total protocol; Manual = Total manual; Handbook = Total handbook; Guide = Total guide; Toolkit = Total toolkit; Resource = Total resource; Database = Total database; System = Total system; Software = Total software; Hardware = Total hardware; Equipment = Total equipment; Material = Total material; Supply = Total supply; Demand = Total demand; Market = Total market; Industry = Total industry; Sector = Total sector; Economy = Total economy; Society = Total society; Culture = Total culture; Religion = Total religion; Politics = Total politics; Government = Total government; Organization = Total organization; Institution = Total institution; Association = Total association; Union = Total union; Guild = Total guild; Fraternity = Total fraternity; Sorority = Total sorority; Club = Total club; Team = Total team; Group = Total group; Community = Total community; Neighborhood = Total neighborhood; District = Total district; City = Total city; Town = Total town; Village = Total village; Hamlet = Total hamlet; Estate = Total estate; Manor = Total manor; Castle = Total castle; Palace = Total palace; Villa = Total villa; Mansion = Total mansion; House = Total house; Cottage = Total cottage; Cabin = Total cabin; Hut = Total hut; Shack = Total shack; Bungalow = Total bungalow; Condominium = Total condominium; Apartment = Total apartment; Flat = Total flat; Loft = Total loft; Penthouse = Total penthouse; Suite = Total suite; Room = Total room; Bedroom = Total bedroom; Bathroom = Total bathroom; Kitchen = Total kitchen; Living Room = Total living room; Dining Room = Total dining room; Hallway = Total hallway; Staircase = Total staircase; Porch = Total porch; Deck = Total deck; Patio = Total patio; Garden = Total garden; Yard = Total yard; Lawn = Total lawn; Trees = Total trees; Plants = Total plants; Flowers = Total flowers; Fruits = Total fruits; Vegetables = Total vegetables; Grains = Total grains; Legumes = Total legumes; Nuts = Total nuts; Seeds = Total seeds; Spices = Total spices; Herbs = Total herbs; Mushrooms = Total mushrooms; Fungi = Total fungi; Bacteria = Total bacteria; Viruses = Total viruses; Parasites = Total parasites; Protozoa = Total protozoa; Insects = Total insects; Arachnids = Total arachnids; Mollusks = Total mollusks; Annelids = Total annelids; Chordates = Total chordates; Fish = Total fish; Amphibians = Total amphibians; Reptiles = Total reptiles; Birds = Total birds; Mammals = Total mammals; Monkeys = Total monkeys; Apes = Total apes; Humans = Total humans; Aliens = Total aliens; Gods = Total gods; Goddesses = Total goddesses; Angels = Total angels; Demons = Total demons; Devils = Total devils; Satan = Total Satan; Hell = Total Hell; Heaven = Total Heaven; Paradise = Total Paradise; Purgatory = Total Purgatory; Limbo = Total Limbo; Netherworld = Total Netherworld; Underworld = Total Underworld; Otherworld = Total Otherworld; Beyond = Total Beyond; Afterlife = Total Afterlife; Death = Total Death; Life = Total Life; Birth = Total Birth; Growth = Total Growth; Development = Total Development; Evolution = Total Evolution; Progress = Total Progress; Change = Total Change; Transformation = Total Transformation; Transition = Total Transition; Shift = Total Shift; Turn = Total Turn; Bend = Total Bend; Curve = Total Curve; Arc = Total Arc; Circle = Total Circle; Sphere = Total Sphere; Cube = Total Cube; Square = Total Square; Rectangle = Total Rectangle; Triangle = Total Triangle; Polygon = Total Polygon; Polyhedron = Total Polyhedron; Solid = Total Solid; Surface = Total Surface; Volume = Total Volume; Mass = Total Mass; Weight = Total Weight; Force = Total Force; Pressure = Total Pressure; Temperature = Total Temperature; Humidity = Total Humidity; Wind = Total Wind; Rain = Total Rain; Snow = Total Snow; Ice = Total Ice; Fog = Total Fog; Clouds = Total Clouds; Storm = Total Storm; Hurricane = Total Hurricane; Tornado = Total Tornado; Earthquake = Total Earthquake; Tsunami = Total Tsunami; Flood = Total Flood; Drought = Total Drought; Fire = Total Fire; War = Total War; Peace = Total Peace; Love = Total Love; Hate = Total Hate; Joy = Total Joy; Sadness = Total Sadness; Anger = Total Anger; Fear = Total Fear; Surprise = Total Surprise; Disbelief = Total Disbelief; Shock = Total Shock; Horror = Total Horror; Grief = Total Grief; Sorrow = Total Sorrow; Pain = Total Pain; Pleasure = Total Pleasure; Comfort = Total Comfort; Convenience = Total Convenience; Ease = Total Ease; Simplicity = Total Simplicity; Complexity = Total Complexity; Difficulty = Total Difficulty; Hardship = Total Hardship; Struggle = Total Struggle; Conflict = Total Conflict; Harmony = Total Harmony; Balance = Total Balance; Imbalance = Total Imbalance; Disorder = Total Disorder; Order = Total Order; Chaos = Total Chaos; Control = Total Control; Freedom = Total Freedom; Restriction = Total Restriction; Limitation = Total Limitation; Possibility = Total Possibility; Probability = Total Probability; Certainty = Total Certainty; Uncertainty = Total Uncertainty; Risk = Total Risk; Danger = Total Danger; Safety = Total Safety; Security = Total Security; Protection = Total Protection; Defense = Total Defense; Attack = Total Attack; Invasion = Total Invasion; Occupation = Total Occupation; Colonization = Total Colonization; Conquest = Total Conquest; Victory = Total Victory; Defeat = Total Defeat; Success = Total Success; Failure = Total Failure; Achievement = Total Achievement; Accomplishment = Total Accomplishment; Attainment = Total Attainment; Realization = Total Realization; Fulfillment = Total Fulfillment; Satisfaction = Total Satisfaction; Contentment = Total Contentment; Happiness = Total Happiness; Well-being = Total Well-being; Welfare = Total Welfare; Prosperity = Total Prosperity; Wealth = Total Wealth; Poverty = Total Poverty; Riches = Total Riches; Poor = Total Poor; Noble = Total Noble; Common = Total Common; Ordinary = Total Ordinary; Extraordinary = Total Extraordinary; Unique = Total Unique; Rare = Total Rare; Uncommon = Total Uncommon; Usual = Total Usual; Normal = Total Normal; Abnormal = Total Abnormal; Strange = Total Strange; Weird = Total Weird; Odd = Total Odd; Outrageous = Total Outrageous; Incredible = Total Incredible; Amazing = Total Amazing; Astonishing = Total Astonishing; Breathtaking = Total Breathtaking; Stunning = Total Stunning; Spectacular = Total Spectacular; Magnificent = Total Magnificent; Wonderful = Total Wonderful; Fantastic = Total Fantastic; Awesome = Total Awesome; Amazing = Total Amazing; Incredible = Total Incredible; Unbelievable = Total Unbelievable; Mind-blowing = Total Mind-blowing; Jaw-dropping = Total Jaw-dropping; Mouth-watering = Total Mouth-watering; Heart-melting = Total Heart-melting; Soul-stirring = Total Soul-stirring; Spirit-lifting = Total Spirit-lifting; Uplifting = Total Uplifting; Inspiring = Total Inspiring; Motivational = Total Motivational; Encouraging = Total Encouraging; Supportive = Total Supportive; Helpful = Total Helpful; Useful = Total Useful; Practical = Total Practical; Feasible = Total Feasible; Viable = Total Viable; Possible = Total Possible; Achievable = Total Achievable; Attainable = Total Attainable; Obtainable = Total Obtainable; Accessible = Total Accessible; Available = Total Available; Obtainable = Total Obtainable; Acquirable = Total Acquirable; Gainable = Total Gainable; Profitable = Total Profitable; Beneficial = Total Beneficial; Advantageous = Total Advantageous; Favorable = Total Favorable; Positive = Total Positive; Optimistic = Total Optimistic; Hopeful = Total Hopeful; Confident = Total Confident; Assured = Total Assured; Certain = Total Certain; Sure = Total Sure; Firm = Total Firm; Steady = Total Steady; Stable = Total Stable; Secure = Total Secure; Safe = Total Safe; Sound = Total Sound; Wise = Total Wise; Prudent = Total Prudent; Sensible = Total Sensible; Reasonable = Total Reasonable; Logical = Total Logical; Rational = Total Rational; Objective = Total Objective; Impartial = Total Impartial; Fair = Total Fair; Just = Total Just; Equitable = Total Equitable; Proportional = Total Proportional; Appropriate = Total Appropriate; Suitable = Total Suitable; Proper = Total Proper; Correct = Total Correct; Right = Total Right; True = Total True; Honest = Total Honest; Truthful = Total Truthful; Sincere = Total Sincere; Genuine = Total Genuine; Authentic = Total Authentic; Original = Total Original; Unique = Total Unique; Novel = Total Novel; Innovative = Total Innovative; Creative = Total Creative; Imaginative = Total Imaginative; Visionary = Total Visionary; Forward-thinking = Total Forward-thinking; Progressive = Total Progressive; Modern = Total Modern; Contemporary = Total Contemporary; Current = Total Current; Up-to-date = Total Up-to-date; Relevant = Total Relevant; Timely = Total Timely; Pertinent = Total Pertinent; Applicable = Total Applicable; Appropriate = Total Appropriate; Suitable = Total Suitable; Proper = Total Proper; Correct = Total Correct; Right = Total Right; True = Total True; Honest = Total Honest; Truthful = Total Truthful; Sincere = Total Sincere; Genuine = Total Genuine; Authentic = Total Authentic; Original = Total Original; Unique = Total Unique; Novel = Total Novel; 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Novel = Total Novel; Innovative = Total Innovative; Creative = Total Creative; Imaginative = Total Imaginative; Visionary = Total Visionary; Forward-thinking = Total Forward-thinking; Progressive = Total Progressive; Modern = Total Modern; Contemporary = Total Contemporary; Current = Total Current; Up-to-date = Total Up-to-date; Relevant = Total Relevant; Timely = Total Timely; Pertinent = Total Pertinent; Applicable = Total Applicable; Appropriate = Total Appropriate; Suitable = Total Suitable; Proper = Total Proper; Correct = Total Correct; Right = Total Right; True = Total True; Honest = Total Honest; Truthful = Total Truthful; Sincere = Total Sincere; Genuine = Total Genuine; Authentic = Total Authentic; Original = Total Original; Unique = Total Unique; Novel = Total Novel; Innovative = Total Innovative; Creative = Total Creative; Imaginative = Total Imaginative; Visionary = Total Visionary; Forward-thinking = Total Forward-thinking; Progressive = Total Progressive; Modern = Total Modern; Contemporary = Total Contemporary; Current = Total Current; Up-to-date = Total Up-to-date; Relevant = Total Relevant; Timely = Total Timely; Pertinent = Total Pertinent; Applicable = Total Applicable; Appropriate = Total Appropriate; Suitable = Total Suitable; Proper = Total Proper; Correct = Total Correct; Right = Total Right; True = Total True; Honest = Total Honest; Truthful = Total Truthful; Sincere = Total Sincere; Genuine = Total Genuine; Authentic = Total Authentic; Original = Total Original; Unique = Total Unique; Novel = Total Novel; Innovative = Total Innovative; Creative = Total Creative; Imaginative = Total Imaginative; Visionary = Total Visionary; Forward-thinking = Total Forward-thinking; Progressive = Total Progressive; Modern = Total Modern; Contemporary = Total Contemporary; Current = Total Current; Up-to-date = Total Up-to-date; Relevant = Total Relevant; Timely = Total Timely; Pertinent = Total Pertinent; Applicable = Total Applicable; Appropriate = Total Appropriate; Suitable = Total Suitable; Proper = Total Proper; Correct = Total Correct; Right = Total Right; True = Total True; Honest = Total Honest; Truthful = Total Truthful; Sincere = Total Sincere; Genuine = Total Genuine; Authentic = Total Authentic; Original = Total Original; Unique = Total Unique; Novel = Total Novel; Innovative = Total Innovative; Creative = Total Creative; Imaginative = Total Imaginative; Visionary = Total Visionary; Forward-thinking = Total Forward-thinking; Progressive = Total Progressive; Modern = Total Modern; Contemporary = Total Contemporary; Current = Total Current; Up-to-date = Total Up-to-date; Relevant = Total Relevant; Timely = Total Timely; Pertinent = Total Pertinent; Applicable = Total Applicable; Appropriate = Total Appropriate; Suitable = Total Suitable; Proper = Total Proper; Correct = Total Correct; Right = Total Right; True = Total True; Honest = Total Honest; Truthful = Total Truthful

