

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

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

Application 19-11-003

And Related Matters.

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

**ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY
(U 902 M) ON ENERGY SAVINGS ASSISTANCE, CALIFORNIA ALTERNATE RATES
FOR ENERGY, AND FAMILY ELECTRIC RATE ASSISTANCE PROGRAMS FOR
2022**

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May 1, 2023

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This report presents the 2022 program year results and expenditures for the San Diego Gas & Electric Company (SDG&E or Company) Energy Savings Assistance (ESA), California Alternate Rates for Energy (CARE), and Family Electric Rate Assistance (FERA) Programs. The purpose of this report is to consolidate activity for the ESA, CARE and FERA Programs, and provide the California Public Utilities Commission’s (Commission or CPUC) Energy Division with the necessary information to analyze the low income programs.

Respectfully Submitted,

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**ANNUAL REPORT ACTIVITY
ON ENERGY SAVINGS ASSISTANCE (ESA),
CALIFORNIA ALTERNATE RATES FOR
ENERGY (CARE), AND FAMILY ELECTRIC
RATE ASSISTANCE (FERA) PROGRAMS**

2022 RESULTS

TABLE OF CONTENTS

2022 ESA, CARE, AND FERA ANNUAL REPORT EXECUTIVE SUMMARY	1
1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY	3
1.1 Energy Savings Assistance Program Overview.....	6
1.2 Marketing, Education, and Outreach (ME&O).....	13
1.3 Energy Savings Assistance Program Customer Enrollment.....	19
1.4 Disability Enrollment Efforts.....	21
1.5 Leveraging Success, Including LIHEAP	26
1.6 Integration Success	29
1.7 Workforce Education & Training	35
1.8 Studies.....	37
1.9 Pilots	42
1.10 ESA Working Groups (WG) and Sub-Working Groups (SWG).....	44
1.11 Annual Public Meeting of ESA and CARE Program Prior Year Results	49
1.12 Multifamily Properties	49
CALIFORNIA ALTERNATE RATES FOR ENERGY ANNUAL REPORT	55
2. CARE EXECUTIVE SUMMARY Summary of 2022 Results	55
2.1 Participant Information	58
2.2 CARE Program Summary.....	63
2.3 CARE Program Costs	64
2.4 Outreach.....	68
2.5 Processing CARE Applications	83
2.6 Program Management.....	85
2.7 Pilots	85
2.8 Studies.....	86
2.9 CARE Restructuring Working Group.....	87

2.10	Miscellaneous Describe outreach efforts contained in Attachment 6 of the Joint Stipulation adopted in D.21-06-015.....	87
3.	CARE EXPANSION PROGRAM	87
3.1	Participant Information	87
3.2	Usage Information	88
3.3	Program Cost	88
3.4	Outreach.....	88
3.5	Program Management.....	90
	FAMILY ELECTRIC RATE ASSISTANCE PROGRAM ANNUAL REPORT	91
4.	FERA EXECUTIVE SUMMARY	91
4.1	Participant Information	92
4.2	Program Costs.....	95
4.3	Outreach.....	97
4.4	Processing FERA Applications.....	102
4.5	Program Management.....	103
5.	FUND SHIFTING.....	103
5.1	Report ESA Program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.....	103
6.	COMMONLY USED ACRONYMS	105
	Appendix A – Low Income Programs 2022 Ethnic Media Costs	107
	Appendix B – CARE TV Samples	108
	Appendix C - Structure ESA Email & Direct Mail Samples.....	109
	Appendix D – CARE & ESA Print Samples	110
	Appendix E – CARE and FERA Email Samples	113
	Appendix F – CARE and FERA Direct Mail Samples.....	115
	Appendix G – NMEC Results for ESA CAM.....	117
	Appendix H - ESA, CARE, and FERA Program Tables	119

2022 ESA, CARE, AND FERA ANNUAL REPORT EXECUTIVE SUMMARY

In Program Year 2022, San Diego Gas & Electric Company (SDG&E or Company) continued to serve the low- and moderate-income customers in the region with valuable offerings, tools and timely information to help reduce energy use, save money, and connect to additional resources. With the lingering impacts of COVID stay-at-home orders and other programmatic changes, 2022 was a year of transitions. SDG&E adapted to those changes by continuously ensuring customer and contractor safety and improving program processes, while serving as many eligible customers as possible. By year-end, the Energy Savings Assistance (ESA) Program installed over 100,000 energy savings measures and delivered energy education to more than 12,900 customers.

Senate Bill (SB) 756 was adopted in 2022, which increased ESA income eligibility for customers from 200% to up to 250% of the Federal Poverty Guidelines (FPG) and allowed for more than 84,000 additional households to qualify for no-cost weatherization and money saving measures.¹

SDG&E continued to explore leveraging opportunities with organizations that serve low to moderate income residential customers throughout the service territory. Outreach in 2022 included a focus on disability efforts, which resulted in substantial increases in both hosted and attended events, as well as customers reached. Program information and enrollment opportunities were extended to more than 60,000 customers at over 230 events.

Multiple ESA request for proposals (RFPs) were launched in 2022 to support pilot program activity and initiate the transition to a new single implementer model for 2023 energy

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

savings goals. SDG&E offered its Energy Savings Assistance Common Area Measures (ESA CAM) initiative for the fourth year, resulting in an increase in participation and treatment of 29 multifamily projects. To ensure continuity of service to the Multifamily sector, ESA CAM will continue through the end of June 2023, at which time the ESA Multifamily Whole Building (MFWB) Program will launch on July 2023 for eligible deed and non-deed restricted properties. In 2022, SDG&E completed the initial phases of the ESA Southern MFWB Program on behalf of Southern California Edison and Southern California Gas Company (Southern California IOUs). The Southern MFWB Program will provide multifamily sector services for in-unit, ESA CAM, and multifamily whole building measures.

In 2022, SDG&E completed the initial solicitation process for the implementation of its Pilot Plus and Pilot Deep pilot (Pilot), which is a Commission-adopted Energy Division staff proposal that focuses on providing customers with deeper household energy savings expected to range from 5-50%.² A successful bidder was not identified. A second solicitation process began in the fourth quarter of 2022 with resolution expected in the second quarter of 2023.

The California Alternate Rates for Energy (CARE) Program had over 71,000 new enrollments, ending the year with 355,600 income-qualified households enrolled, representing 123% of the eligible population and providing more than \$228.6 million in financial assistance.

For the first time, the Family Electric Rate Assistance (FERA) Program annual results are included in this annual report.³ In program year 2022, the FERA Program had 2,371 new enrollments, ending the year with 12,248 income-qualified households enrolled, representing

² Decision (D.) 21-06-015 at 128.

³ Pursuant to Ordering Paragraph (OP) 26 of D.21-06-015, “The Family Electric Rate Assistance program proceeding will be consolidated with the California Alternate Rates for Energy and the Energy Savings program proceeding.” Further, beginning with the 2022 annual report, the Commission approved the proposal to “combine the FERA annual report with the ESA and CARE annual reports to reduce regulatory burden and reporting.” *Id.* at 435.

28% of the population and providing more than \$4.7 million in financial relief for moderate-income customers.

ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY

Summary of 2022 Results

The ESA Program offers no-cost weatherization services, energy efficient lighting, energy efficient appliances, energy education, and other services to income-qualified customers to reduce energy consumption and costs, while improving health, comfort, and safety. To qualify for the ESA Program, a residential customer's household income must be at, or below, 250% of FPG. The ESA Program is available to all housing types regardless of whether customers rent or own and is currently comprised of two programs/initiatives: (1) the ESA Main Program for single family (SF) homes, mobile homes (MH), and multifamily (MF) in-unit, and (2) the ESA CAM initiative for common areas of multifamily properties. As a result of D.21-06-015, SDG&E continued efforts to launch the new ESA Pilot Plus and Pilot Deep Program. This report provides information on SDG&E's ESA Program accomplishments and expenditures for program year 2022.

The Commission authorized an annual treatment target of 13,760 homes for program year 2022.⁴ At the end of 2022, SDG&E had treated 12,662 homes, or 92% of the 2022 annual treatment target. ESA Program expenditures totaled \$15,950,933 or 53% of the 2022 authorized budget.⁵ Of the total forecasted ESA Program energy savings, including the ESA CAM

⁴ *Id.* at Attachment 1, Table 6.

⁵ Includes ESA CAM expenditures and Pilot Plus and Pilot Deep Programs.

initiative, SDG&E achieved 1,638,311 kWh savings, 1,918 therm savings, and 133 kW demand savings.

In 2022, SDG&E's ESA CAM initiative continued to offer ESA CAM to deed restricted multifamily properties, treating a total of 29 multifamily properties, which was 32% higher than the number of treated properties in 2021. ESA CAM spending was \$1,453,499, or 34% of the authorized 2022 budget spent.⁶ ESA CAM energy savings achieved 358,265 kWh savings, 1,488 therm savings, and 54 kW demand savings.

The Commission directed the Investor-Owned Utilities (IOUs) to use unspent ESA Program funds to offset future revenue collections.⁷ Consistent with this directive, for program year 2022, SDG&E partially offset its revenue collections by \$13,600,000 using ESA Program unspent and uncommitted electric funds of \$9,500,000 and gas funds of \$4,100,000.⁸

SDG&E's ESA Program electric and gas balancing account as of December 31, 2022 had an overcollection of \$20,656,506. In accordance with D.21-06-015, SDG&E has committed electric and gas unspent funds of \$2,808,028 for ESA CAM. Therefore, the total remaining unspent and uncommitted funds available in the electric and gas funds to offset future collections as of December 31, 2022 is \$17,848,478. See ESA Table 12 in Appendix H.

⁶ D.21-06-015 at 369 (“We also require the IOUs to carry-forward any unspent and uncommitted CAM funding from the original allocation in D.17-12-009 remaining as of June 30, 2021 into the remainder of PY 2021 and 2022.”). The unspent funds remaining at the end of December 31, 2021 was \$4,261,527 to be used for 2022.

⁷ D.21-06-015 at OP 114.

⁸ See SDG&E Advice Letters 3928-E, effective January 1, 2022 which requested the electric revenue requirement. See also SDG&E Advice Letter 3027-G-A, effective January 1, 2022 which requested the gas revenue requirement.

ESA Program Balancing Accounts Unspent Funds Available			
As of December 31, 2022			
	Balancing Account Unspent / Over-collection	Unspent / Committed ⁹	Unspent / Uncommitted ¹⁰
Electric	\$10,952,666	(\$2,054,065)	\$8,898,601
Gas	\$9,703,840	(\$753,963)	\$8,949,877
Total funds available to offset future revenue collections	\$20,656,506	(\$2,808,028)	\$17,848,478

Procedural Background

On June 7, 2021, the Commission issued D.21-06-015, which approves the applications of the IOUs and sets forth the parameters for the administration of the CARE, the FERA, and the ESA Programs for the 2021-2026 program cycle. The Decision approved the Energy Division’s ESA Program redesign concept on a pilot basis (ESA Pilot Plus and Pilot Deep Program); required the IOUs to establish effective coordination efforts among low income and clean energy programs; approved a new measure mix for the program that focuses on deeper energy savings, while allowing the IOUs flexibility in managing the portfolio by updating the measure mixes through monthly and annual reporting; established cost effectiveness guidelines; approved and directed tailored marketing and outreach efforts to reach the program goals, including broadband outreach; approved and directed targeted leveraging efforts to reach the program goals, including with local, state, and federal agencies, water and telecommunication agencies, as well as other low income programs; established new Northern and Southern MFWB programs to include

⁹ D.21-06-015 directs the IOUs to carry-forward all unspent and uncommitted ESA common area measures funding as of June 30, 2021 into the remainder of program year 2021 and 2022.

¹⁰ SDG&E will partially offset its gas revenue collections in 2023 by \$2,000,000. See SDG&E Advice Letter 3137-G, effective January 1, 2023 which requested the gas revenue requirement.

multifamily in-unit and ESA CAM for deed and non-deed restricted properties; established an ESA working group to continuously monitor program progress and make recommendations; modified the fund shifting rules; modified the administrative cost cap; and directed unspent uncommitted funds to offset revenue collections to avoid large accumulations of unspent funds balances.

On September 23, 2021, SB 756 was approved for home weatherization for low income customers. Effective July 1, 2022, the bill defines low income customers as persons and families whose household income is at or below 250% of the federal poverty level and would prohibit the Commission from increasing the authorized budgets for the program based on that expansion of income eligibility.

1.1 Energy Savings Assistance Program Overview

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

Per D.21-06-015, SDG&E began the process of transitioning the ESA Program from a model of homes treated to one focused on providing low income customers with measures that increase their energy savings and improve their health, comfort and safety. As part of this transition, in 2022, SDG&E conducted a solicitation for the delivery of the Main ESA Program for single family and mobiles homes, beginning in 2023.¹¹ SDG&E selected Richard Heath and Associates (RHA) to implement the Main ESA Program's Bundled Services, which includes Outreach, Enrollment, Assessment, Weatherization, Appliance Installation, Inspections and Natural Gas Appliance Testing (NGAT). SDG&E also solicited for HVAC and Water Heater Repair and Replacement Services (R&R) but did not receive a qualifying bid and is resoliciting

¹¹ Per OP 128 of D.21-06-015, SDG&E will continue to offer multifamily in-unit service through the Main ESA Program until multifamily in-unit transitions to the ESA MFWB Program.

for those services in 2023. SDG&E also worked with its internal operations team to identify opportunities to leverage the new Auditing Tool being offered with the Energy Efficiency (EE) Home Energy Rating System (HERS) Program as part of the new ESA Program Audits for ESA Program delivery, and set-up its systems to identify Basic and Plus measure installations. SDG&E intends the full transition to the new program design to occur in 2023. The table below provides a summary of the Main ESA Program expenses.

Main ESA Program Summary¹²			
	2022 Authorized Budget / Forecasted Planning Assumptions	2022 Actual	%
Total Budget	\$24,305,647	\$14,369,754	59%
Administrative Budget ¹³	\$7,490,144	\$4,053,722	54%
Homes Treated	13,760	12,662	92%
kWh Saved	2,955,161	1,280,046	43%
kW Demand Reduced	428	79	.18%
Therms Saved	127,171	430	.003%
GHG Emissions Reduced (Tons)	N/A	706	N/A

The ESA CAM initiative offers income qualified deed-restricted multifamily property owners natural gas and electric weatherization services, energy efficient lighting, energy efficient appliances, and other services at no cost. The current ESA CAM contract was extended to

¹² Includes MF in-unit and SF and MH treatments.

¹³ D.21-06-015 at 316 states “We approve a cap on administrative expenses for the ESA program at either 10 percent of total program costs, or the IOU’s historical five-year average spend on administrative costs as a percentage of total program costs, whichever is greater. We phase out the use of the historical five-year average spend such that the IOUs must propose to spend no more than 10 percent of total program costs on administrative costs starting in program year 2024.”

continue to serve multifamily CAM customers until the ESA MFWB Program is operational for customer enrollment. The table below provides a summary of the 2022 activity:

ESA MF CAM Program Summary			
	2022 Authorized Budget / Forecasted Planning Assumptions¹⁴	2022 Actual	%
Total Budget	\$4,261,527	\$1,453,499	34%
Administrative Budget ¹⁵	\$426,153	\$89,892	21%
MF Properties Treated	40	29	73%
kWh Saved	N/A	358,265	N/A
kW Demand Reduced	N/A	54	N/A
Therms Saved	N/A	1,488	N/A
GHG Emissions Reduced (Tons)	N/A	206	N/A

D.21-06-015 directed SDG&E to lead the Southern IOUs (SDG&E, Southern California Edison Company (SCE), and Southern California Gas Company (SoCalGas)) in implementing a third party Southern MFWB Program selected through a competitive solicitation process, that included a one stage request for proposal (RFP), followed by two steps (RFP response + Interview). The Southern MFWB Program is intended to provide energy efficiency services to multifamily customers, including in-unit and common area measures, for a holistic approach to treating the whole building.

¹⁴ See Table 2 of SDG&E Advice Letter 3820-E/3004-G, effective August 2, 2021 for 2022 MF CAM budgets and property treatment targets, which was approved by the Commission’s Energy Division via disposition letter dated September 24, 2021.

¹⁵ D.16-11-022 capped administrative costs at 10% for the ESA CAM. See D.16-11-022 at 210. D.19-06-022 directed the IOUs to set aside 10% of total ESA bridge budget for administrative program costs; mainstream energy efficiency programs also impose an administrative cost caps of 10 percent. See D.19-06-022 at 12.

The two lead utilities, SDG&E for the Southern, and Pacific Gas and Electric Company (PG&E) for the Northern, selected The Mendota Group, LLC to serve as the Independent Evaluator (IE) tasked with monitoring and reporting on the ESA MFWB Program solicitations. SDG&E and PG&E also assembled a statewide Procurement Review Group (PRG) to oversee the IOUs' ESA MFWB Program solicitation process, review procedural fairness, and help promote transparency. The PRG consisted of non-financially interested parties, including Energy Division staff and the CPUC's Public Advocates Office. The PRG's oversight included examining overall procurement prudence and providing feedback during all solicitation stages. SDG&E held regular monthly meetings with the PRG during the solicitation process and worked with the IE to confirm that all aspects of the process were consistent with the guidelines. SDG&E and PG&E collaborated on the overall solicitation process but issued separate solicitations for the Northern and Southern ESA MFWB programs. For purposes of jointly administering the shared aspects of the solicitation, the two utilities combined efforts until receipt of Bidder proposals for the respective programs. Each utility then separately evaluated Bidder proposals, selected implementers, and conducted contract negotiations. SDG&E's Solicitation outreach strategy focused on three primary methods of informing and educating bidders about the solicitation opportunity via the web, email, and through Diversified Business Enterprise (DBE) outreach events. The web-based portion included the Company's dedicated Energy Savings Assistance Program Solicitations web site. The site contains a description of SDG&E's ESA MFWB Program solicitation process, all four IOUs' ESA Solicitation Plans, the schedules for the Company's ESA solicitations, and a host of tools and resources for bidders. SDG&E held three ESA MFWB Program Bidder events to review the Solicitation Objectives and provide background on our current ESA Programs. Bidder proposals were due on April 13,

2022, and through a competitive Solicitation process, SDG&E selected Richard Heath & Associates, Inc. (RHA) to implement the Southern ESA MFWB Program in SDG&E, SCE, and SoCalGas’ service territories for Program Years 2023 - 2026. A Tier 2 Advice Letter was filed on November 30, 2022 and approved on December 21, 2022, with an effective date of December 30, 2022. RHA received their Notice to Proceed (NTP) letter on December 30, 2022, with an effective date of January 1, 2023. The Southern ESA MFWB Program will be open for customer enrollment on July 1, 2023 across all three service territories. To avoid a lapse in services to eligible multifamily customers, a transition period was directed in the D.21-06-015 to support and fund pre-launch activities. Enrollment in the new program is expected to begin Q3 of 2023 and will be managed in accordance with a Co-funding Agreement amongst the southern IOUs (SDGE 20%, SCE 31% and SCG 49%).