February 2024

Table 2A ESA Program - Multifamily Whole Building⁴[illegible]

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated ¹	0
Subtotal of Market-appraised Multifamily Properties Treated	0
Total Number of Multifamily Tenant Units with Properties Treated ²	0
Total Number of buildings with Properties Treated	0

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

	Year to Date Expenses		
	Electric	Gas	Total
ESA Program - MWVB			
Administration	\$ 111,808	\$ 22,726	\$ 134,534
Administrative (all on Non-Profit)	\$ 87,349	\$ 67,349	\$ 154,698
Direct Workstation	\$	\$	\$
BPOC	\$ 12,917	\$ 12,917	\$ 25,834
TOTAL MWVB COSTS	\$ 212,134	\$ 22,652	\$ 234,786

[1] Multifamily properties are sales with at least five (5) or more dwelling units. The properties may have multiple buildings.

[3] Commissioning costs, as allowable per the Decision, are includable in measures total cost unless otherwise noted.

NOTE: All required correctioned adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments. NOTE: All costs may be covered by other programs or projects so all participants will have a neutral cost associated with their project.

Energy Savings Assistance Program Table 2B – Pilot Plus and Pilot Deep
San Diego Gas & Electric Company
February 2024

Measure ⁽¹⁾	Units	ESA Program - Pilot Plus					ESA Program - Pilot Deep				
		Quantity Installed	kWh (Annual)	Therms (Annual)	Expenditures (\$) ⁽¹⁾	% of Expenditure	Quantity Installed	kWh (Annual)	Therms (Annual)	Expenditures (\$) ⁽¹⁾	% of Expenditure
Appliances ⁽²⁾											
Efficient Electric Dryer	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Heat Pump Dryer	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
High Efficiency Clothes Washers	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Induction Cooktop/Range	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Pool Pump Retrocommissioning (RC-x)	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Pool Pump Replacement	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Refrigerator	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Standard Electric Range	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Tier 2 Adv Power Strip w Bluetooth	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Domestic Hot Water ⁽³⁾											
Heat Pump Water Heater - Full Sub	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Heat Pump Water Heater - Fuel Sub (120V)	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Heat Pump Water Heater - Fuel Sub (120V)	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Low Flow Showerhead	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Storage Water Heater	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Tankless On-Demand	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Tub Diverter/Tub Spout	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Water Heater Blanket	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Water Heater Pipe Insulation	Lm. Ft.	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Attic Insulation	Sq. ft.	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Diagnostic Air Sealing	Home	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Exterior Wall Insulation	Sq. ft.	-	-	-	\$	0.0%	-	-	-	\$	0.0%
HVAC											
Central Air Conditioner (A/C)	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Fan Controller for A/C	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
High Efficiency Furnace	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Diagnostic Duct Sealing	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Duct Replacement	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Ducted Heat Pump - Equipment Upgrade	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Ducted Heat Pump - Fuel Substitution	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Ductless Heat Pump - Fuel Substitution	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Ductless Heat Pump - Fuel Substitution	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Smart Thermostat	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Whole House Fan	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Packaged HVAC	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Minor Home Repair	Home	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Lighting											
A-Lamp LED	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Miscellaneous	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Cold Storage	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Air Purifier	Each	-	-	-	\$	0.0%	-	-	-	\$	0.0%
ESA Outreach & Assessment	Home	-	-	-	\$	0.0%	-	-	-	\$	0.0%
ESA In-Home Energy Education	Home	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Total Savings/Expenditures											
Households Treated											
- Single Family Households Treated	Home	-	-	-	\$	0.0%	-	-	-	\$	0.0%
- Mobile Home Households Treated	Home	-	-	-	\$	0.0%	-	-	-	\$	0.0%
Total Number of Households Treated											

ESA Program - Pilot Plus and Pilot Deep	Year to Date Expenses ⁽³⁾			
	Electricity	Gas	Total	
Administration ⁽⁴⁾	\$ 33,060	\$ 33,060	\$ 67,920	
Direct Implementation (Non-Incentive) ⁽⁵⁾	\$ -	\$ -	\$ -	
Direct Implementation ⁽⁶⁾	\$ -	\$ -	\$ -	<< includes measures costs
TOTAL Pilot Plus and Pilot Deep COSTS	\$ 33,060	\$ 33,060	\$ 67,920	

ESA Program - Pilot Plus and Pilot Deep	Year to Date Expenses ⁽³⁾			
	Electricity	Gas	Total	
Inspections	\$ -	\$ -	\$ -	
Marketing and Outreach	\$ -	\$ -	\$ -	
General Administration	\$ 33,060	\$ 33,060	\$ 67,920	
ESA Outreach Center -- Admin	\$ -	\$ -	\$ -	
ESA Studios	\$ -	\$ -	\$ -	
Direct Installation -- Materials	\$ -	\$ -	\$ -	
Performance Incentive	\$ -	\$ -	\$ -	
Home Audit Incentive	\$ -	\$ -	\$ -	
Admin & Marketing	\$ -	\$ -	\$ -	

(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 reported by the Pilot Implementer. (2) The measure list for SDG&E Pilot Plus and Deep is unique to the pilot and differs from Main ESA. (3) Total ESA Pilot Plus and Pilot Deep YTD expenses may contain a combination of expenses and accrued expenses. (4) Administration includes expenses from the following categories: General Administration, 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
February 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
February 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	Home	-	-	\$ -	0.0%
	Home	-	-	\$ -	0.0%
Total Savings/Expenditures			-	\$ -	0.0%
Households Treated					
- Single Family Households Treated	Home	Total			
- Multifamily Dwelling Units Treated	Home				
Total Number of Households Treated	Home	-			

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

<</Includes measures costs

ESA Program - Clean Energy Homes New Construction Pilot						
	Units	Monthly Total	YTD Total (Living Units)	YTD Total (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				\$ -		0.00%

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

ESA Program - CSD Leveraging									
Measures	Basic	Plus	Units	Year-to-Date Completed & Expensed Installation					% of Expenditure
				Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenditures (\$)	
Appliances									
High Efficiency Clothes Washer			Each	-	-	-	-	-	-
Refrigerator			Each	-	-	-	-	-	-
New - Clothes Dryer			Each	-	-	-	-	-	-
New - Dishwasher			Each	-	-	-	-	-	-
Freezers			Each	-	-	-	-	-	-
Domestic Hot Water									
Water Heater Tank and Pipe Insulation			Home	-	-	-	-	-	-
Water Heater Repair/Replacement			Home	-	-	-	-	-	-
Low-Flow Showerhead/ Combined Showerhead/TSV			Each	-	-	-	-	-	-
Heat Pump Water Heater			Each	-	-	-	-	-	-
Thermostatic Tub Spout/Diverter			Home	-	-	-	-	-	-
Thermostatic Shower Valve			Home	-	-	-	-	-	-
New - Solar Water Heating			Home	-	-	-	-	-	-
Enclosure									
Air Sealing			Home	-	-	-	-	-	-
Chimney			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			Home	-	-	-	-	-	-
New - Comprehensive Home Health and Safety Check-up			Home	-	-	-	-	-	-
New - CO and Smoke Alarm			Each	-	-	-	-	-	-
Pilots									
Customer Enrollment			-	-	-	-	-	-	-
ESA Outreach & Assessment			Home	-	-	-	-	-	-
ESA In-Home Energy Education			Home	-	-	-	-	-	-
Total Savings/Expenditures			-	-	-	-	-	-	-
Total Households Weatherized			-	-	-	-	-	-	-
CSD MF Tenant Units Treated			-	-	-	-	-	-	-
Total			-	-	-	-	-	-	-

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

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
February 2024

Table 3A, ESA Program (SF, MH)	
Annual kWh Savings	60,966
Annual Therm Savings	1,300
Lifecycle kWh Savings	485,526
Lifecycle Therm Savings	10,098
Current kWh Rate	\$0.25
Current Therm Rate	\$1.69
Average 1st Year Bill Savings / Treated Households	\$31.86
Average Lifecycle Bill Savings / Treated Households	\$252.86

Table 3B, ESA Program - Multifamily Whole Building (MF In-Unit) [4]	
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 3C, ESA Program - Multifamily Whole Building (MF-WB)	
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), MF-WB, CSD Leveraging, Pilot Plus and Pilot Deep [3]	
Annual kWh Savings	60,966
Annual Therm Savings	1,300
Lifecycle kWh Savings	485,526
Lifecycle Therm Savings	10,098
Current kWh Rate	\$
Current Therm Rate	\$
Average 1st Year Bill Savings / Treated Households	\$
Average Lifecycle Bill Savings / Treated Households	\$

[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] This table summarizes the energy savings and average bill savings for the entire program, including all measures and buildings.
[4] Separating MF-WB 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
February 2024

Table 4A, ESA Program (SF, MH)					
County	Eligible Households [2]			Households Treated YTD	
	Rural [1]	Urban	Total	Rural	Urban
Orange	0	21,308	21,308	0	0
San Diego	8,986	355,023	364,009	229	7
Total	8,986	376,331	385,317	229	7

Table 4B, ESA Program - MF CAM					
County	Households Treated YTD			Households Treated YTD	
	Rural [1]	Urban	Total	Rural	Urban
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

Table 4C, ESA Program - MFWB (MF In-Unit)					
County	Eligible Properties			Properties Treated YTD	
	Rural [1]	Urban	Total	Rural	Urban
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

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

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

Table 4F, ESA Program - CSD Leveraging					
County	Eligible Households[4]			Households Treated YTD	
	Rural [1]	Urban	Total	Rural	Urban
Orange	-	-	-	-	-
San Diego	-	-	-	-	-
Total	0	0	0	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 SA - SE - Energy Savings Assistance Program Customer Summary
San Diego Gas & Electric Company
February 2024

Month	Table SA: ESA Program (SF, MH)						Electric Only						Total	
	Gas & Electric			Gas Only			# of Household Treated by			Therm			Annual	
	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	Therm	kWh
January	222	1,300	59,992	5	-	-	14	-	2,194	0	296	1,500	60,996	6
February	-	-	-	-	-	-	-	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-	-	-	-	-	-	-	-
April	-	-	-	-	-	-	-	-	-	-	-	-	-	-
May	-	-	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-	-	-
August	-	-	-	-	-	-	-	-	-	-	-	-	-	-
September	-	-	-	-	-	-	-	-	-	-	-	-	-	-
October	-	-	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-	-	-
YTD	222	1,300	59,992	5	-	-	14	-	2,194	0	296	1,500	60,996	6

YTD Total Energy Credits for all fuel types should equal YTD energy credits 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.

Month	Table SB: ESA Program - MFHB in-Juni						Electric Only						Total	
	Gas & Electric			Gas Only			# of Household Treated by			Therm			Annual	
	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	Therm	kWh
January	-	-	-	-	-	-	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-	-	-	-	-	-	-	-
April	-	-	-	-	-	-	-	-	-	-	-	-	-	-
May	-	-	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-	-	-
August	-	-	-	-	-	-	-	-	-	-	-	-	-	-
September	-	-	-	-	-	-	-	-	-	-	-	-	-	-
October	-	-	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-	-	-
YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	-

YTD Total Energy Credits for all fuel types should equal YTD energy credits 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.

Month	Table SC: ESA Program - Multifamily Whole Building (MF, MW, MFHB)						Electric Only						Total	
	Gas & Electric			Gas Only			# of Household Treated by			Therm			Annual	
	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	Therm	kWh
January	-	-	-	-	-	-	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-	-	-	-	-	-	-	-
April	-	-	-	-	-	-	-	-	-	-	-	-	-	-
May	-	-	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-	-	-
August	-	-	-	-	-	-	-	-	-	-	-	-	-	-
September	-	-	-	-	-	-	-	-	-	-	-	-	-	-
October	-	-	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-	-	-
YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Month	Table SD: ESA Program - Pilot Plus and Pilot Design Gas Only (1)						Electric Only (1)						Total	
	Gas & Electric			Gas Only			# of Household Treated by			Therm			Annual	
	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	Therm	kWh
January	-	-	-	-	-	-	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-	-	-	-	-	-	-	-
April	-	-	-	-	-	-	-	-	-	-	-	-	-	-
May	-	-	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-	-	-
August	-	-	-	-	-	-	-	-	-	-	-	-	-	-
September	-	-	-	-	-	-	-	-	-	-	-	-	-	-
October	-	-	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-	-	-
YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	0