ESA Southern MFWB Program Summary			
	2022 Authorized Budget / Forecasted Planning Assumptions	2022 Actual	%
Budget	N/A	N/A	N/A
Administrative Budget	N/A	N/A	N/A
MF Properties Treated	N/A	N/A	N/A
kWh Saved	N/A	N/A	N/A
kW Demand Reduced	N/A	N/A	N/A
Therms Saved	N/A	N/A	N/A
GHG Emissions Reduced (Tons)	N/A	N/A	N/A

ESA Pilot Plus and Pilot Deep Program (Pilot)

The ESA Pilot Plus and Pilot Deep Program (Pilot) is the Commission’s approved Energy Division Staff Proposal to yield deeper home energy savings with energy savings targets expected between 5% to 50%.¹⁶ The Pilot provides more advanced energy savings measures tailored to customer needs that complement and build upon the ESA Main Program measure packages. The Pilot Plus package will provide and/or replace certain equipment and appliances plus load shifting and electrification measures that should reduce annual energy usage by 5 to 15%. The Pilot Deep package will offer more advanced measures including HVAC, appliances, and hot water measures that should reduce annual energy usage by 15 to 50%. The Pilot summary table below reflects cost associated with the activities conducted in 2022 in support of the pilot implementation in 2023.

ESA Pilot Plus and Pilot Deep Program Summary			
	2022 Authorized Budget / Forecasted Planning Assumptions	2022 Actual	%
Total Budget	\$1,526,683	\$127,680	8%
Administrative Budget ¹⁷	\$152,668	\$127,680	83%
Homes Treated	N/A	N/A	N/A
kWh Saved (Plus = 5-15 Percent)	N/A	N/A	N/A
kWh Saved (Deep = 15-50 Percent)	N/A	N/A	N/A
kW Demand Reduced	N/A	N/A	N/A
Therms Saved (Plus = 5-15 Percent)	N/A	N/A	N/A
Therms Saved (Deep = 15-50 Percent)	N/A	N/A	N/A
GHG Emissions Reduced (Tons)	N/A	N/A	N/A

¹⁶ See SDG&E, Energy Savings Assistance Program (ESAP) Pilot Plus and Pilot Deep (PP/PD) Solicitation, available at <https://www.sdge.com/pilot-plus-and-pilot-deep-20-request-proposal>.

¹⁷ D.21-06-015 at Attachment 2 states “General Administration – Funds may be allocated for administration of the pilot, not to exceed 10 percent of the pilot budget.”

Single Family Affordable Solar Homes (SASH)/ Multifamily Affordable Solar Housing (MASH)

The Table below represents any cost associated with unspent SASH and MASH Unspent Funds that were allocated to the ESA Program. There was no activity in 2022.

Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Unspent Funds (Electric IOUs Only)¹⁸			
	2022 Authorized	Actual to Date	%
Total Budget	N/A	N/A	N/A

Provide narrative summary of SASH/MASH budget augmentation regarding where funds were used in the ESA Program.

As of 2022, SDG&E has not transferred any unspent Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Unspent Funds to the ESA Program. A joint utility advice letter reflecting the transfer of unspent funds to the IOUs is expected in the second quarter of 2023 and the joint IOUs group has kept Energy Division appraised of the advice letter timeline.

¹⁸ D.15-01-027 at OP 12 states “The Program Administrators shall ensure that program expenditures in each utility’s service territory do not exceed the total authorized budget amounts over the duration of the programs. The program incentive budgets will be available until all funds are exhausted or until December 31, 2021, whichever occurs first. Any money unspent and unencumbered on January 1, 2022, shall be used for ‘cost-effective energy efficiency measures in low income residential housing that benefit ratepayers,’ as set forth in Public Utilities Code Section 2852(c)(3).” The electric IOUs plan to file a Joint Advice Letter for disposal of unspent funds from the SASH and MASH programs to the ESA Program. Joint IOUs plan to file Advice Letter in second quarter of 2023. After the Advice Letter is filed, budget authorization will be pending per Energy Division disposition of the Advice Letter.

1.2 Marketing, Education, and Outreach (ME&O)

1.2.1 Provide a summary of the segmentation strategy employed, (i.e., tools and analysis used to segment households, how households are segmented and prioritized for treatment, and how this information is communicated to the contractor/Community Based Organizations (CBO)).

SDG&E understands the importance of segmentation, as it enables SDG&E to target customers and gain insights into barriers and solutions. When organizing SDG&E's residential population into detailed profiles of individual segments, there are several ways to describe them – by energy-related attitudes and behaviors, including demographics, energy conservation behaviors, media consumption habits, lifestyle preferences, mobile usage, propensity to engage, and more.¹⁹

SDG&E used a variety of factors to identify customers more likely to qualify for the ESA Program, which included the most current Athens Research Study²⁰ and SDG&E's Residential Segmentation model. The purpose of this model was to modernize SDG&E's residential customer segments to account for market changes and ever-changing customer dynamics. This segmentation allowed for targeted messaging to customers with high potential for eligibility. As discussed in further detail herein, a series of communication tactics such as direct mail and outbound calling, were deployed to potentially eligible customers within specific neighborhoods.

An example of SDG&E's multi-touch integrated approach is the 2022 ESA Program targeted marketing campaign, in which SDG&E sent over 995,000 emails and/or direct mail postcards to currently enrolled and potentially eligible CARE and FERA customers, encouraging

¹⁹ Customer segmentation from marketing demographic perspective.

²⁰ A.19-11-003, Compliance Filing of Pacific Gas & Electric on Behalf of Itself, Southern California Gas Company, San Diego Gas & Electric Company, and Southern California Edison Company Regarding Annual Estimates of CARE Eligible Customers and Related Information (February 14, 2022). Athens Research produces the report that is included as part of this compliance filing. The analysis and subsequent report for this compliance filing is produced by Athens Research.

them to also save through the ESA Program. Following the email and/or postcard, SDG&E provided a canvassing list to ESA Program outreach contractors with ESA Program penetration rates and PRIZM code information for each zip code. PRIZM codes are third party-generated customer segments based on socioeconomic data. See Appendices B – F, attached hereto, for samples of this campaign. In December 2022, to streamline the customer acquisition process, SDG&E created a lead form for email campaigns which immediately sent customer information to outreach contractors if a customer indicated interest. One email campaign generated over 515 leads in 2022. SDG&E hopes to expand on this practice in 2023.

SDG&E continued its collaboration with the Energy Solutions Partner Network, which helps educate and enroll customers in low income programs utilizing a variety of tactics including messaging through email and social media channels, posting information on their websites, providing booth space at events, and hosting enrollment day fairs at their locations. In 2022, the Energy Solutions Partner Network leveraged both traditional messaging (e-mail, newsletters) and social media platforms (Facebook, Twitter, Instagram, NextDoor, etc.) to effectively deliver tailored SDG&E program messaging to customers from organizations they trust.

Additionally, SDG&E strategically identified Community Based Organizations (CBOs) within and outside of its Energy Solutions Partner Network to further reach areas and various pockets within low income populations throughout its service territory. These areas include hard-to-reach rural, multi-cultural, multi-lingual, and Access and Functional Need (AFN) communities. SDG&E also coordinated outreach tactics with CBOs to promote the CARE, FERA, and ESA Programs to customers, which deepens customer trust in the utility and creates more enrollment opportunities. These outreach tactics included presentations, events, trainings,

and messaging to increase awareness and drive enrollments in the ESA Program. As part of the customer engagement outreach plan, SDG&E educated partners with training materials on the ESA Program, including how to utilize the CARE, FERA, and ESA Programs' online application to streamline the enrollment process for their organization.

SDG&E also worked with these partners to provide education and engagement opportunities at approximately 360 presentations and events throughout its service territory. To further support customers at events in multicultural/multilingual communities, SDG&E secured bilingual representatives to communicate effectively with non-English speaking customers, who are often part of SDG&E's hardest-to-reach populations. The ability for CBOs to penetrate these harder-to-reach customer segments continues to be valuable in generating program enrollments.

1.2.2 Provide summary of how customers are targeted/referred to implementation Pilots (Pilot Plus and Pilot Deep and Building Electrification)

SDG&E's Pilot Plus and Pilot Deep Program did not launch in 2022. It is expected to launch as Pilot Plus and Pilot Deep 2.0 in 2023.

The customer targeting for participation in the Pilot Plus and Pilot Deep 2.0 program will include single family, and mobile home low income, high usage customers defined as CARE or FERA customers whose electric usage reached 300% of baseline 3 or more times within the prior 12 months, and/or gas usage reached 200% of baseline 3 or more times within the prior 12 months and reside in climate zones with the most extreme weather conditions.

Targeted outreach will be prioritized based on need states and characteristics such as age/vintage of home, location in Tribal or disadvantaged communities, enrollment in Medical Baseline program, classification as Disabled or Senior, or those that have experienced service disconnections.

1.2.3 Provide a summary of the customer segmentation strategies employed (i.e., tools and analysis used to identify customers based on energy usage, and other factors) and how these customer segments are targeted in program outreach.

In 2022, SDG&E continued to utilize Residential Segmentation data overlaid with the Athens Research Study. The Residential Segmentation data are generated by a predictive model which leverages socioeconomic information and consumption behavior to identify key drivers and apply machine learning algorithms to generate predictive scores and identify customers who are likely to be eligible for the programs. The socioeconomic rank includes income, household size, education, occupation and home value as well as Life Stage Groups and Social Groups.

Using this information, SDG&E has identified distinct segments among residential customers based on various factors such as:

- Motivations for adopting new behaviors, including underlying values that drive decisions;
- Attitudes toward energy efficiency and environmental issues;
- Affinity for new technologies and energy management tools;
- Technology and communication tools used (internet, smart phones, etc.); and
- Limited or specialized communications needs and preferences.

In addition to mass market awareness tactics such as TV and bill inserts, SDG&E launched ESA-specific tactics, which focused on communicating ESA benefits to eligible customers. The campaign ran in English, Spanish, and Asian languages and included TV (PSA-style interviews), digital (including paid search), email and direct mail. See Appendices A-E of this report for examples.

1.2.4 Describe how the current program delivery strategy differs from previous years, specifically relating to Identification, Outreach, Enrollment, Assessment, energy Audit/Measure Installation, and Inspections.

In 2022, SDG&E continued many of its current targeted marketing strategies, including utilizing residential segmentation and targeted campaigns to CARE high usage customers.

Additionally, SDG&E conducted a smart thermostat campaign during the summer months. As part of the Main ESA Program Solicitation for program implementation in 2023, SDG&E requested proposals from bidders focused on supporting SDG&E's targeted enrollment strategies, which included the use of outreach based on customer need and needs state, the use of voluntary customer audits and customer kits for those customers not needing an in-home visit. The full transition to this model will occur in 2023.

1.2.5 Describe Tribal outreach activities, including a summary of the biannual Tribal meetings, and an up-to-date list of Tribal contacts, including progress towards meeting goal for relationships with non-federally recognized tribes.

D.21-06-015 directed the IOUs to contact each tribe and/or conduct individual meetings with tribes in their territory at least once every 6 months;²¹ SDG&E plans to continue outreach and collaboration with all interested tribes in its service territory year-round. The meeting topics are determined by the priorities of tribal elected officials. To date, SDG&E has not met with non-federally recognized tribes. In Q1, Tribal Relations participated in five Southern Indian Health Council community events in the communities of Campo, Manzanita, La Posta, Barona and Viejas to reach more low income tribal members.

In accordance with D.21-06-015, SDG&E confirmed that it has an up-to-date list of tribal contacts. Due to customer privacy concerns, SDG&E cannot provide contact names as requested according to privacy protocols as that information is not public.

²¹ D.21-06-015 at 455.

1.2.6 Track Costs of AB 793 related Energy Management Technologies programs (identify all of the programs or initiatives that will be able to benefit from the availability of the end-use and electric usage profiles, and to coordinate with the relevant proceedings so that the relevant costs can be considered in those proceedings' cost-effectiveness decision-making), including costs for Energy Education

Assembly Bill (AB) 793, among other requirements, directed the IOUs to incorporate energy management technologies into the ESA Program measure offerings. The following ESA Program activities were conducted in 2022 related to energy management technologies and costs:

As part of contractor training for the ESA Program, Energy Specialists are trained on SDG&E's My Account offerings so they can walk customers through the website during the In-Home Education visit. This training ensures that customers are being educated on programs and tools available for them to manage their energy, and to benefit from the services offered through My Account. Energy Savings opportunities are also included in the statewide Energy Savings Assistance Program Energy Education booklet, which is reviewed with the customer at the time of the home visit. Additionally, in 2022, the ESA Program leveraged the in-home energy education process to inform customers about the Power Saver Rewards program. In 2022, SDG&E spent \$397,090 in In-Home Energy Education costs.

1.2.7 Managing Energy Use

Outreach & Assessment contractors in the field offer customers energy use management tools and assistance. As mentioned above, during in-home visits, customers are guided through the registration process if not already enrolled in My Account and are provided with educational resources to be utilized for energy management through the My Account tool. Additionally, Outreach & Assessment contractors review customers' bills to provide them with information on how to best manage their energy use as they walk through the in-home assessment. For example, as a contractor examines the water heater, he or she will guide the customer on setting the

appropriate water temperature of the water heater to help reduce costs. As part of the installation of a smart thermostat, ESA contractors educate customers on how to set up the smart thermostat to improve energy usage. In 2022, SDG&E spent \$33,735²² on the installation of smart thermostats.

1.2.8 Services to Reduce Energy Bill

To help educate customers on their energy use, customers can complete a no-cost online five-minute Home Energy Checkup through the Ways-to-Save Home Energy Survey, which is available through My Account. By answering a few basic questions on how they use energy, the survey identifies which of our programs, tips, and tools can assist customers to save energy. The customized tips range from conservation to no-or-low-cost upgrades to long-term solutions that help reduce energy use and save money.

1.3 Energy Savings Assistance Program Customer Enrollment

1.3.1 Report the number of customers or households treated, the IOU specific 2022 household treatment target, and the percentage of households treated. If the IOU was not able to reach the total household target, please explain.

SDG&E's household treatment target for 2022 was 13,760. SDG&E treated a total of 12,662 or 92% of the target. A contributing factor in the lower than expected treated was the number of potential participants who were unreachable or who experienced scheduling conflicts, being 60% higher than 2021. For Program year 2023, SDG&E will be transitioning from a multiple-implementer to a single implementer model, utilizing one ESA Program contractor for all services, apart from HVAC and Water Heater Repair and Replacement Services. As part of the transition, current outreach and enrollment contractors began to ramp

²² Includes ESA Main and ESA CAM expenditures.

down enrollments earlier than in previous years in preparation for the change, causing the program to fall slightly short of its goal. Program services for eligible customers were prioritized based on health, comfort and safety needs, such as water heater or furnace repair and replacements, ensuring customers with the greatest needs continued to receive services.

1.3.2 Please summarize new efforts to streamline customer enrollment strategies, including efforts to incorporate categorical eligibility and self-certification.

The increase in the ESA Program income guidelines from 200% to 250% of the FPG directly matches with FERA income requirements, enabling SDG&E to improve coordination efforts between the FERA Program and the ESA Program. Similar to the process used for CARE, customers self-certifying their eligibility for the FERA Program are used as leads for ESA Program contractors. SDG&E also continued its targeted self-certification enrollment strategies (based on PRIZM codes) to conduct target marketing campaigns and contractor canvassing efforts for CARE and FERA qualified households. Additionally, categorical eligibility based on qualifying programs is used to simplify the enrollment income verification and data collection process for customer enrollment. SDG&E began efforts to streamline enrollment for program year 2023. These changes will include the transition to the new program delivery model²³ and transitioning to an implementer model to deliver program services for Outreach and Enrollment, Weatherization, Appliance Installation, Natural Gas Appliance Testing (NGAT) and natural gas appliance inspections. The new program implementer began in January 2023, and integration of the new program design will continue throughout 2023.

²³ D.21-06-015 at OP 57.

1.3.3 If the IOU has failed to meet its annual energy savings goal, please provide an explanation of why the goal was not met. Explain the programmatic modifications that will be implemented in order to accomplish future annual energy savings goals.

In D.21-06-015, the Commission directed the utilities to transition from the previous programmatic goal of number of homes treated to energy savings achieved. The reason SDG&E fell short of the savings goal in 2022 was primarily due to the existing program contracts working under the previous program directive while the program transitioned to the new, single implementer program delivery model. Additionally, SDG&E conducted an update to previously filed savings values to provide a better documented and more consistent approach to the savings values for ESA Program measures. With the transition to goals based on energy savings achieved, this savings value update provides an improved and more transparent foundation for managing and reporting savings. As a result of updating the source of the savings, however, the program saw a change in the reported annual savings values for some measures.

As part of SDG&E's transition, SDG&E conducted solicitations for the Main ESA Program and for the ESA MFWB program. In compliance with D.21-06-015, SDG&E included implementer compensation models that were directly tied to achieving energy savings. The compensation structure will ensure that future program implementation is focused on achieving greater energy savings.