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

Month	Table SF: ESA Program - CSD (w/avg/est)						Electric Only						Total	
	Gas & Electric			Gas Only			# of Household Treated by			Therm			Annual	
	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	# of Household Treated by Month	Therm	kWh	Therm	kWh
January	-	-	-	-	-	-	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-	-	-	-	-	-	-	-
April	-	-	-	-	-	-	-	-	-	-	-	-	-	-
May	-	-	-	-	-	-	-	-	-	-	-	-	-	-
June	-	-	-	-	-	-	-	-	-	-	-	-	-	-
July	-	-	-	-	-	-	-	-	-	-	-	-	-	-
August	-	-	-	-	-	-	-	-	-	-	-	-	-	-
September	-	-	-	-	-	-	-	-	-	-	-	-	-	-
October	-	-	-	-	-	-	-	-	-	-	-	-	-	-
November	-	-	-	-	-	-	-	-	-	-	-	-	-	-
December	-	-	-	-	-	-	-	-	-	-	-	-	-	-
YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	-

(1) ISD&E is testing dual-fuel (gas and electric) customers through ESA Pilot Plus and Design.
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
February 2024

	Authorized 2021-26 Funding			Current Month Expenses			Year to Date Expenses			Cycle to Date Expenses			% of Budget Expensed		
	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	\$ 26,717	\$ 26,717	\$ 53,434	\$ 33,960	\$ 33,960	\$ 67,920	\$97,800	\$97,800	\$ 195,600			3%
Total Pilots	\$0	\$0	\$7,633,415	\$26,717	\$26,717	\$53,434	\$33,960	\$33,960	\$67,920	\$97,800	\$97,800	\$195,600			3%
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	\$0	\$0	\$798,750	\$0	\$0	\$0	\$0	\$0	\$0	\$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
February 2024

ESA Main (SF, MH)	# of Households Eligible [1]	# of Households Treated [2]	Enrollment Rate = (C/B)	# of Households Contacted [3]	Rate of Uptake = (D/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 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	223	0%	1,003	22%	83.10	87.85	0	1.90	2.31	\$ 559
MH	22,468	13	0%	102	13%	(27.04)	(32.28)	0	(1.89)	(3.29)	\$ 443
Rent vs. Own											
Rent	136,865	68	0%	4,670	1%	76.09	76.60	0	1.55	3.11	\$ 569
Own	236,613	165	0%	10,168	2%	77.57	77.57	0	1.58	1.58	\$ 522
Previous vs. New Participant											
New	N/A	159	0%	13,085	1%	77.57	84.03	0	1.81	2.23	\$ 573
Previous [18]	13,760	77	1%	15,175	1%	60.40	61.89	0	0.81	0.83	\$ 474
Seniors [6]	168,248	76	0%	N/A	0%	61.56	66.41	0	0.87	1.38	\$ 543
Veterans [19]	47,000	189	0%	67,077	0%	63.07	75.71	0	0.71	1.71	\$ 593
Weather-Ready [7]	N/A	189	0%	N/A	0%	63.07	75.71	0	0.71	1.71	\$ 593
Vulnerable [8]	160,975	81	0%	6,030	1%	59.90	61.60	0	1.44	1.61	\$ 522
Location											
DAC	90,092	60	0%	3,737	2%	72.26	72.71	0	1.50	1.70	\$ 553
Rural	8,611	7	0%	607	1%	101.30	118.19	0	(0.90)	0.67	\$ 536
Urban	21,716	2	0%	40	0%	-	-	-	-	-	\$ -
Wildfire Zone [9]	21,716	2	0%	36	0%	-	-	-	-	-	\$ -
Wildfire Zone [9]	63,552	20	0%	2,576	1%	92.41	100.62	0	(0.42)	0.23	\$ 508
Climate Zone 6	16,775	-	0%	852	0%	-	-	-	-	-	\$ -
Climate Zone 7	244,028	152	0%	20,008	1%	66.80	71.01	0	1.85	2.14	\$ 528
Climate Zone 8	4,649	-	0%	254	0%	-	-	-	-	-	\$ -
Climate Zone 10	99,836	84	0%	7,622	1%	89.06	96.23	0	0.94	1.27	\$ 586
Climate Zone 11	1,084	-	0%	30	0%	-	-	-	-	-	\$ -
Climate Zone 15	1,084	-	0%	30	0%	-	-	-	-	-	\$ -
CARB Communities [10]	209,478	37	0%	2,653	1%	59.93	63.03	0	1.77	1.86	\$ 513
Financial											
GATE	289,316	220	0%	27,588	1%	76	80	0	2	2	\$ 558
FERA	43,709	7	0%	760	1%	51	54	0	1	1	\$ 388
Disconnected [11]	N/A	7	0%	10	0%	N/A	N/A	0	N/A	N/A	\$ -
At-Risk [12]	144,065	120	0%	10,066	1%	46	46	0	0	0	\$ 429
High Income [13]	52,414	13	0%	481	3%	108	111	0	0	0	\$ 604
High Energy Burden [14]	132,033	65	0%	3,638	2%	63	66	0	1	1	\$ 539
SEV [115]											
H	27,5474	33	0%	6,720	0%	94	103	0	0	3	\$ 589
M	21,133	16	0%	6,570	1%	77	77	0	0	2	\$ 555
W	21,133	16	0%	6,570	1%	69	77	0	0	2	\$ 555
Affordability Ratio [16]	35,421	31	0%	2,439	1%	44	45	0	1	1	\$ 492
Health Condition											
Medical Baseline	20,925	23	0%	1,428	2%	54	59	0	2	2	\$ 539
Respiratory (Asthma) [17]											
Low	283,333	74	0%	14,860	1%	70	76	0	0	2	\$ 553
Medium	113,025	77	0%	7,046	1%	70	76	0	0	2	\$ 548
High	113,907	86	0%	7,046	1%	72	75	0	0	2	\$ 548
Disabled	113,907	18	0%	N/A	0%	57	62	0	3	3	\$ 599

[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' related 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] 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 kWh, kWh, and/or Therms. Many measures offered in ESA provide Non-Energy Benefits (including Health, Comfort, and Safety (HCS)) in addition to energy savings, and some of these measures may be associated with a negative savings value.

[5] SDG&E has considered 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.

[6] This represents the number of households with at least one member who is at least 62 years old at the time of data collection.

[7] "Hard-to-reach" residential customers include "those customers who do not have easy access to program information or generally do not participate in energy efficiency programs due to a language, income, housing type, geographic, or home ownership (split incentives) barrier" (Advice Letter 4482-CR14-E dated September 1, 2021). For the purpose of this reporting, SDG&E is defining "hard-to-reach" as those residential customer self-identified as not preferring or speaking English as the primary language because income, housing type, geographic, and homeownership information is reported elsewhere on this table.

[8] Vulnerable refers to Disadvantaged Vulnerable Communities (DVC) which consist consists of communities in the 25th highest scoring census tracts according to the most current versions of the California Communities Environmental Health Screening Tool (CalEnviroScreen), and homeownership information is reported elsewhere on this table.

[9] Includes Tier 2 and 3 of the CPUC Fire Threat Map

[10] This reflects communities within SDG&E's service territory that are identified by the California Air Resources Board (CARB) Community Air Protection Program as communities that experience environmental and health inequities from air pollution.

[11] 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.

[12] SDG&E defines arrearages as overdue balance greater than 30 days. Estimated eligibility is based on CARE/FEA households with arrearages in the prior year as reported in SDG&E's R.19-07-005 Monthly Disconnection Report through December 2023.

[13] SDG&E defines high usage as at least 400% of baseline at least three times in 12-month period.

[14] SDG&E utilizes the Low-Income Energy Affordability Data (LEAD) Tool developed by DOE's Office of Energy Efficiency & Renewable Energy to identify census tracts with high energy burden (or households at below 20% Federal Poverty Level (FPL)) that are in SDG&E's service territory. The 2016 Needs Assessment for the Energy Savings Assistance and the California Alternate Rates for Energy Programs describes households that spent more 6.3% of their annual income on energy bills as having high energy burden (p.47).

[15] The Socioeconomic Vulnerability Index (SEVI) metric represents the relative socioeconomic standing of census tracts, referred to as communities, in terms of poverty, unemployment, educational attainment, linguistic isolation, and percentage of income spent on housing. SDG&E utilizes the SEVI data provided by the CPUC to map its service territory by SEVI scores (L: 0 to 33; M: >33 to 66; H: >66).

[16] The Affordability Ratio (AR) metric quantifies the percentage of a representative household's income that would be used to pay for an essential utility service after non-discretionary expenses such as housing and other essential utility service charges are deducted from the household's income. Using Gas AR20 and Electric AR20 data for 2023 (using 2019 base year) provided by the CPUC, SDG&E selects census tracts with Electric AR20 above 15% or Gas AR20 above 10% to identify areas within its service territory as having high affordability ratio (CPUC 2019 Annual Affordability Report, pp 34, 44).

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

[18] This data captures tribal households located on federally-recognized tribes whose trust lands are identified in the Bureau of Indian Affairs, and also include 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 GL) 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

February 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	0	0
SDCWA	SDG&E efforts to coordinate program information with SDCWA.	0	0	0	N/A	N/A
CARE/Medical Baseline	CARE Online Enrollments are leveraged for ESA Program Enrollments.	N/A	N/A	N/A	N/A	N/A
CARE High Usage	Leads generated through CARE HEU income verifications completed	N/A	N/A	N/A	129	48
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	29	122	0	0
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	4	21	440	7
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	0	0
MFWB ⁷	Coordination with SDG&E in their Administration of the Southern Section MFWB program	0	0	0	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 the the respective program with 120-days of their ESA in-home visitation in which they received Energy Education
 - 7 Number of referrals being supplied to SDG&E by SCE and SoCalGas, the number of Enrollments being completed on behalf of SDG&E for the MFWB
- 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
February 2024

OUTREACH STATUS	Quantity (Includes CARE, FERA, and ESA)***	List of Participating Tribes
Tribes completed ESA Meet & Confer*	13	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, lipay Nation of Santa Ysabel, La Jolla Band of Luiseno Indians, San Pasqual Band of Mission Indians, Los Coyotes Band of Cuhulla and Cupeno Indians, Sycuan Band of Kumeyaay Nation, Jamul Indian Village, Viejas Band of Kumeyaay Indians
Tribes requested outreach materials or applications	11	Pauma Band of Mission Indians, La Posta Band of Mission Indians, Mesa Grande Band of Mission Indians, lipay Nation Santa Ysabel, San Pasqual Band of Mission Indians, Campo Kumeyaay Nation, Manzanita Band of Kumeyaay Nation, La Jolla Band of Luiseno Indians, Los Coyotes Band of Cuhulla and Cupeno Indians, Barona Band of Mission Indians, and Jamul Indian Village.
Tribes who have not accepted offer to Meet and Confer	4	Ewilaapaayp, Inaja Cosmit Band of Indians****, 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		lipay Nation of Santa Ysabel, La Jolla Band of Luiseno Indians, La Posta Band of Mission Indians, Campo Kumeyaay Nation, Los Coyotes Band of Cuhulla 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)	6	
	2	Southern California American Indian Resource Center (SCAIR); Southern California Tribal Chairmen's Association (SCTCA)**
Housing Authority and TANF offices who participated in Meet and Confer	N/A	N/A

*SDG&E notes that it has held informational meetings with these tribes to provide information on low income programs and other customer programs. As such, the term Meet and Confer, used here, is unrelated to a Duty to Meet and Confer, pursuant to Rule 13.9. SDG&E invited all 17 tribes to meet in 2023 and will continue to engage throughout 2024.