1.4 Disability Enrollment Efforts

1.4.1 Provide a summary of efforts to which the IOU is meeting the 15% enrollment goal.

In 2022, SDG&E conducted outreach efforts with organizations serving individuals with a disability (listed below) or other AFN to improve ESA Program engagement. Throughout the year, SDG&E partnered with these organizations in more than 265 events and presentations reaching over 61,000 customers, a substantial increase from 2021. These events and

presentations were provided to CBO staff and volunteers, so they could assist community members that utilize their services. Additional information about these community organizations and SDG&E’s joint outreach efforts can be found in Section 1.4.2 below. SDG&E partnered with the following organizations to better reach individuals with disabilities:

211 Orange County
211 San Diego
Access to Independence
Access Youth Academy
American Red Cross WIC
Black American Political Association of California (BAPAC)
Brazilian Institute for Arts and Culture - BIAC
Chula Vista Chamber of Commerce
Chula Vista Community Collaborative (CVCC)
City of San Marcos Senior Activity Center
Cool Zones-County of San Diego
CREER (Comunidad Y Familia)
Cystic Fibrosis Foundation
Deaf Community Services
Diabetes Research Connection
D'Vine Path
ElderHelp of San Diego
Epilepsy Foundation of San Diego
Fallbrook Senior Center
Family Assistance Ministries
Feeding San Diego
Foundation For Senior Care
GRID Alternatives San Diego
Hearts and Hands Working Together
Helping Paws Foundation
Home Start Inc
Horn of Africa
House of Italy San Diego
House Of Peru
Julian Cuyamaca Resource Center, Inc.
Kalusugan + Kalakasan Center for Health & Wellness
La Jolla Community Center
La Maestra Community Health Centers
Laguna Niguel Family YMCA
Lawrence Family Jewish Community Center

Meals on Wheels San Diego County
Metropolitan Area Advisory Committee (MAAC)
Mitchell Thorp Foundation
Neighborhood House Association (NHA)
North County Health Project, Inc.
Peninsula Shephard Center
Persian Cultural Center
Ramona Senior Center
Resounding Joy
San Diego Center for the Blind
San Diego Chinese Historical Museum
San Diego Council on Literacy
San Diego County HHSA - Health and Human Services Agency
San Diego Futures Foundation
San Diego Hunger Coalition
San Diego Regional East County Chamber of Commerce
San Diego Seniors Community Foundation
San Diego State (SDSU) Research Foundation
San Diego Unified School District - Cesar Chavez Elementary School
San Ysidro Health Center
Somali Family Service of San Diego
South Bay Unified School District - SunnySlope Elementary School
Southern Caregiver Resource Center
Southwestern College Foundation
St. Madeleine Sophie's Center
The Arc of San Diego
The Vision of Children
Tricity Food Pantry
Valley Center CERT/ Valley Center ARC
Vista Community Clinic

1.4.2 Describe how the Energy Savings Assistance Program customer segmentation for ME&O and program delivery takes into account the needs of persons with disabilities.

SDG&E’s outreach activities are designed to specifically support the needs of customers with disabilities. SDG&E has worked diligently to partner with various CBOs, including non-profit organizations, community clinics, and county/city agencies that provide direct services to this customer segment, providing education and engagement opportunities in support of the ESA Program. Partner segments with outreach activities included:

Hearing & Vision

San Diego Center for the Blind

San Diego Center for the Blind promoted SDG&E's energy solutions and services that include Low Income and Medical Baseline programs in English and Spanish. A series of presentations on SDG&E programs and services including Customer Assistance Programs and Public Safety Power Shutoff (PSPS) was given to multiple constituent groups of San Diego Center for the Blind.

Deaf Community Services

On a monthly basis, Deaf Community Services (DCS) shared marketing materials and messaging through their communication channels to promote programs that affect or benefit the deaf community in SDG&E's service territory. DCS has provided American Sign Language (ASL) interpretation for the internal "See Me, Hear Me," events at SDG&E and has an active Service Agreement to provide ASL interpreting services for key external events and customer notifications

Mental & Health & Services

Several Energy Solutions Partners offered services supporting individuals with mental health challenges including Home Start and San Ysidro Health Centers. Partners attended specialized SDG&E-hosted presentations and trainings on CARE, FERA and ESA Programs, and monthly messages were posted on social media.

Senior Centers

Outreach Advisors conducted presentations to Senior Centers throughout San Diego, including ElderHelp of San Diego, San Diego Oasis, Ramona Senior Center and Bayside Community Center, among others, with information on SDG&E's Customer Assistance

Programs and offerings. Monthly messages were posted through the partners various social media channels.

1.4.3 Identify the various resources the IOUs utilize to target the disabled community and the enrollments as a result.

SDG&E's ME&O communications are designed to specifically address the needs of its customers with disabilities as detailed below.

For customers who are blind/low vision, SDG&E has provided large-font printed collateral materials and will provide large-font customer bills as requested. Additionally, these resources are available on a dedicated landing page for individuals with access and functional needs.

SDG&E partners with more than 200 CBOs serving customers with access and functional needs to actively promote the ESA Program. These partners provide customized messaging through email, e-blasts, newsletters, social media posts such as Facebook, Twitter, and Instagram, as well as at events, workshops and trainings with each organization's staff. These efforts led to 6.5% of SDG&E's ESA Program enrollments identified as customers with disabilities for 2022.

1.4.4 If participation from the disabled community is below the 15% goal, provide an explanation why.

In 2022, SDG&E's enrollment numbers from individuals who are disabled totaled 6.5% of the goal. The percentage reflects the number of customers who have self-identified as disabled, are participants of Medical Baseline, or who have been visually identified during the enrollment process. The challenge with reaching this goal is in part because of the limitations in how identification of a customer who is disabled occurs during the enrollment process. Customers are not required to provide disability status and often customers are not comfortable doing so. Contractors are reliant on customers to provide disability status or visual indicators,

which are not always apparent. Additional details regarding enrollment of customers who are disabled and those with other access and functional needs please see Appendix H, Table 17.

As in previous years, SDG&E continued to partner with local organizations serving customers with disabilities and other access and functional needs, such as Deaf Community Services, 211 San Diego, and others to increase enrollments within its service territory. In addition to leveraging existing partnerships, in 2022, SDG&E Outreach proactively added 10 CBOs to further support and reach individuals with an access and functional need.

1.5 Leveraging Success, Including LIHEAP

Decision 08-11-031 defines leveraging as “an IOU’s effort to coordinate its ESA Programs with programs outside the IOU that serve low income customers, including programs offered by the public, private, non-profit or for-profit, local, state, and federal government sectors that result in energy efficiency measure installations in low income households”. Progress will be measured by tracking the following criteria:

- **Dollars saved:** Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU (shared/contributed/donated resources, elimination of redundant processes, shared/contributed marketing materials, discounts, or reductions in the cost of installation, replacement, and repair of measures, are just some examples of cost savings to the IOU).
- **Energy savings/benefits:** Leveraging efforts are measurable and quantifiable in terms of home energy benefits/savings to eligible households.
- **Enrollment increases:** Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

1.5.1 Describe the efforts taken to reach out and coordinate the Energy Savings Assistance Program with other related low income programs offered outside the IOU that serve low income customers.

As previously mentioned, SDG&E works closely with a network of approximately 200 CBOs to connect customers with programs and solutions related to Customer Assistance, bill payment resources, energy conservation, Public Safety Power Shutoffs, resiliency, and wildfire preparedness. Some of these partners include Women, Infant and Children (WIC) agencies,

Catholic Charities, 211 San Diego, and similar agencies. As part of the intake process, 211 San Diego enrolls eligible customers in CARE or FERA and offers leads to the ESA Program. Approximately 2,000 leads and 75 customer enrollments were generated through SDG&E's ESA Program partnership efforts in 2022.

SDG&E also coordinated leveraging efforts between the Solar on Multifamily Affordable Housing (SOMAH) Program and the ESA Program. SDG&E's MF Single Point of Contact (SPOC) attended SOMAH and IOU Working Group meetings in 2022 and assisted in referring 120 ESA CAM leads to SOMAH, as well as distributing SOMAH collateral during its customer touchpoints. SDG&E received one ESA lead from the SOMAH Program Administrator in 2022.

SDG&E also partners with the Disadvantaged Communities Single-family Affordable Solar Homes (DAC-SASH) Program Administrator, currently GRID Alternatives, to initiate leveraging efforts with the DAC-SASH program. This effort includes annual data sharing effort of ESA single-family enrollments for households that exceed 400% of baseline as part of the CARE Program high usage process. See below for detailed information on coordination efforts with other external low income programs.

1.5.2 In addition to tracking and reporting whether each leveraging effort meets the above criteria in order to measure the level of success, please describe the Other Benefits resulting from this particular partnership not captured under the 3 criteria described above.

SDG&E's robust network of local agency partnerships helped the utility promote programs and services offered quickly and efficiently to customers in need. Partnerships with organizations such as 211 San Diego also helped streamline the enrollment processes for the programs and increased the ability of customers to receive comprehensive services, from payment assistance to ESA Program measure installation, providing for a simplified customer experience.

In support of the California Emerging Technology Fund (CETF), SDG&E added the broadband offer to the SDG&E assistance webpage and included CETF messaging on the October bill. SDG&E provided CETF the opportunity to provide contractors with information regarding the fund and its mission to provide affordable internet services to low income customers. CETF presented on the services available, how to help customers find program services, and the enrollment process. Additionally, on June 1, SDG&E held a virtual webinar with more than 50 CBOs in attendance. The webinar focused on Customer Assistance Programs income guideline changes and provided an additional opportunity for CETF to present information regarding the broadband program and the affordable services available.

1.5.3 Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented for this program year? What was the result in terms of new enrollments?

SDG&E partners closely with the State's Department of Community Services and Development (CSD) local Low Income Home Energy Assistance Program (LIHEAP) agencies to improve leveraging opportunities between LIHEAP and ESA Program. SDG&E contracts with the two LIHEAP agencies in San Diego County to provide outreach and assessment services for the ESA Program. As part of their outreach and enrollment efforts, these agencies leverage LIHEAP payment assistance customers as leads for ESA Program treatment efforts. In 2022, LIHEAP contractors enrolled more than 750 customers in the ESA Program (See ESA Table 14 included in Appendix H of this report). This continued effort reduced costs associated with outreach and verification by leveraging the LIHEAP income verification process.

As part of the long-standing partnerships with local LIHEAP payment assistance agencies, SDG&E continued leveraging efforts with LIHEAP organizations to support non-IOU fuel customers by offering various payment assistance programs available and maximizing

measures offered through the ESA Program and LIHEAP. This partnership also allows for the installation of measures to renters that may not be available through the ESA Program.

1.5.4 Describe the coordination efforts with water agencies or companies (wholesalers or retailers).

As part of SDG&E's leveraging agreement with San Diego County Water Authority (SDCWA), SDCWA reimburses SDG&E for water measures installed as part of the ESA Program in homes where customers have an active SDCWA account. In total, SDG&E received \$85,714 in reimbursements from SDCWA in 2022.

1.6 Integration Success

Per D.08-11-031:

“Integration constitutes an organization's internal efforts among its various departments and programs to identify, develop, and enact cooperative relationships that increase the effectiveness of customer demand side management programs and resources. Integration should result in more economic efficiency and energy savings than would have occurred in the absence of integration efforts.”

1.6.1 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the California Alternate Rates for Energy (CARE) Program.

In 2022, the FPG income requirements increased from 200% to 250%, thereby increasing the number of potential eligible customers for the ESA Program and providing the opportunity to align with FERA Program eligibility for households of three or more. SDG&E's online joint CARE/FERA Application is a leveraging tool for the ESA Program, creating ESA Program leads when a customer applies for CARE/FERA. Contractors are assigned program leads for customer follow-up. In 2022, over 29,000 leads were created through the joint online internet application leveraging efforts, and approximately 3,200 customers were enrolled. Customers enrolling in ESA, but not previously on CARE or FERA, can sign up for the CARE Program through the ESA Program agreement forms.

1.6.2 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Residential Program.

Within the residential energy efficiency portfolio, SDG&E attempts to minimize confusion that property owners/managers may have regarding various program participation and eligibility requirements through the MF Single Point of Contact (SPOC). The MF SPOC approach was authorized in D.16-11-022 to provide a one-stop shop for MF property owners and managers²⁴ and was subsequently updated in D.21-06-015²⁵ to additionally offer benchmarking and financial services. The MF SPOC continued to leverage leads to SOMAH, ESA and ESA CAM, in addition to evaluating multifamily properties. Internal analytics were used to determine the likelihood of ESA Program eligibility for tenants while also supporting enrollment efforts in SDG&E's bill assistance programs, such as CARE, FERA, and the Medical Baseline Programs. The MF SPOC also offered On-Bill Financing (OBF) and Benchmarking services during customer touchpoints, as well as SDG&E's Residential Zero Net Energy Transformation (RZNET) Program.

The MF SPOC coordinates all common area and in-unit enrollments across low income and energy efficiency programs, thus creating a seamless and comprehensive whole building approach for the participant. The MF SPOC approach also allows for better visibility and identification of areas for refinements in the programs to improve property owner/manager satisfaction.

1.6.3 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Government Partnerships Program.

See Section 1.5.4 describing the current partnership with the SDCWA.

²⁴ D.16-11-022 at 202.

²⁵ D.21-06-015 at OPs 130 and 131.

1.6.4 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with any additional Energy Efficiency Programs.

As described above, SDG&E's MF SPOC coordinates efforts targeted toward multifamily properties for energy efficiency programs. In cases where a multifamily property's common area meter is on a non-residential (commercial) rate, the MF SPOC can leverage non-residential energy efficiency programs to provide additional energy efficiency options, including the Residential Zero Net Energy Transformation (RZNET) Program. The intake and qualification process for the non-residential energy efficiency offerings and residential programs is the same allowing for a seamless and simplified customer experience.

1.6.5 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Demand Response programs, including successes in Air Conditioning Cycling or other Demand Response programs, including the new Summer Reliability programs from D.21-12-015.

To ensure that ESA program contractors are knowledgeable in both energy efficiency and Demand Response (DR) offerings, ESA Program management communicated the latest DR program eligibility guidelines, enrollment details, and benefits of participating. At the time of installation of a smart thermostat, contractors provided customers with information on the current AC Saver Thermostat Program cash back offerings. Additionally, SDG&E coordinated with the Power Saver program, providing contractor training on communications to customers regarding the initiative. As a result, in 2022, SDG&E installed 143 smart thermostats, totaling \$33,008 in program cost.

1.6.6 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the California Solar Initiative Programs.

All California Solar Initiative (CSI) Programs are closed. This includes CSI General Market, CSI Thermal, MASH and SASH. Decision D.06-01-024²⁶ established the CSI General Market program with funding to be made available through 2016. Assembly Bill (AB) 797 (Irwin) authorized the CSI Thermal program to continue operation until July 31, 2020. OPs 11 and 12 of D.15-01-027 provided funding for the MASH and SASH programs until December 31, 2021. Although these programs have closed, newer non-CSI solar programs have been developed. This includes the DAC-SASH program, and the Solar on Multifamily Affordable Housing (SOMAH) program.²⁷ These new programs offer new opportunities to integrate and coordinate with the Energy Saving Assistance Program.

Pursuant to OP 2 of D.20-12-003, SDG&E entered into a non-disclosure agreement (NDA) with GRID Alternatives, the implementer of DAC-SASH, to share customer data. D.20-12-003 required the electric utilities to provide GRID Alternatives with an annual data set of customers profiles to support marketing and outreach efforts for the DAC-SASH program. The customer profiles are specific to ESA program participants identified as residing in single-family, owner-occupied homes within a disadvantaged community. In May 2022, SDG&E provided 2,160 leads to GRID Alternatives in compliance with D.20-12-003 in accordance with the NDA and sent out several thousand postcards in July 2022.²⁸

²⁶ D.06-01-024 at 2.

²⁷ D.18-06-027 adopted the DAC-SASH program and D.17-12-022 established the SOMAH program.

²⁸ As reported in the GRID Alternatives Semi-Annual Programs Report filed January of 2023. *See* Disadvantaged Communities – Single-Family Solar Homes (DAC-SASH) Program, Semi-Annual Progress Report (Jan 2023) at 22, available at <https://gridalternatives.org/dac-sash-progress-reports>.

SDG&E continued regular meetings with GRID Alternatives to identify opportunities for additional leveraging activities with its low income programs. In 2022, SDG&E began also exploring new efforts to leverage FERA Program enrollments.

SDG&E also collaborated with GRID Alternatives to enroll customers in the ESA Program based on DAC-SASH program participation. In 2022, GRID Alternatives requested to transition to a semi-annual process for providing leads to SDG&E. SDG&E received a total of 47 leads and two ESA enrollments from this effort.

Pursuant to OP 43 of D.21-06-015, SDG&E participated in the Income-Qualified and Clean Energy Program Workshop. The purpose of the workshop was to provide stakeholders with an opportunity to connect, inform and share learnings to better coordinate cross program participation for income qualified households. Discussions included barriers for access to clean energy, program integration, short- and long-term goals, and data sharing. SDG&E established recurring monthly meetings with GRID Alternatives to identify opportunities for improving program efforts. SDG&E continues to seek additional opportunities for cross-program alignment and to address challenges and opportunities presented at the workshop.

1.6.7 Provide the number of referrals to the Single Family and Multi-Family Affordable Solar Homes Program Administrator.

As described above, pursuant to OP 12 of D.15-01-027, the Single Family and Multi-Family Affordable Solar Homes Programs closed on December 31, 2021. However, newer solar programs such as DAC-SASH and SOMAH allow new opportunities to provide data and referrals.

Pursuant to D.20-12-003, SDG&E established the DAC-SASH program and new leveraging efforts with GRID Alternatives (GRID), including annual ESA and CARE customer and program information data sharing.²⁹

As a result of discussions at September 30, 2021, Clean Energy Workshop, SDG&E and GRID Alternatives established reoccurring monthly meetings to discuss process improvements and ways to increase leveraging opportunities. In May 2022, SDG&E provided GRID with the required data.³⁰

Additionally, GRID provided SDG&E with ESA leads received from the DAC-SASH program. Through December 2022, SDG&E received 47 ESA Program leads and two enrollments resulting from this activity.

Regarding the SOMAH program, Resolution (Res.) E-4987³¹ required SDG&E to respond to recurring data requests from the Center for Sustainable Energy (CSE). This includes an annual data request to provide CSE with a renewed list of potentially eligible electric customers. This is meant to streamline the program's marketing efforts. Additionally, this allows CSE to verify that the PV systems are being sized correctly, and the Virtual Net Energy Metering (VNEM) bill credits are being allocated appropriately to property tenants and common area meters. CSE also submits data requests for all addresses and meters associated with a SOMAH application.

Additionally, SOMAH also provides SDG&E with ESA leads. Through December 2022, SDG&E received 1 ESA Program lead and 0 enrollments resulting from this activity.

²⁹ D.20-12-003 at 7.

³⁰ Appendix A of D.20-12-003 outlines the requirements for utility data sharing efforts for the DAC-SASH Program.

³¹ Res. E-4987 (March 28, 2019) at OP 3 and Appendix B.

1.6.8 Report annually the number of referrals provided to other PAs for participation and the number of leads they successfully acted on by program type.

For annual report results, see ESA Table 14A (Clean Energy Referral, Leveraging, and Coordination) in the Appendix.

1.7 Workforce Education & Training

1.7.1 Please summarize efforts to improve and expand Energy Savings Assistance Program workforce education and training. Describe steps taken to hire and train low income workers and how such efforts differ from prior program years.