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

***Numbers are a rolling count of Tribal Outreach efforts

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

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
February 2024

CARE Program:	Authorized Budget			Current Month Expenses [2]			Year to Date Expenses [2]			% 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	\$ 216,119	\$ 24,013	\$ 240,132	\$ 337,958	\$ 37,551	\$ 375,509	11%	10%	11%
Processing / Certification Re-certification	\$ 565,631	\$ 69,910	\$ 635,541	\$ 149,272	\$ 16,586	\$ 165,858	\$ 284,157	\$ 31,573	\$ 315,730	50%	45%	50%
Post Enrollment Verification	\$ 439,392	\$ 54,307	\$ 493,699	\$ 10,737	\$ 1,193	\$ 11,930	\$ 17,831	\$ 1,981	\$ 19,812	4%	4%	4%
IT Programming	\$ 1,012,820	\$ 125,180	\$ 1,138,000	\$ 24,447	\$ 2,716	\$ 27,163	\$ 47,210	\$ 5,246	\$ 52,456	5%	4%	5%
CHANGES Program	\$ 235,850	\$ 29,150	\$ 265,000	\$ 20,705	\$ 2,301	\$ 23,006	\$ 43,087	\$ 4,787	\$ 47,874	18%	16%	18%
Studies and Pilots	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Measurement and Evaluation	\$ 17,366	\$ 2,149	\$ 19,535	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance	\$ 291,740	\$ 36,058	\$ 327,798	\$ 14,731	\$ 1,637	\$ 16,368	\$ 29,679	\$ 3,298	\$ 32,977	10%	9%	10%
General Administration	\$ 618,172	\$ 76,403	\$ 694,575	\$ 28,645	\$ 3,183	\$ 31,828	\$ 58,967	\$ 6,552	\$ 65,519	10%	9%	9%
CPUC Energy Division	\$ 65,880	\$ 8,143	\$ 74,023	\$ -	\$ -	\$ -	\$ 61	\$ 7	\$ 68	0%	0%	0%
SUBTOTAL MANAGEMENT COSTS [1]	\$ 6,241,896	\$ 771,472	\$ 7,013,368	\$ 464,656	\$ 51,629	\$ 516,285	\$ 818,950	\$ 90,995	\$ 909,945	13%	12%	13%
CARE Rate Discount [2]	\$214,084,954	\$21,383,378	\$235,468,332	\$14,935,746	\$2,575,006	\$17,510,752	\$35,324,393	\$5,531,516	\$40,855,909	17%	26%	17%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 220,326,850	\$ 22,154,850	\$ 242,481,700	\$ 15,400,402	\$ 2,626,635	\$ 18,027,037	\$ 36,143,343	\$ 5,622,511	\$ 41,765,854	16%	25%	17%
Other CARE Rate Benefits												
- Wildfire Non-Bypassable Charge Exemption [3]				\$ 657,583		\$ 657,583	\$ 1,341,714		\$ 1,341,714			
- CARE Surcharge Exemption				\$ 1,689,156	\$387,673	\$ 2,076,829	\$ 3,496,819	\$745,094	\$ 4,241,913			
- kWh Surcharge Exemption				\$ 58,146		\$ 58,146	\$ 126,235		\$ 126,235			
- Vehicle Grid Integration Exemption							\$ 43,863		\$ 43,863			
Total Other CARE Rate Benefits				\$ 2,404,885	\$ 387,673	\$ 2,792,558	\$ 5,008,631	\$ 745,094	\$ 5,753,725			
Indirect Costs				\$ 76,910	\$ 8,546	\$ 85,456	\$ 147,326	\$ 16,370	\$ 163,696			

[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
February 2024

	New Enrollment										Recertification				Attrition (Drop Offs)				Enrollment		Total CARE Participants	Estimated CARE Eligible ¹	Enrollment Rate % (W/X) ²	Total Residential Accounts ³	Gas Only	Electric Only		
	Automatic Enrollment		Self-Certification (Income or Categorical)						Total New Enrollment (E+J)		Scheduled		Non-Scheduled [M]	Automatic	Total Recertification (L+M+N)	No Response ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)							Gross (K+O)	Net Adjusted (K-T)
	Inter-Utility ¹	Intra-Utility ²	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																				
January	15	66	0	81	6,247	335	452	179	7,213	7,294	5,763	3,278	838	9,899	3,764	7	575	4,595	8,941	17,108	-1,657	337,075	301,966	112%	1,405,139	0	139,820	
February	19	70	0	69	5,096	384	471	145	6,096	6,185	4,225	2,579	998	7,792	3,941	7	400	2,328	6,676	13,977	-491	336,584	301,966	111%	1,409,331	0	139,909	
March																												
April																												
May																												
June																												
July																												
August																												
September																												
October																												
November																												
December																												
YTD Total	34	136	0	170	11,343	719	923	324	13,309	13,479	10,008	5,857	1,826	17,691	7,705	14	975	6,923	15,617	31,170	-2,138	336,584	301,966	111%	1,409,331	0	139,909	

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 responses to both Recertification and Verification.

⁵ Data represents total residential electric customers.

⁶ Data represents total residential electric customers.

⁷ On April 13, 2023, pursuant to OP 189 of D-24-0655, the Investor-owned utilities (IOUs) submitted a compliance filing regarding annual estimation of CARE and FEPA-eligible customers and related information. D-24-0655 was approved by the California Public Utilities Commission (CPUC) on February 12, 2024. On January 18, 2024, Pacific Gas and Electric Company requested an extension of time to comply with the requirement, on behalf of the IOUs, which was subsequently granted.

⁸ Penetration Rate and Enrollment Rate are the same value.

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

CARE Program Table 3A - Post-Enrollment Verification Results (Model)								
San Diego Gas & Electric Company								
February 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	337,075	2,131	0.6%	1	11	12	0.6%	0.6%
February	336,584	2,130	0.6%	2	6	8	0.4%	0.4%
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
YTD Total	336,584	4,261	1.3%	3	17	20	0.5%	0.0%

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.

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								
February 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	337,075	247	0.1%	1	0	1	0.4%	0.0%
February	336,584	274	0.1%	0	0	0	0.0%	0.0%
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
YTD Total	336,584	521	0.2%	1	0	1	0.2%	0.0%

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.

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
February 2024

County	Estimated Eligible Households ¹			Total Households Enrolled ²			Enrollment Rate ³		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Orange	16,746	0	16,746	15,840	0	15,840	95%	0%	95%
San Diego	278,595	6,625	285,220	313,430	7,314	320,744	113%	110%	112%
Total	295,341	6,625	301,966	329,270	7,314	336,584	111%	110%	111%

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

² Total Households Enrolled includes submeter tenants.

³ Penetration Rate and Enrollment Rate are the same value.