In 2022, SDG&E's workforce, education, and training (WE&T) continued to offer classes online due to lingering impacts of COVID 19 as well as the closure and transition of SDG&E's Energy Information Center, and contractor demand for online training. SDG&E sent email notifications to ESA Program contractors to provide their staff and installation crews with learning opportunities relevant to the ESA Program such as HVAC replacement, home energy usage, hot water heater, insulation and home envelope topics. In 2022, SDG&E utilized the RISE platform to communicate program changes to contractors, including modifications to the Statewide Policies and Procedures and Installation Standards Manuals. The platform also allows SDG&E to verify the notification was received. In 2023, SDG&E will be transitioning the implementation to RHA, who has a robust training platform used for hiring. SDG&E will continue to leverage the RISE platform of training HVAC and Water Heater Repair and Replacement contractors, and to track the completion of training for RHA employees.

In 2022, RHA, SDG&E's primary Outreach and Assessment contractor, conducted outreach to hire from the local community they serve. RHA provided customers with a leave-behind that outlined the benefits of working for the company and provided a QR code with a

direct connection to an online application. RHA cannot track the specific number of employees hired through this outreach effort.

1.7.2 Please list the different types of training conducted and the various recruitment efforts employed to train and hire from the low income energy efficiency workforce.

Please see above for a description of the training conducted. Additionally, SDG&E contractors utilize various business development organizations as part of recruitment and hiring efforts. San Diego Workforce Partnership, San Diego Health and Human Services, and San Diego Community College are some of the organizations utilized to find workforce resources for the ESA Program. Additionally, as mentioned above, RHA included employment information with low income customers as a recruiting tactic.

1.7.3 For the ESA Program - Provide the following metrics related to WE&T in support of Commission's effort to increase workforce opportunities for workers in disadvantaged areas.

- **Percent of incentive dollars spent on contracts with a demonstrated commitment to provide career pathways to disadvantaged workers.**

For the 2022 program year, SDG&E was not able to track incentive dollars spent on contract(s) providing career pathways to disadvantaged workers, as contracts were already in place and SDG&E anticipated including this requirement in scope for its 2023 ESA Program solicitations. To track this data in the future program, SDG&E's solicitations required that bidders include information regarding hiring practices from local and disadvantaged workers, worker training and career-ladder job development, with associated metrics. SDG&E anticipates collecting and reporting this information as it becomes available.

- **Number of Community Workforce Resources (CWR) participants who have been employed for 12 months after receiving the training. (provide contractors early warning of need for this information)**

This metric was not required for the ESA Program data for CWR participants in 2022. For the EE Program, SDG&E provides funding to the Lead Program Administrators as shown in Tables 3 and 4 of D.18-05-041.³² SDG&E receives proportional benefits from the Statewide Program through the CPUC's CEDARs reporting system. Please refer to the Lead Program Administrators' 2022 Annual Report for the performance of the respective Statewide Program.

- **Percent of total WE&T training program participants that meet the definition of disadvantaged worker.**

This metric has not been a requirement for SDG&E's ESA Program contractors; therefore, data is not available for 2022. For the EE Program metrics, the percent of the total WE&T training program participants that met the definition of disadvantaged worker in 2022, as tracked in SDG&E's WE&T program customer registration system, is 38%.

1.8 Studies

- 1.8.1 For each Study, provide 1) a summary describing the activities undertaken in the study since its inception; 2) the study progress, problems encountered, ideas on solutions; and 3) the activities anticipated in the next quarter and the next year.**

2022 Low Income Needs Assessment (LINA) Study

SCE managed the contract for the statewide LINA study. The selected consultant for the 2022 LINA was Evergreen Economics. The project commenced in January 2021 with a focus on the energy needs of low income renters. A public workshop was held in March 2021 to solicit feedback on the research plan.

A second public workshop was held in October 2022 to present the study results. Following this, the study report was finalized in December 2022 and can be accessed on

³² D.18-05-041 at 90 – 92.

Calmac.org as Study Id SCE0469.01. The following recommendations were presented in the final report.

- Prioritize single-family renters over multi-family renters for the ESA Program.
- Develop outreach strategy that engages renters and property owners simultaneously and communicates to renters that the program will work with the landlord on their behalf.
- Modify program outreach messaging to leverage specific sub-population findings – to emphasize ventilation and pollution protection benefits and potential bill reduction benefits resulting from HVAC-related measures.
- Increase program outreach to renter households with seniors, disabled residents, or a larger number of residents. Update program marketing materials to emphasize health benefits of HVAC-related measures, particularly for homes with seniors and/or members with health issues.

Lessons learned in terms of outreach strategies to this subset of customers were realized through the large-scale phone survey. When the survey first launched in November 2021 across the IOU territories, participation rates were lower than expected, and it was unclear whether the survey quota would be fulfilled. To mitigate this issue, the study consultant sent out an advanced letter (on CPUC letterhead with contact name and phone number provided) to pre-selected survey participants and provided customers with a \$25 gift card after survey completion. The incentive, along with the revised outreach strategy, proved to be effective and resulted in a steady uptake in survey completions.

Categorical Eligibility Study

SDG&E, on behalf of the IOUs, contracted with Evergreen Economics in June 2022 to review and assess means-tested public assistance programs that could serve as a way to qualify households categorically for three utility programs for low income households. The objectives of this study included:

1. Determine the degree of alignment of eligibility requirements of existing categorical eligibility programs with those of the low income energy assistance programs (CARE, ESA, and FERA);

2. Identify other means-tested programs that could serve to ensure categorical eligibility;

3. Recommend practical criteria for selection of programs to be used to provide categorical eligibility and recommend which programs should provide categorical eligibility going forward; and

4. Inform potential future auto-enrollment of participants from recommended categorical eligibility programs directly in CARE and FERA by assessing the suitability of auto-enrollment for recommended categorical programs and the steps required to establish auto-enrollment.

A project initiation meeting with members of the ESA CARE Study Working Group resulted in a draft research plan presented during a public webinar August 31, 2022. During the subsequent months, Evergreen Economics began researching 17 public assistance programs and conducted telephone interviews with representatives of the assistance programs to collect information on their eligibility requirements and application processes. Responses from these interviews were entered into an informational database which were used during the analysis phase of the study. An interim results memorandum describing the analysis process and results

was provided at the end of October and shared with the ESA CARE Study Working Group for discussion and feedback.

An additional task in the study to be completed in 2023 involves assessing the feasibility of automatic enrollment for CARE and FERA with categorical programs. Following the completion of that task, a draft report will be presented during a public workshop and then finalized. The study is expected to be completed prior to June 2023.

ESA CAM Process Evaluation

PG&E led a statewide process evaluation of the ESA CAM initiative with Resource Innovations Inc. (formerly Nexant) as the evaluator. The project commenced on July 29, 2021. The study has the following objectives: 1) Assess the relative effectiveness of the IOUs' MF-CAM outreach, delivery, and implementation strategies; 2) Identify what data currently exist and may be needed to facilitate more reliable evaluations of program impacts; and 3) Inform future program designs targeting the income-qualified multi-family sector. A draft research plan was presented in a public workshop in September 2021. Two additional public workshops took place during the course of the study: a midpoint workshop to present interim results in January 2022 and a workshop to present study results in September 2022.

Evaluation activities included a program materials review and in-depth interviews with the IOUs, program implementers, single point of contacts (SPOCs), and Energy Division staff. In addition, online surveys and phone interviews were conducted with participant property owners and managers along with online surveys of tenants in selected treated properties. Study deliverables include a program logic model, process flow diagrams and program participant journey maps. The project report included recommendations for improving the customer

experience and for collecting data for future evaluations. A summary of high-level findings is included below.

- **Delivery and Implementation Strategies:** The IOUs employed different program designs and approaches to implement the MF-CAM Initiative. The substantial differences in implementation approaches stem from the allocation of roles and responsibilities, and each presents unique challenges and benefits.

- **Participant (Property Representative) Experience:** Some potential participants were reluctant to participate due to unclear program eligibility rules, the unknown length of time required for the project, and upfront cost of participation. The opportunity to receive no-cost energy-efficient upgrades and the potential energy and bill savings ultimately persuaded these participants.

- **Tenant Awareness and Benefits:** Nearly 50% of the tenants reported they were aware of the MF-CAM Initiative and subsequent upgrades. In general, tenants reported limited benefits from the program upgrades to common areas.

The study was finalized in October 2022.³³

1.8.2 If applicable, submit Final Study Report describing: (1) overview of study; (2) budget spent vs. authorized budget; (3) final results of study; and (4) recommendations.

See Section 1.8.1 for study overview, results and recommendations. See ESA Table 15 for budget summary.

³³ The final report can be accessed on the California Energy Efficiency Energy Contracts website. See California Energy Efficiency Energy Contracts, Evaluation Studies Public Document Search, *available at* <https://pda.energydataweb.com/#/>.

1.9 Pilots

1.9.1 For each Pilot, provide 1) a summary describing the activities undertaken in the study since its inception; 2) the study progress, problems encountered, ideas on solutions; 3) the activities anticipated in the next quarter and the next year; and 4) Status of Pilot Evaluation Plan (PEP).

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

In compliance with D.21-06-015, SDG&E filed Advice Letter 3897-E/3037-G, which provided details regarding the Pilot workshop and SDG&E's Pilot implementation plan. SDG&E's Advice Letter was approved on January 12, 2022, and effective December 19, 2021. SDG&E released a one-stage, two-step solicitation with expected program launch in the third quarter of 2022, however SDG&E did not receive a sufficient number of responsive proposals based on the qualifications, requirements, and scoring criteria. In accordance with OP 42 of D.21-06-015, an extension was requested, which was subsequently granted with a new Pilot launch date of the third quarter of 2023. As such, SDG&E moved forward with a new solicitation. The new solicitation, Pilot Plus Pilot Deep 2.0, more closely aligns with SCE and SoCalGas's (SCE/SCG) program implementation plan as approved in their respective advice

letters.³⁴ SDG&E selected this option because it provides the bidders with a definitive implementation plan, already approved by the Energy Division, thus effectively facilitating the proposal development process. Additionally, SDG&E believed, based on its experience, that re-issuing the RFP for a bidder-proposed program design, as was the case in SDG&E's original RFP, would result in the same market-driven outcome.

On September 27, 2022, SDG&E hosted a public workshop to introduce the preliminary implementation plans for its Pilot Plus and Pilot Deep 2.0 program and sought stakeholder feedback. Subsequently SDG&E served the Pilot 2.0 Advice Letter on October 26, 2022, which became effective on November 25, 2022.³⁵ On November 29, 2022, the RFP Package was released to Bidders along with the Notice of Bidders Conference scheduled for December 6, 2022. There were 17 attendees and 16 companies represented. Throughout the third quarter of 2022, SDG&E conducted extensive outreach to encourage participation in the RFP Process. This included outreach to over 160 CBO, communications to multiple service lists, and months long LinkedIn advertisements announcing the Pilot 2.0 solicitation and encouraging participation and registration. The RFP LinkedIn advertisement continued to run during December and the number of registered Bidders on Power Advocate stood at 81. The second solicitation process began in the fourth quarter of 2022 with completion expected in the second quarter of 2023.

1.9.2 If applicable, submit Final Pilot Report describing: 1) Overview of pilot; 2) Description of Pilot Evaluation Plan (PEP); 3) Budget spent vs. authorized budget; 4) Final results of pilot (including effectiveness of the program, increased customer enrollments or enhanced program energy savings); and 5) Recommendations.

SDG&E did not have any active Pilots for the ESA Program in 2022.

³⁴ See SoCalGas Advice Letter 5902, approved January 12, 2022, and effective December 24, 2021. See also SCE Advice Letter 4650-E, approved January 12, 2022, and effective December 22, 2021.

³⁵ See SDG&E Advice Letter 4099-E/3134-G.

1.10 ESA Working Groups (WG) and Sub-Working Groups (SWG)

1.10.1 Please provide a brief background on each WG and SWG.

D.21-06-015³⁶ established the mandate for implementing the ESA Working Group (ESA WG) with a list of required tasks and actions.

In 2022, the IOUs complied with D.21-06-015 by organizing the ESA WG functions into three Sub-Working Groups (SWGs) and ESA WG Council. In December 2022, per D.22-12-029, the ESA WG added the CARE/FERA PEV SWG to expand the three SWGs from three to four:

- ESA Program Cost-Effectiveness SWG (CE SWG),
- ESA Program Policy and Procedures (PP) and Installation Standards (IS) Manual SWG (PP&IS SWG),
- Universal Application System SWG (UAS SWG), and
- CARE/FERA Post Enrollment Verification SWG (CARE/FERA PEV SWG).

Overall, the ESA WG Council performs the following functions:

- Oversees ESA WG and SWGs,
- Address cross-cutting program concerns beyond the ESA program,
- Coordinates activity with ESA/CARE Study Group, and
- Manages the Response-to-Recommendation (RTR) process, and
- Manages the Facilitation Team.

While ESA WG strives to encourage consensus on all topics, when consensus is not possible, the ESA WG will move forward with the majority while documenting the disagreements. These disagreements and open items are tracked into a Parking Lot document maintained by the facilitators. In addition, all ESA WG meeting material, notes, and actions are posted to the CPUC public site for public access (<https://pda.energydataweb.com>).

To improve communication within the ESA WG and SWG, a Basecamp system is implemented for all members to post discussions and coordinate interim work products. In addition, all non-public working session meeting notes, actions, and interim deliverables are

³⁶ D.21-06-015 at 413.

posted to the members-only Basecamp. All ESA WG and SWG's draft deliverables are posted to the CPUC public site to collect public feedback. The final deliverables are posted to the CPUC public site to support transparency.

1.10.2 What were the accomplishments of each WG and SWG in the 2022 PY?

2022 Energy Savings Assistance (ESA) Working Group

In 2022, ESA WG and ESA WG Council established the process and procedures necessary to administer the ESA WG infrastructure, including developing charter statements, governances, and Conflict of Interest disclosure statements. The non-IOU ESA WG members are encouraged to support a minimum of two SWGs to ensure continuity and consistency within ESA WG and SWGs. In addition, the five-member ESA WG Council met monthly to plan and address open issues.

By the end of 2022, ESA WG retained eight non-IOU members. In addition, with the support of the ESA WG co-chairs, the ESA WG completed eight statewide public meetings to engage ESA WG IOUs, non-IOUs member organizations, and the public.

While the SWGs support ESA WG, there are additional tasks within the ESA WG charters to support ESA program operations and improvements. These activities are incorporated into the ESA WG agenda to encourage public discussions for summer Demand Response (DR) responses, program implementation progress, unspent program budgets, Low Income Oversight Board (LIOB) liaison activities, and other ongoing program improvement concerns.

2023 Cost Effectiveness Sub-Working Group

Per D.21-06-015,³⁷ the Cost Effectiveness (CE) SWG scope is to provide

³⁷ D.21-06-015 at OPs 85 and 86.

recommendations on cost-effectiveness test considerations via a progress report no later than the end of Q1 2023, and also provide recommendations on the Non Energy Benefits (NEBs) study and stakeholder process via a progress report no later than December 31, 2022. Selected ESA WG Members and non-members supported the CE SWG to ensure project consistency and continuity.

In 2022, the CE SWG initiated two tasks - Task 1: Cost-Effectiveness Test Considerations and Task 2: Non-Energy Benefits Study and Stakeholder Process. Task 2 was completed, and a progress report submitted to the low income service list on December 28, 2022. Task 1 is expected to be completed in March 2023.

Policies and Procedures & Installation Standards (PP&IS) SWG

The scope of the PP&IS SWG is to incorporate timely updates to the PP&IS manuals to support program implementation.

In 2022, the PP&IS SWG requested that the ESA WG delegate the technical tasks to this SWG for resolution. Selected ESA WG Members support the PP&IS SWG to ensure ongoing project consistency and continuity. In addition, PG&E engaged RHA as the consultant to update the documentation of the PP&IS manuals and assess the Healthy Building Materials (HBM) requirements. These PP&IS updates are an iterative process based on program implementation needs over regular intervals.

In 2022, this working group completed the following tasks:

- The Statewide ESA Program 2021-2026 Cycle PP Manual update and the Summary of Statewide ESA Program Policy & Procedures Change documentation.
- The final version of the ESAP IS Manual (Version 1.1), including HBM requirements and the Summary of Statewide ESA Program Installation Standards Change documentation.
- The Final ESA Main Program Measure Offering Modification Protocol.

Universal Application System (UAS) SWG

D.21-06-015³⁸ ordered the IOUs to set up a Universal Application System WG, as part of the overall ESA WG, to complete the assigned tasks that include the UAS' purpose, goals, requirements, and intra- and interagency solutions and alternatives.

The UAS SWG successfully filed the *Universal Application System Sub-Working Group Recommendation Report* on July 1, 2022. By year-end, the UAS SWG delegated its charter back to the ESA WG Council to terminate its charter.

- **CARE/FERA Post-Enrollment Verification (PEV) SWG**

D.22-12-029³⁹ ordered the IOUs to form a SWG under the ESA WG within 60 days of the issuance of the decision, to focus on improving the income verification procedures and policies, with the ED having the ability to periodically update the scope of the WG's role and resolve potential disagreements among stakeholders. The scope of the CARE/FERA PEV SWG includes developing recommendations that could be implemented in the current program and proposed in the next program application cycle to create more efficient, transparent, or less burdensome recertification and income verification processes while balancing the need to verify eligibility and protect the integrity of the program; developing recommendations for additional reporting requirements in either IOU monthly or annual CARE/FERA reports to include data on arrearage and disconnection rates for customers removed from CARE/FERA due to non-response during recertification or PEV compared to other classes of customers; and exploring the CalFresh Confirm Hub tool and other data-sharing partnerships to verify customer income eligibility before requesting recertifications and PEV.

³⁸ D.21-06-015 at OP 45.

³⁹ D.22-12-029 at OPs 2 and 3.

1.10.3 What are some of the goals for each WG and SWG in PY 2023?

2023 Energy Savings Assistance (ESA) Working Group

For 2023, ESA WG will update its membership roster to include 11 non-IOU members, update co-chairs, and update ESA WG Council members. In addition, an update to the Conflict-of-Interest statements is currently pending. A few non-IOU members are dedicated to the CARE/FERA PEV SWG only, but most non-IOU members will continue to support a minimum of two SWGs to ensure consistency and continuity with ESA WG actions.

In 2023, ESA WG is scheduled to host eight public meetings, one dedicated to discussing CARE/FERA PEV SWG's recommendations. In addition, the ESA WG public meetings are expected to expand to cover Response-to-Recommendations (RTR) from the published low income studies to pursue ongoing program operation and improvement efforts.

2023 Cost-Effectiveness Sub-Working Group

In 2023, the IOUs are required to complete Task 1 by March 31, 2023. In addition, they will submit a joint Tier 1 AL informing the Commission of the next steps to begin the NEBs study and how the recommendations from Task 2 of the CE SWG will be incorporated. Afterward, the CE SWG may delegate its scope and charter back to the ESA WG to wind down the CE SWG in 2023. Later, the ESA WG Council will have the option to reconstitute another CE SWG as needed.

2023 Policies and Procedures P&P and Installation Standards (IS) SWG

Starting in 2023, the PP&IS SWG is working on the following tasks:

- Develop Multifamily Whole Building PP documentation,
- Develop standards for new ESA-Main Program measures modifications,
- Continue to update a series of ESA Program P&P Attachments to maintain consistency between PP and IS manuals,
- Address miscellaneous ESA-Main and ESA-MFWB technical, measure, and installation issues,

- Participate in the IOUs Mid-Cycle Reporting development and filing.

2023 Universal Application System (UAS) SWG

On January 26, 2023, the CPUC issued a ruling requesting additional UAS information and actions. As a result, the UAS project scope is amended to address the implementation of SB 1208 and the potential funding needs relating to the implementation of the concurrent application process system (CAS).

2023 CARE/FERA Post-Enrollment Verification (PEV) SWG

In 2023, the IOUs are ordered to form a CARE/FERA PEV SWG and meet specified milestones and deadlines in D.12-22-029, consistent with the ESA WG structure and governance; hold a public meeting in August 2023 to discuss its recommendations and to seek public input, and incorporate its recommendations into the IOUs Mid-Cycle Report.

1.11 Annual Public Meeting of ESA and CARE Program Prior Year Results

On July 28, 2022, the IOUs held the annual public meeting, presenting the 2021 results. The meeting was held in collaboration with the ESA Working Groups quarterly meeting; 44 participants were in attendance.

1.12 Multifamily Properties

1.12.1 The IOUs shall conduct and report an annual analysis of the square footage, energy consumption, ESA Program participation. Please include the breakdown of market rate and deed restricted properties treated.

SDG&E used the results of a multifamily market study completed in 2020⁴⁰ to identify the multifamily buildings used in this analysis. Properties characterized as “market rate” (with no rent restrictions) were chosen for the analysis. Properties with a high proportion of low

⁴⁰ Residential Energy and Water Intelligence (Res-Intel), SDG&E Multifamily Market Characterization, December 2020.

income tenants were then identified using a proxy code from SDG&E’s customer data matched to each premise. A total of 8,907 properties were identified using these criteria. As shown in the table below, annual consumption for these properties in 2022 was 284,934 MWh and 20,421,236 therms. Furthermore, 395 of these properties received treatment through the ESA Program in 2022.

SDG&E Multi-Family Non-Deed Restricted Property Characteristics

Estimated Number of Properties	Average Conditioned Area Square Footage	Total Annual MWh for 2022	Total Annual Therms for 2022	Number of Properties Treated by ESA in 2022
8,907	7,484	284,934	20,421,236	395

For 2022, deed restricted properties were treated either through ESA CAM for common area treatments or through the ESA main program for in-unit treatments. Section 1.12.2 below provides information on the common area treatments provided to deed restricted properties in 2022 through ESA CAM. Section 1.12.3 provides information on the common area treatments provided to deed restricted properties in 2021 through ESA CAM.

1.12.2 The IOUs shall describe the activities conducted in multifamily properties for multifamily common area measures under the ESA Program.

In 2022, SDG&E continued its outreach efforts by utilizing its MF SPOC and third-party implementer to further promote the programs within the multifamily space. Per Advice Letter 3820-E/3004-G, approved and effective August 2, 2021, SDG&E’s ESA CAM initiative 2022 goal was treatment of 40 properties. In program year 2022, the ESA CAM initiative continued to offer ESA CAM to Deed Restricted properties, treating a total of 29 properties for the year, achieving 73% of its treatment target.

Below is a summary of the ESA CAM Initiative accomplishments for 2022.

Description	Target	Actual	% Of Target
# of MF CAM properties treated	40	29	73%
Total Budget	\$4,261,527	\$1,453,499	34%
kWh Savings	N/A	358,265	N/A
kW Savings	N/A	54	N/A
Therm Savings	N/A	1,488	N/A

The implementer for ESA CAM reported that they continued to experienced delays gathering necessary forms and signatures from the property owners, as well as supply chain issues that delayed the receipt of some measures and materials, especially high efficiency boilers and HVAC systems, which hindered the implementer’s ability to close out projects and complete property treatments.

To address the above-mentioned challenges, SDG&E is now collecting all eligibility documentation and signatures up front, while also advising property owners during the audit review of all necessary signatures and forms that will be needed further along in the process. In addition, to streamline processes and further minimize customer touchpoints, SDG&E plans to continue collaboration with the SOMAH Program to leverage leads across ESA programs.

Finally, SDG&E’s MF SPOC continued to leverage the Res-Intel Study findings that provided the following three services to improve data for comprehensive MF targeting efforts: 1) linked service accounts to a specific multifamily property by creating a Multifamily Property ID as a unique identifier; 2) added valuable real estate data taken from San Diego County Assessor Records and CoStar such as square footage, number of units, and amenities; and 3) developed Energy Use Intensity and Energy Benchmark scores for each property. SDG&E documents several key statistics from the original multifamily property dataset:

- There are an estimated 33,199 multifamily sites in San Diego and SDGE's service territory of Orange County. Of these, 31,985 match with at least one SDG&E gas or electricity meter, and 27,654 have sufficient data to construct an energy consumption profile.
- 67% of multifamily properties have fewer than five units. The other 33% are composed of larger than 5+ unit properties.

Through these combined efforts and with the use of the MF Market Characterization data set, SDG&E hopes to strengthen its targeted multifamily marketing strategy and establish more leads.

1.12.3 Normalized Metered Energy Consumption Analysis of Multi-family Properties

This section provides a Normalized Metered Energy Consumption (NMEC) analysis on multi-family properties treated through the ESA CAM initiative. The analysis requires twelve months of consumption data metered prior to measure installation date and twelve months of consumption data metered after the installation date. The analysis provided below is for properties treated in 2021.

Twenty multi-family properties were treated with common area measures during the period of January 2021 through December 2021. Installed measures include interior and exterior lighting, central boilers, furnaces, heat pumps, faucet aerators and programmable thermostats. Deemed savings reported for these installations were 369,123 kWh and 20,549 therms. More than 99 percent of the electric savings resulted from the lighting upgrades, and more than 99 percent of the gas savings resulted from the replaced boilers.

Evergreen Economics was hired to perform a site level NMEC analysis on each of the 20 properties. In addition to normalizing for weather differences across years, the analysis also controlled for changes in energy usage outside of the installation period. Multiple sites exhibited unexplained usage patterns during the baseline period. These are called non-routine events

(NREs). If not adjusted, these consumption anomalies would impact the savings estimates resulting from the program interventions. Evergreen identified 16 sites with NREs, eleven sites with electric usage anomalies and 5 sites with gas usage anomalies. A regression model was used to estimate the impact of each NRE on the energy usage of the site. Adjustments were then made to the modeled predicted usage in the post installation period to account for the unexpected observed change in energy usage (the NRE). This adjusted predicted usage minus the actual usage results in the estimated energy savings.

The table below presents the results of the analysis. Avoided energy use refers to the estimated post treatment savings using actual weather conditions during that period. Normalized energy savings are adjusted for “typical” weather conditions.⁴¹ As shown, both first year avoided energy use and normalized energy savings are significantly lower than the reported ex ante savings. Percentages in the tables are percentages of adjusted predicted usage. Site level results are presented in Appendix G.

Annual Energy Savings from NMEC Analysis⁴²

Energy	Ex-Ante Annual Savings	%	First Year Avoided Energy Use	%	Normalized Energy Savings	%
kWh	369,123	9%	319,077	8%	311,574	8%
Therms	20,871	27%	4,230	5%	4,144	5%

⁴¹ “Typical” weather conditions are based on historical weather patterns. This analysis used the CZ2018 reference weather files based on weather patterns from 1998 to 2017.

⁴² Ex ante therms savings (20,871 therms) for the six sites receiving gas measures are shown in the table. Total reported ex ante therm savings for the program year (20,549 therms) include interactive effects at other sites.

The tables below group the results by reliability, NREs, and positive or negative savings.

Annual Electric Savings from NMEC Analysis by Group

Group	Site Count	Ex Ante kWh Savings	%	Normalized kWh Savings	%	Realization Rate
Total	20	369,123	9%	311,574	8%	84%
Most Reliable Sites	14	300,455	10%	240,924	8%	80%
No NREs	9	138,800	14%	127,686	13%	92%
Has NREs	11	230,323	8%	183,888	6%	80%
Significant Savings	16	335,535	9%	311,880	9%	93%
Insignificant Savings	4	33,588	10%	-305	0%	-1%
Positive Savings	17	330,634	9%	318,588	9%	96%
Negative Savings	3	34,488	17%	-7,014	-3%	-18%

Annual Gas Savings from NMEC Analysis by Group⁴³

Group	Site Count	Ex Ante therm Savings	%	Normalized therm Savings	%	Realization Rate
Total	6	20,871	27%	4,144	5%	20%
Most Reliable Sites	2	14,253	60%	-696	-3%	-5%
No NRE	1	9,320	99%	544	6%	6%
Has NREs	5	11,551	17%	3,601	5%	31%
Positive Savings	4	13,462	24%	5,772	10%	43%
Negative Savings	2	7,409	35%	-1,628	-8%	-22%

⁴³ All six sites receiving gas measures showed statistically significant results.

CALIFORNIA ALTERNATE RATES FOR ENERGY ANNUAL REPORT

2. CARE EXECUTIVE SUMMARY

Summary of 2022 Results

The CARE Program offers a discount on the monthly energy bill to low income households with income at or below 200 percent of the FPG. Today, the program provides a 20 percent discount on natural gas charges and a 30 to 35 percent discount on electric rates. Despite a few challenges experienced during the year, CARE enrollments had an upward trend and concluded the 2022 program year with 355,600 customers participating in the CARE Program, resulting in an overall enrollment rate of 123% and exceeding the year's enrollment rate target of 90%. Contributors to the growth of the CARE Program in 2022 included print, streaming TV, digital media, bill inserts, ethnic marketing, email, and direct mail campaigns. Outreach through SDG&E's Energy Solutions Partner Network and CARE Capitation Agencies were also a large factor in 2022's success. The most successful and effective outreach partnership was the "Live CARE Call Campaign" administered by The Harris Group (THG). This campaign resulted in 26,335 submitted CARE applications, more than 20,000 new CARE customer enrollments and 4,267 CARE recertifications.

SDG&E's successful enrollment initiatives included initiating the implementation of automated CARE and FERA recertification paper form processing, which is an effort to reduce the amount of time spent manually processing these forms and to reduce administrative costs.

In 2022, SDG&E experienced a processing backlog and system issue that impacted CARE, FERA, and Medical Baseline (MBL) customers. On March 17, 2022, SDG&E served a Rule 16.6 Extension of Time to Comply Letter to Executive Director Rachel Peterson (March 17 Letter) for purposes of notifying the Commission that SDG&E took action to reinstate certain

CARE, FERA, and MBL customers onto their respective programs and to request an extension for recertification for certain CARE, FERA, and MBL customers from 90 days to up to 2 years. The letter, which was served on the service list for A.19-11-003, described SDG&E's backlog (Backlog) in application and recertification processing due to issues with SDG&E's recent conversion to a new Customer Information System (CIS). As a result of the Backlog and other related CIS issues, approximately 20,000 CARE and FERA customers fell off their respective low income program.

SDG&E reinstated all customers who had fallen off CARE or FERA since April 5, 2021, and adjusted all customer bills to account for any eligible discounts back to the date the customer was dropped from their respective program. Pursuant to the additional requirements ordered by the Executive Director in granting SDG&E's request for an extension of time to comply, SDG&E submitted bi-weekly reports to the Energy Division with updates.

In October 2022, SDG&E identified 1,701 CARE, FERA, and MBL customers who were removed from the programs due to their failure to recertify. These customers were provided notice prior to SDG&E pausing the recertification process in February but then had their enrollment dates extended as part of the backlog remediation. Because the customer had received prior notice to recertify, the system was not triggered to send an additional notice regarding their new enrollment end dates, in accordance with SDG&E's revised notification procedures, and the customers did not act. Subsequently, they were removed from their respective programs. Out of an abundance of caution, and to ensure a fair approach to all customers given the system logic issue, SDG&E reinstated the impacted customers. SDG&E reissued recertification notices to allow the customers another opportunity to renew. There were 561 impacted MBL customers that required no bill correction as SDG&E had identified the issue

before the next billing cycle. SDG&E identified the same issue for 1,140 CARE/FERA customers and followed the same reinstatement and recertification process. A total of 122 CARE/FERA accounts required a rebill. This item was promptly reported in SDG&E's bi-weekly report to the Energy Division on October 26, 2022, and November 9, 2022.

On January 12, 2023, the Utilities Enforcement Branch (UEB) issued a data request regarding SDG&E's processing backlog and system issue with the CARE, FERA, and MBL bill discount programs. SDG&E gathered and delivered all data requested by UEB for their review. The UEB confirmed receipt of SDG&E's response and has not issued any follow up questions at this time.

Procedural Background

In June of 2021, the Commission issued D.21-06-015, which approved SDG&E's CARE Program plans and budget for program years 2021 through 2026. D.21-06-015 approved key directives which included:

(1) the extension of the CARE Expansion program recertification period from two years to four years; (2) establishment of an exemption for fixed income households from recertification and verification requests until their account is closed, customer of record is altered, or a minimum of six years has transpired since the customer's income was verified using program approved documentation; (3) establishment of a four-year recertification cycle for CARE customers with a high probability score (at least 80 percent); (4) modification of the post-enrollment verification requirements for customers that exceed 400 percent of baseline from one time in 12 months to three times in a 12-month period; (5) approval of an outbound call pilot for "attempted but failed" post-enrollment verified households; (6) approval for an increase in capitation fees from \$20 to up to \$30 per enrollment; (7) approval of the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program statewide budget at a total of \$10,515,012 for program years 2021 – 2026; and (8) approval of a program evaluation for CHANGES by an independent third party to detail the benefits and cost-effectiveness of services delivered to low income customers. Lastly, the Decision retained the 90 percent CARE enrollment rate.⁴⁴

⁴⁴ D.21-06-015 at OPs 4, 6, 7, 9, 10, 13, 14, 20, and 21.

2.1 Participant Information

2.1.1 Provide the total number of residential CARE customers, including submetered tenants, by month, by energy source, for the reporting period and explain any variances of 5% or more in the number of participants.

Residential CARE Program ⁴⁵						
Electric Customers by Month				Gas Customers by Month ⁴⁶		
PY 2022	CARE Customers	Percentage Change ⁴⁷		PY 2022	CARE Customers	Percentage Change ⁶⁴
Jan	324,010	2.0%		Jan	189,625	2.3%
Feb	325,013	0.3%		Feb	190,369	0.4%
Mar	324,983	0.0%		Mar	190,717	0.2%
Apr	342,438	5.4%		Apr	201,823	5.8%
May	344,091	0.5%		May	202,881	0.5%
Jun	346,624	0.7%		Jun	204,456	0.8%
Jul	348,091	0.4%		Jul	205,537	0.5%
Aug	351,099	0.9%		Aug	207,356	0.9%
Sep	348,916	(0.6%)		Sep	206,326	(0.5%)
Oct	353,416	1.3%		Oct	208,193	0.9%
Nov	355,007	0.5%		Nov	208,997	0.4%
Dec	355,600	0.2%		Dec	209,403	0.2%

2.1.2 Describe the methodology, sources of data, and key computations used to estimate the utility's CARE enrollment rates by energy source.

SDG&E used the joint utility methodology adopted by the CPUC in D.01-03-028 for developing monthly and annual enrollment estimates in 2022.⁴⁸ This methodology entails annual estimation of eligibility for CARE, ESA, FERA, and other income-by-household size parameters

⁴⁵ Due to the timing of collection of CARE enrollment data, numbers throughout this report may vary slightly based on reporting timeframe from each monthly report throughout the year.

⁴⁶ Gas Customers by Month is a subset of the Electric Customers by Month.

⁴⁷ April's increased variance is due to the completion of the reinstatement effort for the Backlog as described under Section 2 – CARE Executive Summary.

⁴⁸ D.01-03-028 at 49-50. A.19-11-003, Compliance Filing of Pacific Gas & Electric on Behalf of Itself, Southern California Gas Company, San Diego Gas & Electric Company, and Southern California Edison Company Regarding Annual Estimates of CARE Eligible Customers and Related Information (February 14, 2022). Athens Research produces the report that is included as part of this compliance filing. The analysis and subsequent report for this compliance filing is produced by Athens Research.

at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state.⁴⁹

Sources for the 2022 eligibility estimates include the Health and Human Services (HHS) Poverty Guidelines⁵⁰ (“bundling” one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327), current year small-area vendor marginal distributions on household characteristics, Census 2010 Summary File 3 (SF3) data, Census American Community Survey 2015-2021 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources.

The method takes into consideration American Community Survey microdata relationships between guideline status (above/below 200% FPG), tenure, and fuel payment relationships. These cross classifications are fitted to small area (block group) marginals to produce payer type specific distributions, which can be aggregated to various other geographical levels.

The method also incorporates the impact of labor force changes (unemployment and other forms of job separation, as well as positive changes), and adjusts block-group marginal distributions on household income based on sub-state modeling that incorporates Current Population Survey, Integrated Public Use Microdata Survey Data, American Community Survey Data, and California Employment Development Department (EDD) county and Metropolitan Statistical Area level labor force series. This adjustment to block-group income marginal is then

⁴⁹ Athens Research performs the analysis using the joint utility methodology to provide the estimates for the California IOUs. The methodology described below is detailed within the Athens Research report.

⁵⁰ See, Federal Register / Vol. 87, No. 14 / January 21, 2022 / Notices, pps. 3315-3316.

incorporated into the otherwise “standard” estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

Method adjustments include block group marginal distributions on household income based on sub-state modeling that incorporates the Current Population Survey, Integrated Public Use Microdata Survey data, American Community Survey data, and the California EDD county and metropolitan statistical area level labor force series. The adjustment to block group income marginal is then incorporated into the otherwise “standard” estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

Estimates from the block-group level are aggregated to county/utility and whole utility level, among other aggregations. Annually, SDG&E applies county/utility level eligibility fractions to a new set of “technical eligibility counts” (for CARE these are metered and sub-metered occupied housing units) obtaining an estimate of income/demographic eligibility in household count form.