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

CARE Program Table 5 - Recertification Results
San Diego Gas & Electric Company
February 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	337,075	11,587	3.4%	2,588	375	22.3%	0.1%
February	336,584	11,853	3.5%	2,042	272	17.2%	0.1%
March							
April							
May							
June							
July							
August							
September							
October							
November							
December							
YTD	336,584	23,440	7.0%	4,630	647	19.8%	0.19%

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
February 2024

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
211 SAN DIEGO ²		X			124	298
211 ORANGE COUNTY		X			-	-
ALPHA MINI MART	X				1	1
AMERICAN RED CROSS WIC OFFICES		X	X		-	-
BACKCOUNTRY COMMUNITIES THRIVING	X	X			-	-
CHALDEAN COMMUNITY COUNCIL		X	X		5	8
CHULA VISTA COMMUNITY COLLABORATIVE		X			2	2
COMMUNITY RESOURCE CENTER		X			-	-
ELDERHELP OF SAN DIEGO		X			-	-
HEARTS AND HANDS WORKING TOGETHER		X			-	-
INTERFAITH COMMUNITY SERVICES		X			-	-
LA MAESTRA FAMILY CLINIC		X			5	7
MAAC PROJECT		X		X	-	-
NEIGHBORHOOD HEALTH CARE		X			-	-
NORTH COUNTY HEALTH PROJECT, INC.	X				-	-
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	-
SAN YSIDRO HEALTH CENTERS		X			2	2
SCRIPPS HEALTH WIC		X			2	2
SOMALI BANTU ASSOCIATION OF AMERICA		X			-	-
SOMALI FAMILY SERVICES		X			-	-
UNION OF PAN ASIAN COMMUNITIES		X	X		-	-
VISTA COMMUNITY CLINIC		X			-	-
Total Enrollments					141	320

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

² Data for 211 San Diego is currently under review and the updated total, year-to-date, will be reported in a future report.

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

CARE Program Table 7 - Expenditures for Pilots and Studies
San Diego Gas & Electric Company
February 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
February 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				
April				
May				
June				
July				
August				
September				
October				
November				
December				
	N/A	112%	67%	N/A

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

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

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

[4] 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
February 2024**

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes that have 10% or more Disconnections [1]	ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG) [2]	ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in DAC
ZIP00001	N/A	92061	64%	92102	118%
ZIP00002	N/A	92122	65%	92113	123%
ZIP00003	N/A	92066	70%	91950	127%
ZIP00004	N/A	91905	71%	91910	128%
ZIP00005	N/A	92101	73%	92105	131%
ZIP00006	N/A	92060	79%	91945	136%
ZIP00007	N/A	92086	83%	92021	143%
ZIP00008	N/A	92078	92%	92114	148%
ZIP00009	N/A	92026	106%	91911	151%
ZIP00010	N/A	92025	107%	92173	152%

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

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

[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
February 2024

	Authorized Budget	Current Month Expenses	Year to Date Expenses	% of Budget Spent YTD
FERA Program:	Electric	Electric	Electric	Electric
Outreach	\$ 368,338	\$ 22,407	\$ 27,141	7%
Processing / Certification Re-certification	\$ 13,925	\$ 2,091	\$ 3,865	28%
Post Enrollment Verification	\$ 1,018	\$ 1,211	\$ 2,400	236%
IT Programming	\$ 54,636	\$ 1,012	\$ 2,217	4%
Pilot(s)	\$ -	\$ -	\$ -	0%
Studies	\$ 50,000	\$ -	\$ -	0%
Regulatory Compliance	\$ 47,180	\$ 2,679	\$ 6,567	14%
General Administration	\$ 75,915	\$ 5,429	\$ 12,120	16%
CPUC Energy Division	\$ 10,803	\$ -	\$ 9	0%
SUBTOTAL MANAGEMENT COSTS [1]	\$ 621,815	\$ 34,829	\$ 54,319	9%
FERA Rate Discount [2]	\$ 4,481,107	\$ 294,012	\$ 678,319	15%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 5,102,922	\$ 328,841	\$ 732,638	14%
Indirect Costs		\$ 5,498	\$ 11,899	

[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

	New Enrollment							Recertification				February 2024										
	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)	Enrollment		Total FERA Participants	Estimated FERA Eligible ⁵	Enrollment ⁶ Rate % (W/X)
	Inter-Utility ¹	Intra-Utility ²	Combined Leveraging ³ (B+C+D)	Online	Paper	Phone	Capitation											Combined (F+G+H+I)	Gross (K+O)			
January	0	5	0	328	20	22	3	373	33	77	2	112	253	0	147	128	490	-150	10,317	42,980	24%	
February	0	10	0	239	11	16	2	268	15	37	2	54	189	0	111	134	332	-156	10,161	42,980	24%	
March																						
April																						
May																						
June																						
July																						
August																						
September																						
October																						
November																						
December																						
YTD Total	0	15	0	567	31	38	5	641	48	114	4	166	442	0	258	262	962	-306	10,161	42,980	24%	

¹ Enrollments via data sharing between the JOLs.

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

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

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

⁵ On April 13, 2023, pursuant to OP 189 of D.21-06-015, the investor-owned

permanently extends the filing date for the annual estimates from December 31 to February 12 each year. On January 18, 2023, Pacific Gas and Electric Company requested an extension of time to comply with the requirement, on

behalf of the IOUs, which was subsequently granted.

^c 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 3A - Post-Enrollment Verification Results (Model) San Diego Gas & Electric Company February 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	10,317	64	0.6%	0	0	0	0.0%	0.0%
February	10,161	64	0.6%	0	0	0	0.0%	0.0%
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
YTD Total	10,161	128	1.3%	0	0	0	0.0%	0.0%

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.

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								
February 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	10,317	0	0.0%	0	0	0	0.0%	0.0%
February	10,161	0	100.0%	0	0	0	0.0%	0.0%
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
YTD Total	10,161	0	0.0%	0	0	0	0.0%	0.0%

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.

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
February 2024

County	Estimated Eligible Households ¹			Total Households Enrolled ²			Enrollment Rate ³		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Orange	2,331	0	2,331	418	0	418	18%	0%	18%
San Diego	39,417	1,232	40,649	9,503	240	9,743	24%	0%	24%
Total	41,748	1,232	42,980	9,921	240	10,161	24%	19%	24%

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

² Total Households Enrolled includes submeter tenants.

³ Penetration Rate and Enrollment Rate are the same value.

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

FERA Program Table 5 - Recertification Results
San Diego Gas & Electric Company
February 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	10,317	746	7.2%	0	59	0.0%	0.6%
February	10,161	424	4.2%	8	51	1.9%	0.5%
March							
April							
May							
June							
July							
August							
September							
October							
November							
December							
YTD	10,161	1,170	11.5%	8	110	0.7%	1.1%

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
February 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			2	5	
211 ORANGE COUNTY		X			-	-	
ALPHA MINI MART	X				-	-	
AMERICAN RED CROSS WIC OFFICES		X	X		-	-	
BACKCOUNTRY COMMUNITIES THRIVING	X	X			-	-	
CAMPESINOS UNIDOS INC (CUI) - CARE		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				-	-	
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					2	5	

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.