SDG&E counts the number of households (by small area, by county, and overall) that are enrolled in CARE. The CARE household total, including individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility.

2.1.2.1 Describe how the estimates of current demographic CARE-eligibility rates, by energy source for the pre-June 1st periods, were derived.

The joint utility methodology, as described above in Section 2.1.2, was used throughout 2022.

2.1.2.2 Describe how the estimates of current CARE-eligible meters were derived. Explain how total residential meters were adjusted to reflect CARE-eligible meters (i.e., master meters that are not sub-metered or other residential meter configurations that do not provide residential service.)

CARE eligibility rates by small and large areas are developed so they only apply to individual residential meters and sub-metered dwelling units. Non-sub-metered master meters and other meters that do not provide residential service are not included in the “technical eligibility” meter counts.

2.1.2.3 Discuss how the estimates of current CARE-eligible households were developed.

See SDG&E’s response above for Section 2.1.2. Note that the methodology is based on estimating small area (block group) level household size by income and household-age tabulations for the current year and connecting these estimates with small area counts of households that are individually metered or sub-metered. Block-group/utility-specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area: zip+2, zip, tract, county, territory, etc. Statewide estimates, regardless of utility boundaries, are also provided at small and large area levels.

2.1.2.4 Describe how current CARE customers were counted.

SDG&E runs a report of active CARE participant statuses for each month in Systems Applications and Products in Data Processing (SAP), which is the system of record for CARE applications, and includes both individually metered and sub-metered CARE participants.

2.1.2.5 Discuss how the elements above were used to derive the utility’s CARE participation rates by energy source.

The participation rate by energy source is the total number of participating CARE customers by energy source divided by the estimated eligible CARE population by energy source. Since SDG&E provides electricity to all customers, the number of participation rates,

referred to as penetration rates in the annual and monthly report tables, are derived from electric service only.

2.1.3 Provide the estimates of current demographic CARE-eligibility rates by energy source at year-end.

Electric	22.7%
Gas	22.1%

2.1.4 Provide the estimates of current CARE-eligible sub-metered tenants of master-meter customers by energy source at year-end.

Electric	14,762
Gas	11,137

As of year-end 2022, there were 34,104 residential electric sub-metered accounts and 26,429 residential gas sub-metered accounts in SDG&E’s service territory. Utilizing the methodology described in Section 2.1.2.3 – 2.1.2.5 above, it is estimated that 43% (or 14,762) of the electric residential sub-metered tenants and 42% (or 11,137) of the residential gas sub-metered tenants are eligible for the CARE Program.

2.1.5 Provide the current CARE sub-metered tenant counts by energy source at year-end.

Electric	10,512
Gas	9,652

2.1.6 Provide the current CARE sub-metered enrollment rates by energy source at year-end.

Electric	71%
Gas	87%

2.1.7 Discuss any problems encountered during the reporting period administering the CARE Program for sub-metered tenants and/or master-meter customers.

In 2022, as described above, SDG&E experienced a processing backlog and system issue that impacted certain CARE customers.

2.1.8 Discuss the steps taken towards Marketing CARE to Mobile Home customers and converting Mobile Home Sub-metering to direct utility served customers.

In January 2022, SDG&E sent 329 direct mail pieces to mobile home park owners or managers promoting the CARE discount. The letter encouraged owners or managers to pass the information to their tenants and included an informational poster to hang in common areas. Mobile home residents may also be exposed to SDG&E's CARE general awareness campaign, including TV, print, social media, and digital advertising.

2.2 CARE Program Summary

2.2.1 Please provide CARE Program summary costs.

CARE Budget Categories	2022 Authorized Budget⁵¹	2022 Actual Expenses	% of Budget Spent
Outreach	\$2,492,218	\$2,492,218	100%
Processing, Certification and Recertification	\$1,470,139	\$1,470,139	100%
Post Enrollment Verification	\$456,452	\$76,786	17%
Information Tech./Programming	\$933,662	\$591,569	63%
Pilots	\$0	\$0	0%
CHANGES Program	\$273,967	\$273,967	100%
Measurement and Evaluation	\$107,719	\$82,798	77%
Regulatory Compliance	\$309,000	\$173,441	56%
General Administration	\$630,000	\$443,631	70%
CPUC Energy Division Staff	\$67,888	\$40,478	60%
Total Expenses	\$6,741,045	\$5,645,026	84%
Subsidies and Benefits ⁵²	\$165,211,754	\$228,617,353	138%
Total Program Costs and Discounts	\$171,952,799	\$234,262,379	136%

⁵¹ Reflects total authorized funding approved in the D.21-06-015, Attachment 1, Table 2 as adjusted for program year 2022 fund shifts in accordance with the fund shift rules set forth in D.08-11-031 as modified by D.10-10-008, D.16-11-022, D 17-12-009, and D.21-06-015.

⁵² CARE Rate Discount budget amount reflected in Advice Letters 3928-E & 3849-E and 3027-G-A, effective January 1, 2022.

2.2.2 Please provide the CARE Program enrollment rate to date.

CARE Enrollment			
Participants Enrolled	Eligible Participants	Enrollment Rate	Goal Met?
355,600	289,319	123%	Yes

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

In 2022, SDG&E received two customer complaints regarding the CARE recertification process. The customers were removed from CARE due to delays in processing. The customers' recertifications were completed at the time of the calls, with both customers being reinstated onto the CARE Program with corrective billing adjustments.

2.3 CARE Program Costs

2.3.1 Discount Cost

2.3.1.1 State the average monthly CARE discount received, in dollars, per CARE customer by energy source.

Average Monthly Electric Discount	\$49.76
Average Monthly Gas Discount	\$9.26

2.3.1.2 State the annual subsidy (discount) for all CARE customers by energy source.

Electric Subsidy	\$205,993,118
Gas Subsidy	\$22,624,235

2.3.1.3 Provide the Number and Percent of Green Tariff Shared Renewables (GTSR) and Enhanced Community Renewables customer base. Also provide the average total bill discount.

GTSR is the name used as an umbrella name for both SDG&E's Green Tariff (Schedule GT) and its Enhanced Community Renewables (Schedule ECR) rate.

In May 2022, pursuant to D.18-06-027 and D.21-12-036, SDG&E filed Application (A.) 22-05-023. Specifically, D.18-06-027 required that each of the major investor-owned energy utilities file an application for review of two rates; the Disadvantage Communities Green Tariff (DAC-GT) rate and the Community Solar Green Tariff (CSGT) rate. Subsequently, the Commission directed each of the major investor-owned energy utilities to include its Green Tariff Shared Renewables (GTSR) Program in its applications discussed above. SDG&E did so and requested immediate suspension of its GTSR program to protect program participants from impacts of optional Green Tariff rates that are on a trajectory to be more than 20 times higher than the rates were two years ago, which cannot be overcome through program design changes. The Ruling approved the limited relief request by granting SDG&E the ability to suspend GT, while the suspension of ECR is still pending in the proceeding. Advice Letter 4074-E was filed and effective on September 9, 2022, to suspend Schedule GT and its customers were subsequently unenrolled. To date, SDG&E has not had any customer enrollments in ECR as it has had no solar developers bring new projects online to serve ECR customers under the specific constraints of the rate.

2.3.2 Administrative Cost

2.3.2.1 Show the CARE Residential Program’s administrative cost by category.

Category	Total
Outreach	\$2,492,218
Processing, Certification, Recertification	\$1,470,139
Post Enrollment Verification	\$76,786
IT Programming	\$591,569
Pilots	\$0
CHANGES Program	\$273,967
Measurement & Evaluation	\$82,798
Regulatory Compliance	\$173,441
General Administration	\$443,631

CPUC Energy Division	\$40,478
Total Program Costs	\$5,645,026

2.3.2.2 Explain what is included in each administrative cost category.

Outreach

Costs include those related to printing and mailing CARE applications and correspondence, postage, bill inserts, brochures and flyers, advertising, email notifications, targeted direct mail, telephone campaigns, outreach staff labor, CBO partnership fees, and capitation fees.

Processing, Certification and Recertification

Costs in this category include staff labor related to processing applications and customer contact center activities, including, but not limited to, the following:

- Scanning and indexing applications;
- Processing CARE applications;
- Initiating and responding to customer inquiries regarding CARE applications/program;
- Fielding telephone calls related to CARE Program participation; and
- Resolving disputes related to CARE Program enrollment.

Post Enrollment Verification (PEV)

Costs in this category include staff labor related to CARE PEV processing and other costs including, but not limited to, the following:

- Processing CARE income verification and CARE High Usage Verification;
- Responding to customer inquiries regarding CARE income verification documents; and
- Resolving customer issues related to income verification

Information Technology (IT) /Programming

Costs include IT system support related to maintenance of program systems such as: staff and contractor labor, CARE documents, Interactive Voice Recognition (IVR) system, system reports, data exchanges, and costs associated with system enhancements to comply with Commission mandates and improving operational efficiencies.

Pilots

In 2022, SDG&E did not have any costs to report under the CARE Pilot category.

Measurement and Evaluation

Costs include studies and customer satisfaction surveys associated with the CARE Program.

Regulatory Compliance

Costs include staff labor and non-labor costs related to the preparation of various regulatory filings, including program applications, advice letter filings, audits, regulatory reports, comments, tariff revisions, attendance at working groups and joint utility meetings, public input meetings, and other Commission hearings or meetings. In addition, costs include program funding directed by the Commission to be included in this category.

General Administration

Costs include, but are not limited to, the following: office supplies, facilities, training and development, and staff labor associated with program management and day-to-day operations.

Commission Energy Division Staff Funding

Costs incurred by the Commission’s Energy Division staff in support of the Commission’s authorized low income program.⁵³

2.3.3 Provide the year-end December 31, 2022 balance for the CARE balancing account.

Electric CARE – Under-Collection	\$78,674,437
Gas CARE – Over-Collection	\$(2,938,517)

2.3.4 Describe which cost categories are recorded to the CARE balancing account and which are included in base rates.

The general cost categories recorded to the CARE gas and electric balancing accounts include the CARE discount and the program specific administrative expenses as described above in Section 2.3.2.2. There are no costs related to the discount charged in base rates.

2.3.5 Provide a table showing, by customer class, the CARE surcharge paid, the average bill paid, the percentage of CARE surcharge paid relative to the average bill, the total CARE surcharge collected, and the percentage of total CARE revenues paid.

Please see CARE Table 10 in Appendix H of this report.

2.4 Outreach

2.4.1 Discuss utility outreach activities and those undertaken by third parties on the utility’s behalf including Lifeline coordination.

In 2022, the CARE Program continued to be the leading offering of SDG&E’s Customer Assistance Programs marketing campaign, which seeks to connect with low income customers across a diverse population including hard-to-reach customers, seniors, customers with access and functional needs, and multilingual/multicultural customers. The campaign drove eligible

⁵³ D.00-02-045 directs the utilities to fund up to 10 civil service positions for the EE and low income programs. OP 9 allocates these costs 15% to SDG&E, 25% to SoCalGas, 30% to SCE, and 30% to PG&E. OP 10 further directs that each IOU allocate respective low income costs 70% to CARE and 30% to LIEE (now known as ESA).

customers to apply for CARE, and through SDG&E's coordinated efforts, CARE enrollments were converted into ESA Program leads. The Customer Assistance Programs tactics supported CARE, FERA and ESA Programs, while other tactics were program specific. The campaigns included print, streaming TV, digital media, bill inserts, ethnic marketing, email, and direct mail with examples provided in Appendix B - F of this report. This was in addition to live calls, and outreach through SDG&E's Energy Solutions Partner Network, and CARE Capitation Agencies that help enroll customers in the CARE Program. More information on each tactic employed in 2022 is included below including third party activities and Lifeline collaboration.

Mass Media

Mass media allowed SDG&E to educate and connect with its customers through diversified communication mediums designed to reach a mass audience and hard-to-reach populations including customers in rural areas, seniors, customers with access and functional needs and multilingual/multicultural customers. It served to drive overall awareness and complement other outreach tactics. In 2022, mass media components included print, streaming TV, general market TV, PSA-style TV interviews, digital media, and bill inserts.

Print Campaigns

SDG&E continued to run print advertising in ethnic (African American, Asian, Hispanic) and rural (backcountry) publications garnering 3,595,166 impressions. New in 2022, SDG&E added an Eldercare Directory, family magazines and expanded its East County representation to reach a wider print audience. Samples of print campaign materials are included in Appendix D of this report.

General Market & Streaming TV

In 2022, SDG&E ran a TV commercial campaign utilizing both Linear and Streaming TV media. The 30-second spots ran on general market stations including: ABC, CBS, NBC, FOX, CW, and KUSI. SDG&E also ran on Spanish-language stations, including Univision, Telemundo and Televisa. Streaming TV ran across multiple platforms and apps for both the general market and Spanish-language markets. Streaming TV is very flexible and allows SDG&E to target customer segments more deeply and optimize performance throughout the campaign. Through streaming TV, viewers cannot fast forward through the commercials. SDG&E ran one English and one Spanish version of its TV commercial from August to September. Additionally, SDG&E ran PSA-style TV interviews in English, Spanish, and Vietnamese of available programs, including the CARE program. Examples of the TV spots are included in Appendix B of this report.

Digital

SDG&E used an integrated online strategy to increase awareness and drive online submissions by using paid search, display ads, and pre-roll video ads. SDG&E digital ads were seen over 13 million times (impressions) throughout the year with over 345,900 customers clicking through to the CARE/FERA/ESA Program online application.

Bill Inserts

The annual CARE bilingual notification took place in July 2022. All customers who indicated a preference for paper bills received the bilingual application in their SDG&E bill, while paperless bill customers were provided a link to view their monthly bill inserts. SDG&E also did a double-sided, bilingual bill insert promoting the CARE and ESA Programs in 2022.

Ethnic Marketing

SDG&E reached numerous ethnic segments throughout the year with a variety of mass media tactics. Hispanic, African American, Chinese, Vietnamese, and Filipino audiences were targeted by print. SDG&E continued to target Hispanic audiences via Spanish television and digital campaigns. The total spend for these ethnic media campaigns was \$162,046, which is detailed in Appendix A.

Email Campaigns

In 2022, SDG&E continued the strategy of using the nurture campaign model. The campaign included a series of pre-written, automated emails to customers based on their reaction to an initial email. This allowed SDG&E to provide more customized messaging in automated follow-up emails. The actions that determine the messaging are:

- Opened an email;
- Did not open an email;
- Clicked on a link within an email;
- Visited a webpage; or
- Clicked on a link within a webpage.

Customers may receive up to five messages (including reminders) over a 30-day period, depending on engagement level. This type of campaign can eliminate redundant messages or over-marketing and increase customer engagement to help bring them closer to conversion.

In 2022, in accordance with the Community Choice Aggregation (CCA) Code of Conduct, SDG&E continued to use email creative that shows non-CARE/non-CCA customers potential bill savings if they applied for and qualified for CARE. SDG&E showed the customer amounts paid on their energy bill in comparison to what the customer would have paid on CARE and highlighted the savings.

The campaigns contained integrated messaging and directed customers to the online application. Throughout the campaign, subject lines and content were modified based on customer behavior. In 2022, SDG&E sent over 627,324 bill comparison emails. Unique open rates, defined as how many people opened the email, were as high as 53%, indicating the subject lines were compelling to customers. By comparison, the energy industry standard open rates are approximately 33%. Customer Assistance Programs emails garnered an average click-through rate of 4%, while SDG&E's average click-through rate was 2.4%.

Direct Mail

SDG&E conducted a CARE direct mail campaign in 2022. SDG&E sent a letter showing customers what they would have saved if they were on CARE as described above. The letter encouraged recipients to call SDG&E's toll-free enrollment number or to apply through SDG&E's online application. SDG&E's Direct Mail campaign was sent to 7,552 customers. A sample of the Direct Mail message from these campaigns can be found in Appendix E of this report.

Lifeline Collaboration

SDG&E continued to include information on Lifeline and provided the Lifeline toll-free phone number in the CARE acceptance letter and on SDGE.com within the Low Income Assistance section of the website. The enhancement to SDG&E's website provides a resource for customers seeking telephone bill assistance which can benefit customers.

CHANGES Program

The CHANGES program is a statewide program administered by a Commission selected third party lead contractor. The lead contractor selects and subcontracts with CBOs who act as utility liaisons for limited English proficient customers with utility inquiries and issues. In

SDG&E's service territory these CBOs are the Alliance for African Assistance, Deaf Community Services of San Diego, and Casa Familiar. The CBOs target specific communities and offer other programs that are meant to complement SDG&E's services. The lists of CBOs in SDG&E's service territory were shared with SDG&E's internal Call Center and outreach team. The IOUs and CHANGES teams met regularly in 2022 to discuss program effectiveness.

Live Call Campaign

The Harris Group (THG) utilized the data analysis from the CARE prospect list and continued an outbound call campaign to reach out to potentially eligible customers who live in SDG&E's service territory. THG's outbound call campaign (Live Call Campaign) also included a CARE Recertification Campaign.⁵⁴ For 2022, the THG Live Call Campaign and CARE Recertification Campaign efforts resulted in over 26,335 completed CARE applications, contributed to over 20,000 new CARE enrollments, and over 4,267 CARE recertifications.

Community Outreach & Engagement

Community outreach allows SDG&E to connect and directly engage customers with energy savings solutions and programs in the communities where they work and live. These outreach activities provide information about SDG&E's CARE Program to potentially eligible customers. SDG&E has established partnerships with social service entities, such as the County of San Diego Health and Human Services Agency (HHS), Access to Independence, and Ramona Senior Center, to connect with customers who are considered hard-to-reach or potentially have a language barrier. SDG&E also leveraged its established partnerships with non-profit organizations to deliver over 80 presentations, workshops and trainings, and participate in

⁵⁴ As detailed in Advice Letter 3729-E/2967-G, effective May 1, 2021, SDG&E relaunched the recertification process for CARE, FERA, and MBL customers on July 1, 2021.

over 340 community events to assist SDG&E in securing enrollments through an organization that customers trust. The partnership with HHSA resulted in approximately 690 CARE applications, 600 CARE enrollments, and 80 CARE recertifications.

CARE Capitation Agencies

SDG&E partners with 20 social service agencies such as the Women, Infants and Children (WIC) program, refugee assimilation organizations, 211 San Diego, and others to help enroll hard-to-reach customers. These organizations serve vulnerable, 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 provide multilingual staffing and are in diverse, low income communities serving multicultural/multilingual, seniors, veterans, individuals with access and functional needs, and limited English proficient (LEP) audiences. These partners contributed to over 3,000 CARE applications, over 1,550 CARE enrollments, and nearly 320 CARE recertifications.

Energy Solutions Partner Network

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

and Instagram, posting information on their websites, providing booth space at events, and hosting enrollment day fairs at their locations. In 2022, over 2,650 activities were coordinated through this partner network to promote SDG&E's Customer Assistance Programs, resulting in over 2,300 social media messages – Facebook, Twitter, and Instagram – by SDG&E's Energy Solutions Partner network, reaching over six million impressions. The Energy Solutions Partner Network's activities were able to generate approximately 100 completed CARE applications, over 90 CARE enrollments, and more than 30 CARE recertifications.⁵⁵

Community Events & Presentations

Every year, SDG&E participates in hundreds of community events and presentations throughout its service area. Many of SDG&E's Energy Solutions Partners host community events that offer social services and customer education opportunities such as: health and wellness fairs, community resource fairs, food banks, police and fire department open houses, and cultural fairs, as well as educational/STEM activities through schools and communities. SDG&E believes these are excellent opportunities to participate and further promote Customer Assistance Programs, since the events often attract low income and fixed-income audiences. These events typically attract a variety of customer demographics including youth, seniors, and individuals with access and functional needs. These community events also service SDG&E's rural, tribal, and harder to reach populations. In 2022, SDG&E promoted CARE and other Customer Assistance Programs in over 430 presentations and events, reaching over 21,000 people.

⁵⁵ As detailed in Advice Letter 3729-E/2967-G, effective May 1, 2021, SDG&E relaunched the recertification process for CARE, FERA, and MBL customers on July 1, 2021.

Branch Offices and Customer Care Center

SDG&E's outreach team collaborates with the branch offices and bill payment locations to aid in educating customers on programs and services during impacted times of the year, such as summer months where customers may experience higher bills. At the start of 2022, the branch offices remained closed as a result of the COVID-19 pandemic but were still accepting drop-off applications. In May of 2022, the offices reopened to in-person interactions. In total, the branch offices received over 375 CARE applications, resulting in over 330 CARE enrollments, and over 190 CARE recertifications.⁵⁶ In November of 2022, SDG&E incorporated Boost Lingo Video Remote Interpreting (VRI) station at each branch office. This technology allows for better communication with the deaf and hard of hearing customers that come into the offices in need of services.

SDG&E's Customer Care Center also assists roughly a million customers with a variety of energy inquiries each year. Customers are provided with information about the CARE Program in both English and Spanish while waiting to speak with an Energy Service Specialist (ESS) via the Interactive Voice Recognition System over the phone. An ESS offers the CARE Program and completes customer enrollments online for those customers who qualify. In 2022, the Customer Contact Center completed over 60 CARE applications, which contributed to over 45 CARE enrollments, and over 70 CARE recertifications.⁵⁷

⁵⁶ As detailed in Advice Letter 3729-E/2967-G, effective May 1, 2021, SDG&E relaunched the recertification process for CARE, FERA, and MBL customers on July 1, 2021.

⁵⁷ *Id.*

2.4.1.1 Discuss outreach to CARE customers for the Home Energy Report, including percentage participation.

In 2022, approximately 164,000 (46%) CARE customers received a Home Energy Report (HER) representing 23% of the 700,000 recipients in the HER Program. The reports include a comparable homes comparison module that allows recipients to see how their consumption compares to homes of the same general size within their area. Additionally, the reports educate customers on their energy consumption, provide energy saving tips and, when applicable, encourage enrollment in CARE for those not already participating. Moreover, 107,000 CARE customers signed up through the HER program to receive emailed energy efficiency alerts to help them proactively manage their usage.

2.4.2 Discuss the most effective outreach method, including a discussion of how success is measured.

SDG&E continues to look for the most effective ways to communicate with customers. As stated in Section 2.4.1, in 2022, SDG&E utilized several different outreach methods to enroll eligible CARE customers. The effectiveness of each outreach method is measured differently depending on the method. Some outreach methods may be measured on open rates, number of impressions, number of customers educated and informed of the program, and number of customers enrolled. Of the different outreach methods, it is hard to define which one was the most effective because it can take several marketing impressions before a customer acts. However, if outreach effectiveness is based on the number of CARE enrollments and the conversion rate, the most successful and effective method was the “Live CARE Call Campaign” administered by THG. This campaign resulted in 26,335 submitted CARE applications and enrolled over 20,000 new CARE customers and resulted in 4,267 CARE recertifications for 2022, resulting in a 93% conversion rate. To measure the success of some outreach methods, SDG&E provides each CARE partner, contractor, and activity with a unique source code number

that they submit with each CARE application. This allows SDG&E to track each CARE application, CARE recertification, and CARE enrollment by source.

2.4.3 Discuss barriers to participation encountered during the reporting period and steps taken to mitigate them.

Directives relating to income verification policies and practices in 2022 resulted in low attrition and a high penetration rate of 123%. This trend is expected to return to pre-2020 levels as income verification levels resume in the coming years. As the verification requirements ramp up, the CARE Program must constantly evaluate and sometimes shift its focus to determine ways to counteract these challenges, most notably in hard-to-reach areas. To that end, SDG&E introduced new print publications that targeted hard-to-reach rural customers, ethnic communities, families and seniors. Additional details on this effort can be found in section 2.4.9.

Additionally, to gain a better understanding of barriers from the customer perspective, the program surveyed a total of 400 program participants. The survey results revealed that most participants remain satisfied with the CARE Program (91%). The survey also provided the following insights:

- 100% of respondents have taken at least one step to saving money on their utility bill including: turning off lights, using appliances less, adjusting thermostat;
- Those stating that they have improved the energy efficiency of their home and/or purchased an energy-efficient appliance has increased significantly;
- Email remains the most-preferred method for receiving information about CARE;
- Larger discounts on the monthly energy bill continue to be the top suggestion by customers;
- Online CARE application submittals have increased using MyAccount, SDGE.com and emails from SDG&E.

2.4.4 Discuss how customer data CARE and other relevant program information is shared by the utility with other utilities sharing its service territory.

SDG&E and SoCalGas share data for customers in Orange County who are served by both SoCalGas and SDG&E. In 2022, SDG&E received 284 enrollments through this effort. In addition, SDG&E shares CARE customer data with California American Water (CalAm) to assist in identifying customers for their Customer Assistance Programs. In 2022, SDG&E provided over 350,000 leads to CalAm.

2.4.5 Discuss how CARE customer data and other relevant program information is shared within the utility, for example, between its Energy Savings Assistance Program and other appropriate low income programs.

When an eligible online enrollment or recertification for the CARE Program is received, an ESA lead is automatically sent to the Energy Efficiency Collaboration Platform (EECP) system if the customer is determined to be eligible based on the prior treated date. Upon an eligible income verification for the CARE Program, an ESA lead is automatically created stating “CARE Income Certified,” letting the outreach agency know they do not need to perform the income eligibility process for this customer. In turn, the EECP system sends the CARE Program system ESA eligibility information once an ESA enrollment is received. The CARE Program system determines if the customer will be auto-enrolled, income certified, or recertified based on their current CARE status. This automation has increased the number of qualified leads and CARE enrollments, as well as reduced the number of letters sent for CARE recertification and PEV.

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

SDG&E partners with CBOs and social service providers throughout San Diego, which continues to be an effective form of leveraging and enrolling customers into the CARE, FERA, and ESA Programs. These organizations are involved daily with customers that meet the Commission's income or categorical qualifications and provide a one stop source for resources. Some of these organizations are WIC, CalFresh, LIHEAP, Covered California, and California Lifeline. Other partners include the CARE Capitation agencies such as 211 San Diego, and LIHEAP contractors. The CARE, FERA, and ESA Programs were promoted through presentations, events, workshops, and customized partner network messaging. Additionally, as mentioned above in section 2.4.5, SDG&E CARE enrollment leads are shared with the ESA Program, increasing customer reach of other low income programs.

2.4.6.1 Track Costs of AB 793 related Energy Management Technologies programs (Identify all of the programs or initiatives that will be able to benefit from the availability of the end-use and electric usage profiles, and to coordinate with the relevant proceedings so that the relevant costs can be considered in those proceedings' cost-effectiveness decision-making).

See Section 1.2.5 above.

2.4.7 Describe the process for cross-referral of low income customers between the utility and CSD. Describe how the utility’s CARE customer discount information is provided to CSD for inclusion in its federal funds leveraging application. (Note: These agreements are limited to sharing 1-800 phone numbers with customers and providing CARE benefit information for the federal fiscal year, October 1 of the current year through September 30 of the subsequent year. There are no tracking mechanisms in place to determine how many customers contact the other programs or actually become enrolled in other program(s) as a result of these agreements.)

SDG&E continues to find value in leveraging partners such as CSD. This partnership demonstrates SDG&E’s commitment to utilize every feasible effort to reach out to customers in need. SDG&E promotes the CSD’s LIHEAP bill payment assistance and weatherization services programs and includes CSD LIHEAP’s phone number on SDG&E’s CARE applications and program materials so customers have direct contact information to access services. SDG&E’s Customer Assistance Programs staff also informs customers about services offered by CSD and refers customers to CSD for additional bill assistance through LIHEAP. Lastly, SDG&E’s agreement with 211 San Diego requires part of the customer screening to include referral to LIHEAP agencies such as CUI and MAAC, as appropriate. In 2022, 211 San Diego handled approximately 63,900 utility-related calls and referred 10,705 of those to LIHEAP agencies.

2.4.8 Discuss any recommendations to improve cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties under contract to the utility to improve outreach and enrollment services to non-participating households in the prior year. Provide cost-effectiveness assessments, if available.

In 2022, SDG&E implemented the new high usage requirement as ordered under D.21-06-015. The new high usage requirement allows CARE customers to trigger the high usage verification process on the third instance in a rolling 12-month period. The new requirement also

reduces the number of CARE customers that may be required to complete the high usage verification process.

SDG&E launched a special email campaign for customers required to recertify their eligibility in the CARE program. The email campaign aimed at encouraging customers to complete the recertification process through SDG&E's online portal. As of December 2022, approximately 60% of customers were completing the recertification process through SDG&E's online portal.

SDG&E began to implement the automation of processing CARE recertification paper forms. The automation will reduce the amount of time spent manually processing recertification forms received. The automation is expected to launch in 2023.

2.4.9 Low CARE Penetration Zip Codes. Discuss the strategies that were effective in targeting and enrolling these hard to reach households. Include the IOU's successes, short-comings, and corrective plans in ME&O strategies to enroll customers in zip codes that fall into these categories.

In 2022, SDG&E introduced new print publications that targeted hard-to-reach rural customers, ethnic communities, families and seniors.

Ads ran for CARE, FERA and ESA with over 2.4 million impressions. By utilizing community partners as influencers, SDG&E was able to connect with the below hard-to-reach audiences. These influencers used their own words to promote Customer Assistance Programs offerings to their respective audiences.

- Backcountry Communities Thriving – posted on social media and handed out flyers to residents of Julian and surrounding rural areas reaching approximately 2,200 customers.
- Viet TV News – produced news segment featuring SDG&E spokesperson, aired commercials and posted on social media. Viet TV has approximately 20,000 viewers.

- God Radio – ran 120 radio spots, one month banner ad and social media post on this station that reaches the Black community and churchgoers, gaining about 270,800 impressions.
- Jewish Family Services – handed out flyers and sent eblasts to low income users of their services. Impressions unknown.
- San Diego Farm Bureau- ran print ads in San Diego Grown and annual Source Book.

This effort reached approximately 1,600 members who reside in rural areas of the county. While leveraging these influencers' impact is an important part of an awareness campaign, it is hard to quantify their reach and success. SDG&E will continue to develop and hone influence marketing in 2023.

SDG&E Outreach strategically participated in various events based on the demographics reached and overall community-need, with an enhanced focus on reaching individuals with an access and functional need, to promote all Customer Assistance Programs. Events were not specifically targeted based on CARE zip codes because of the over saturation of the program.

2.5 Processing CARE Applications

2.5.1 Describe the utility's process for recertifying sub-metered tenants of master-meter customers.

In general, tenants of sub-metered facilities follow similar recertification guidelines as individually metered dwellings. Sub-metered tenants are provided with a two-year recertification period, except for fixed income tenants who are required to recertify every six years. Once sub-metered tenants are due to recertify, they are provided with a mailed renewal request. If no response is received within 30 days, SDG&E mails a second request to the tenants prior to removal.⁵⁸

⁵⁸ As detailed in Advice Letter 3729-E/2967-G, effective May 1, 2021, SDG&E relaunched the recertification process for CARE, FERA, and MBL customers on July 1, 2021.

2.5.2 Describe any contracts the utility has with third parties to conduct certification, re-certification and/or verification on the utility’s behalf. Describe how these third-party efforts compare to the utility’s efforts in comparable customer segments, such as hard-to-reach or under-served. Include comparisons of effectiveness and cost-effectiveness of comparable customer segments, if available.

Collaboration with third party contractors is a necessary component to successfully reach and enroll hard-to-reach and under-served customers. In 2022, SDG&E partnered with third parties to conduct certification and recertification of CARE customers on the utility's behalf. As previously discussed, SDG&E contracted with THG to conduct a Live Call Campaign and CARE Recertification Campaign, resulting in 20,155 CARE enrollments and 4,261 recertifications.⁵⁹ SDG&E also partnered with 211 San Diego, a 24-hour resource and information center connecting residents with community, health, and disaster services. Customers often contact 211 San Diego in an emergency to locate important resources including bill assistance programs, food, and shelter. The 211 San Diego partnership resulted in 1,401 CARE enrollments and 249 CARE recertifications.

SDG&E measures the effectiveness of the CARE outreach program in two ways. The first measure of success is generating overall program education and awareness through mass media and community outreach tactics. The second is customer engagement to generate and measure enrollments. For these harder-to-reach and underserved audiences, it is important to utilize multiple tactics as stated above. It is difficult to evaluate cost-effectiveness per tactic, given that some of these tactics cannot be directly sourced to the actual customer enrollment and/or that the customer may experience multiple tactics prior to completing recertification. This is especially true for mass media tactics like television, print, and online advertisements. In 2022,

⁵⁹ *Id.*

SDG&E's online advertising garnered over 20 million impressions (the number of times an on-line user saw an SDG&E ad), while ethnic print advertising had a readership of over 2.4 million and ethnic television garnered over 3.9 million impressions. All mass media channels encouraged customers to call SDG&E's toll-free number or visit SDG&E's website to complete an online application. It is challenging to determine how many impressions it took for customers who enrolled through the toll-free and online application process. However, as a general marketing principle, it may take 10 or more touches before a consumer acts and responds to a tactic. Additional SDG&E ME&O activities are detailed in Section 2.4.1. These activities include mass media, print campaigns, streaming TV, digital, bill inserts, ethnic marketing, email campaigns, direct mail campaigns, community outreach and engagement, CARE partners, Energy Solutions Partner Network, community events and presentations, customer contact centers, and branch offices.

2.6 Program Management

2.6.1 Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

In 2022, SDG&E experienced a processing backlog and system issue that impacted some CARE customers. Further details on this matter can be found under Section 2 - CARE Executive Summary.

2.7 Pilots

In June 2022, SDG&E launched the CARE post-enrollment verification (PEV) Outbound Call Pilot. The Pilot was designed to operate for ten months through March 2023. The outbound pilot consisted of contacting customers who incorrectly provided documentation for purposes of PEV. During 2022, SDG&E contacted 465 customers. SDG&E spoke to 192 customers and 51 customers successfully provided the documentation for post enrollment verification. More than

40 percent of phone calls resulted in voicemail and no returned phone calls. The reporting of phone calls through March of 2023 will be reported in the 2023 annual report.

2.8 Studies

2022 Low Income Needs Assessment (LINA) Study

See ESA Program Section 1.8.1, which is also applicable for the CARE Program.

Categorical Eligibility Study

See ESA Program Section 1.8.1, which is also applicable for the CARE Program.

CHANGES Evaluation

PG&E is managing a statewide evaluation of the CHANGES program. The evaluation began on February 25, 2022, with Opinion Dynamics as the consulting firm conducting the study. The study research areas and objectives include:

- Overall Performance: Assess the overall program performance associated with the anticipated needs of the target population.
- Data Collection: Identify the extent to which current program data collection supports an understanding of the program's effectiveness and ongoing reporting for success.
- Program Value: Identify duplicative services, if any.
- Program Costs & Funding: Document how the budget and program costs are allocated across services or functional areas, the extent to which the budget is appropriate, and the appropriateness of the funding source in relation to addressing the primary customer needs supported by CHANGES.
- Program Operations and Structure: Examine the operational effectiveness of the administration of the program.

The study includes interviews with participating CBOs and a mail survey of customers receiving services through the program. In addition, program documentation will be assessed. A written report documenting the findings and recommendations for the program is expected in Quarter 2 of 2023.

2.9 CARE Restructuring Working Group

In D.19-09-004, the Commission concluded that CARE would not be restructured at that time. In 2022, there were no activities related to the CARE Rate Restructuring effort.

2.10 Miscellaneous Describe outreach efforts contained in Attachment 6 of the Joint Stipulation adopted in D.21-06-015.

See ESA Program section 1.5.2 for additional details on Attachment 6.

3. CARE EXPANSION PROGRAM

3.1 Participant Information

3.1.1 Provide the total number of residential and/or commercial facilities by month, by energy source for the reporting period.

2022	Commercial		Residential	
Month	Electric	Gas	Electric	Gas
Jan	188	110	541	224
Feb	185	110	533	216
Mar	186	111	558	218
Apr	187	111	656	218
May	187	111	563	217
Jun	186	111	566	217
Jul	187	111	563	217
Aug	186	111	561	217
Sep	186	111	561	206
Oct	187	112	562	407
Nov	186	111	561	207
Dec	186	111	562	207

3.1.1.1 State the total number of residents (excluding caregivers) for residential facilities, and for commercial facilities, by energy source, at year-end.

Facility Type	Electric	Gas
Commercial	10,210	5,558
Residential	2,007	1,031

3.2 Usage Information

3.2.1 Provide the average monthly usage by energy source per residential facility and per commercial facility.

Commodity	Residential	Commercial
Gas	32	378
Electric	382	9727

3.3 Program Cost

3.3.1 Administrative Cost (Show the CARE Expansion Program’s administrative cost by category).

In 2022, SDG&E’s Expanded CARE Program costs were related to an email marketing campaign and did not exceed \$100.

3.3.1.1 Discount Information

3.3.1.2 State the average annual CARE discount received per residential facility by energy source.

Residential Facility Gas Discount	\$5,919.28
Residential Facility Electric Discount	\$20,809.87

3.3.1.3 State the average annual CARE discount received per commercial facility by energy source.

Commercial Facility Gas Discount	\$4,377.39
Commercial Facility Electric Discount	\$36,545.33

3.4 Outreach

3.4.1 Discuss utility outreach activities and those undertaken by third parties on the utility’s behalf.

SDG&E employs skilled and knowledgeable Energy Solutions Advisors that promote programs such as Expanded CARE with partners who manage multifamily low income housing. The SDG&E Advisor team also promotes Expanded CARE through general outreach activities. The Advisors work with SDG&E’s CBOs within the Energy Solutions Partner Network, Community Relations Advisors, and Account Executives to deliver presentations, host booths at

community events, and send e-updates including newsletters and social media posts when available.

In 2022, SDG&E sent a targeted email campaign to 3,000 non-profit organizations and agricultural facilities promoting Expanded CARE. The email lists the benefits of enrolling in Expanded CARE and encourages eligible customers to apply.

Discuss each of the following:

3.4.1.1 Discuss the most effective outreach method including a discussion of how success is measured.

Historically, the most effective outreach method to promote Expanded CARE is through SDG&E's skilled and knowledgeable customer facing team, consisting of assigned Account Executives and Customer Outreach Advisors. These groups work directly with customers who may be eligible for Expanded CARE and with CBO's who work directly with potentially eligible clients.

3.4.1.2 Discuss how the CARE facility data and relevant program information is shared by the utility with other utilities sharing service territory.

The shared territory between SDG&E and SoCalGas is in Southern Orange County. As described above, the two utilities share relevant program information on Expanded CARE facilities as needed.

3.4.1.3 Discuss barriers to participation encountered in the prior year and steps taken to mitigate these, if feasible, or not, if infeasible.

The barrier to participation for Expanded CARE tends to come from the ability for these facilities to meet the guidelines – specifically 100% resident eligibility and non-profit status of the organization. SDG&E's Marketing and Outreach and Account Executive team continues to

promote Expanded CARE to eligible customers through email campaigns, general outreach activities, and through the Energy Solutions Partner Network when applicable.

3.4.2 Discuss any recommendations to improve the cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties on the utility's behalf to improve outreach and enrollment services to non-participating facilities in the prior year. Provide cost-effectiveness assessments, if available.

In 2022, SDG&E launched a targeted marketing campaign to non-profit organizations and agricultural facilities encouraging eligible customers to apply for Expanded CARE.

Additional information on the marketing campaign can be found under Section 3.4.1.

Additionally, to address the barrier, and to improve the chances of non-participating facilities' participation in the program, SDG&E's Outreach and Account Executive teams continue to reinforce eligibility guidelines when applicable.

SDG&E will continue to explore ways to improve its operational cost-effectiveness, processing of applications, program delivery, and outreach and enrollment services to non-participating facilities in future program years.

3.5 Program Management

3.5.1 Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

In 2022, SDG&E experienced a processing backlog and system issue that impacted some CARE customers. Further details on this matter can be found under Section 2 - CARE Executive Summary.

FAMILY ELECTRIC RATE ASSISTANCE PROGRAM ANNUAL REPORT

4. FERA EXECUTIVE SUMMARY

Summary of 2022 Results

Pursuant to D.21-06-015, 2022 is the first year that the annual results for the FERA program are combined with the CARE and ESA annual report. Program year 2022 concluded with the FERA enrollment rate at 28% and a total of 12,248 participants. Like CARE, the FERA Program had a few challenges in 2022, including the processing backlog caused by a system issue that resulted in customers falling off their respective low income program, as described further in Section 2 CARE Executive Summary.

Procedural Background

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.⁶⁰ To qualify for the FERA Program, eligible customers must consist of households with three or more persons with total annual household gross income between 200% (plus \$1) and 250% of the FPG.

In 2021, the Commission issued D.21-06-015, which directed PG&E, SCE, and SDG&E (collectively, the Joint Utilities) to each achieve an enrollment goal of 50 percent by 2023 and a 70 percent goal by 2026, establish an auto-recertification process that mirrors the CARE Program auto-recertification process, implement a high usage post-enrollment verification process that aligns with CARE, and auto-enroll in FERA all customers who fail to meet the CARE income guidelines but meet the FERA Program qualifications.⁶¹ D.21-06-015 also approved a FERA administrative budget, which included costs for FERA specific marketing and

⁶⁰ The FERA Program was later implemented by the Commission in D.04-02-057.

⁶¹ *Id.* at OPs 24, 27, 28, and 30.

outreach strategies.⁶² With this approved marketing and outreach strategy came the establishment of a new capitation program for FERA and set the reimbursement rate for capitation contractors at up to \$30 per enrollment.⁶³ Lastly, D.21-06-015 directed the Joint Utilities to combine the FERA monthly and annual reporting with the CARE and ESA monthly and annual reporting beginning with the 2022 programmatic year.⁶⁴

Per Commission direction, SDG&E utilizes existing CARE Program procedures to administer the FERA Program. Such activities include, but are not limited to, outreach practices, enrollment, verification, and recertification activities.⁶⁵

4.1 Participant Information

4.1.1 Provide the total number of FERA customers By Month for the Reporting Period.

2022	FERA Enrolled
January	11,800
February	11,683
March	11,672
April	12,548
May	12,417
June	12,319
July	12,209
August	12,195
September	12,114
October	12,230
November	12,288
December	12,248

⁶² *Id.* at OP 1.

⁶³ *Id.* at OP 32.

⁶⁴ *Id.* at OP 185.

⁶⁵ P.U. Code Section 739.1(f)(2).

4.1.2 Provide the Total Number of FERA-Eligible Households, FERA-Participating Households, and FERA Household Enrollment Rates By Quarter.

TABLE 2			
FERA Enrollment Rate			
2022 Quarter Ending	(Estimated) FERA Eligible Households⁶⁶	FERA Participating Households	FERA Household Enrollment Rate⁶⁷
March 31	43,709	11,672	27%
June 30	43,709	12,319	28%
September 30	43,709	12,114	28%
December 31	43,709	12,248	28%

4.1.3 Discuss How the Estimates of Current FERA-Eligible Households Were Developed.

SDG&E used the joint utility methodology adopted by the Commission in D.01-03-028 for developing monthly and annual enrollment estimates in 2022.⁶⁸ This methodology entails annual estimation of eligibility for CARE, ESA, FERA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state.⁶⁹ Sources for the 2022 eligibility estimates include the Health and Human Services

⁶⁶ Compliance Filing of Pacific Gas & Electric (U 39-M) on Behalf of Itself, Southern California Gas Company (U 904-G), San Diego Gas & Electric Company (U 902-M) and Southern California Edison Company (U 338-E) Regarding Annual Estimates of CARE Eligible Customers and Related Information as reflected in A.19-11-003, et al. Originally filed on February 14, 2022. The analysis and subsequent report for this compliance filing is produced by Athens Research.

⁶⁷ The FERA household enrollment rate is calculated by dividing FERA Participating Households by FERA-Eligible Households.

⁶⁸ D.01-03-028 at 49-50. A.19-11-003, Compliance Filing of Pacific Gas & Electric on Behalf of Itself, Southern California Gas Company, San Diego Gas & Electric Company, and Southern California Edison Company Regarding Annual Estimates of CARE Eligible Customers and Related Information (February 14, 2022). Athens Research produces the report that is included as part of this compliance filing. The analysis and subsequent report for this compliance filing is produced by Athens Research.

⁶⁹ Athens Research performs the analysis using the joint utility methodology to provide the estimates for the California IOUs. The methodology described below is detailed within the Athens Research report.

(HHS) Poverty Guidelines⁷⁰ (“bundling” one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327), current year small-area vendor marginal distributions on household characteristics, Census 2010 Summary File 3 (SF3) data, Census American Community Survey 2015-2021 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources. The method considers American Community Survey microdata relationships between guideline status (above/below 200% FPG), tenure, and fuel payment relationships. These cross classifications are fitted to small area (block group) marginals to produce payer type specific distributions, which can be aggregated to various other geographical levels. The method also incorporates the impact of labor force changes (unemployment and other forms of job separation, as well as positive changes), and adjusts block-group marginal distributions on household income based on sub-state modeling that incorporates Current Population Survey, Integrated Public Use Microdata Survey Data, American Community Survey Data, and California Employment Development Department (EDD) county and Metropolitan Statistical Area level labor force series. This adjustment to block-group income marginal is then incorporated into the otherwise “standard” estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

Estimates from the block-group level are aggregated to county/utility and whole utility level, among other aggregations. Annually, SDG&E applies county/utility level eligibility fractions to a new set of “technical eligibility counts” (for CARE these are metered and sub-metered occupied housing units) obtaining an estimate of income/demographic eligibility in

⁷⁰ See, See, Federal Register / Vol. 87, No. 14 / January 21, 2022 / Notices, pps. 3315-3316.

household count form. SDG&E counts the number of households (by small area, by county, and overall) that are enrolled in FERA. The FERA household total, including individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility.

4.1.4 Provide the Current FERA Sub-Metered Tenant Counts At Year-End.

At year-end 2022, SDG&E had 74 sub-metered tenants participating in FERA.

4.1.5 Discuss Any Problems Encountered During the Reporting Period Administering the FERA Program for Sub-Metered Tenants and/or Master-Meter Customers.

In 2022, SDG&E experienced a processing backlog and system issue that impacted some FERA customers. Further details on this matter can be found under Section 2 - CARE Executive Summary.

4.2 Program Costs

4.2.1 Discount Cost

4.2.1.1 State the Average Monthly FERA Discount Received, In Dollars Per FERA Customer.

The average monthly FERA discount per customer in program year 2022 was \$27.58.

4.2.1.2 State the Cumulative Annual Discount for All FERA Customers.

The cumulative annual FERA Program discount provided to all FERA customers in program year 2022 was \$4,692,214.

4.2.2 Administrative Costs

4.2.2.1 Show the FERA Program’s administrative cost by category.

Table 3	
FERA Program Administrative Costs by Category and Benefits	
Category	Cost
Outreach	\$182,036
Processing, Certification, and Recertification	\$17,294
Post Enrollment Verification	\$876
IT Programming	\$22,110
Pilots	\$0
Measurement & Evaluation	\$0
Regulatory Compliance	\$52,109
General Administration	\$26,908
CPUC Energy Division	\$8,095
TOTAL PROGRAM COSTS	\$309,428
CUSTOMER DISCOUNTS	\$4,692,214
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$5,001,642

4.2.2.2 Explain what is included in each administrative cost category.

Outreach

The cost of outreach includes CBO partnerships and the costs to generate enrollments through targeted email campaigns and third-party outreach such as live-phone campaigns and cross-promotion of the FERA Program with other assistance programs.

Processing, Certification, and Verification

Costs in this category include staff labor related to processing applications and customer contact center activities, including, but not limited to, the following:

- Scanning and indexing applications;
- Processing FERA applications;
- Initiating and responding to customer inquiries regarding FERA applications/program;

- Fielding telephone calls related to FERA Program participation; and
- Resolving FERA Program enrollment issues.

General Administration

General administration costs include labor associated with program management and day-to-day operations.

Customer Benefits

Customer benefits include the value of the FERA discounts provided to customers.

4.2.2.3 Explain how costs of joint CARE/FERA activities are charged to each program.

The costs of distinct CARE and FERA activities are charged separately to each program using separate source codes. To the extent possible, the costs of joint CARE and FERA activities are allocated in proportion to the work that was attributable to either CARE or FERA.

4.2.2.4 Provide the year-end December 31 balances for the FERA balancing account for both the current and prior reporting periods.

	2021	2022
FERA Balancing Account (FERABA) – Under-Collection	\$1,759,916	\$1,004,570

4.3 Outreach

4.3.1 Discuss Utility Outreach Activities and Those Undertaken By Third Parties On The Utility’s Behalf.

General Awareness

Pursuant to D.21-06-015, the Commission authorized a FERA specific marketing, education, and outreach budget effective in the second half of program year 2021.⁷¹ Accordingly, SDG&E launched the company’s first FERA-specific campaign in the fourth quarter of 2021 and

⁷¹ D.21-06-015 at OP 1.

continued into 2022. SDG&E leveraged traditional messaging, social media platforms, and paid search. SDG&E used a variety of factors to identify customers most likely to qualify for the FERA Program, which included the most current Athens Research Study and SDG&E's Residential Segmentation model.

Direct Mail

In 2022, SDG&E leveraged the success from the CARE bill comparison campaign by crafting a similar FERA specific comparison letter to potentially eligible FERA customers. For non-CCA customers without an email address on file, SDG&E sent a bill comparison letter showing customers what their bill could have been if the customer was enrolled in FERA. SDG&E sent 2,102 FERA bill comparison letters in the 2022 program year.

Email

In 2022, SDG&E sent 32,115 FERA bill comparison emails which garnered a 54% open rate and a 12% click-through rate. Additionally, 35,462 generic emails, with no bill comparison, were sent to CCA customers garnering a 6.9% click through rate and a 37% open rate.

Digital

SDG&E used an integrated online strategy to increase awareness and drive online submissions by using paid search and paid social. SDG&E digital ads were seen over 4 million times (impressions) throughout the year, with more than 17,000 customers clicking through to the FERA Program online application.

FERA Digital Advertising – 2022			
	Impressions	CTR	Conversions ⁷²
Paid Social	1,371,593	0.50%	N/A
Search	46,351	2.25%	73
Display	1,921,140	0.24%	649
Nextdoor	291,704	0.19%	N/A
E-Blast	182,500	2.14%	N/A
YouTube	223,220	0.03%	N/A

Social Media

FERA messaging was routinely included in SDG&E organic Facebook, Twitter, Instagram, and Nextdoor Customer Assistance Programs posts which includes FERA, CARE, and ESA Programs.

Partner Education & Outreach

For detailed information on CARE Capitation Agencies, Energy Solutions Partner Network, Community Engagement, and The Branch Offices and Customer Care Centers, please see section 2.4.1 above.

FERA Capitation Agencies

As stated in section above, SDG&E partners with 20 social service agencies to help reach and enroll the hardest-to-reach customers. The partnering organizations are in diverse low income communities serving multicultural/multilingual, access and functional needs, and Limited English Proficient (LEP) audiences. These partners contributed 17 FERA Program enrollments for 2022.

⁷²Conversions are customers who click from an ad through to the last page of the application and do not reflect if a customer finished the application or whether an application was accepted.

Energy Solutions Partner Network

SDG&E works closely with community-based organizations and other external groups to connect customers with programs and solutions related to company offerings collectively named the Energy Solutions Partner Network. The FERA Program is currently promoted in all outreach activities including events, presentations, social media messaging and training with the Partner Network. These engagement efforts included over 350 events and events and presentations. This year, there were two enrollments in the FERA Program and one recertification from this group. The County of San Diego Health and Human Services Agency (HHS) is also part of the Energy Solutions Partner Network and received 3 applications in the FERA Program in 2022.

Community Engagement

Events, Presentations, Workshops

Community outreach and engagement allow SDG&E to connect and directly engage customers with energy-saving solutions including FERA in the communities where they work and live. SDG&E has established relationships with non-profit organizations to deliver presentations, workshops, trainings, and participate at community events to assist SDG&E in securing enrollments through an organization that customers trust.

With these groups and the Energy Solutions Partner Network, SDG&E participated in over 430 events, including more than 30 multicultural events, presentations, and workshops to educate and reach over 21,000 people in the community.

Branch Offices and Customer Care Centers

SDG&E's Customer Care Centers assist upwards of 1,000,000 customers with a variety of energy inquiries each year via phone and chat. Customers are provided information about the FERA Program in both English and Spanish while waiting to speak with an Energy Service

Specialist (ESS) via the Interactive Voice Recognition System. Additionally, the outreach team collaborates with the branch offices and bill payment locations to educate customers on programs and services offices and assists customers with completing the online application during the branch office visit. If a customer states that they are not qualified for the CARE or ESA Programs, the ESS will offer the FERA program and explain the income guidelines and current certification requirements.

Outbound Calls

The Harris Group (THG) utilized the data analysis from the FERA prospect list and continued an outbound call campaign to reach out to potentially eligible customers who live in SDG&E's service territory. THG's outbound call campaign (Live Call Campaign) also included a FERA Recertification Campaign.⁷³ For 2022, the THG Live Call Campaign and FERA Recertification Campaign efforts resulted in 1,314 completed FERA applications, contributing to 1,174 new FERA enrollments, and 43 FERA recertifications.

4.3.2 Discuss Each of the Following:

4.3.2.1 How FERA customer data and other relevant program information is shared within the utility, for example, between its Energy Savings Assistance Program and other appropriate low income programs.

When an eligible online enrollment or recertification for the FERA Program is received, an ESA lead is automatically created if the customer is determined to be eligible based on the prior treated date. Upon an eligible income verification for the FERA Program, an ESA lead is automatically created stating "FERA Income Certified," notifying the outreach agency that the income eligibility process is not required. In turn, the system sends the FERA Program system

⁷³ As detailed in Advice Letter 3729-E/2967-G, effective May 1, 2021, SDG&E relaunched the recertification process for CARE, FERA, and MBL customers on July 1, 2021.

ESA eligibility information once an ESA enrollment is received. The FERA Program system determines if the customer will be auto-enrolled, income certified, or recertified based on their current FERA status.

4.3.2.2 Discuss barriers to participation encountered during the reporting period and steps taken to mitigate them.

SDG&E's FERA Program faces barriers to program participation and must constantly evaluate and sometimes shift its focus to determine ways to counteract these challenges. The main barrier to program participation is identifying FERA-eligible customers. Although SDG&E receives eligible population counts annually, it is challenging to find FERA-eligible customers to apply for the program. SDG&E will continue to explore ways to increase program participation and work with the other IOUs on ideas or pilots for program enrollment. Additionally, to gain a better understanding of barriers from the customer's perspective, SDG&E plans to launch its first FERA customer satisfaction survey in 2023.

4.4 Processing FERA Applications⁷⁴

4.4.1 Processing Self-Certification and Self-Recertification Applications (individual and sub-metered customers)

4.4.1.1 Provide the number of utility and third-party FERA self-certification and self-recertification applications provided, received, approved, denied, pending/never completed, or duplicates for the reporting period.

See FERA Table 4 in Appendix H.

4.4.2 Processing Random Post-Enrollment Verification Requests

4.4.2.1 Provide the total number of verifications requested, received, approved, denied, pending/never completed, or duplicates, for the reporting period.

See FERA Table 5 in Appendix H.

⁷⁴ The SDG&E FERA Application is a part of the Bill Discount Application that includes CARE.

4.5 Program Management

4.5.1 Discuss Issues and/or Events That Significantly Affected Program Management In the Reporting Period and How These Were Addressed.

In 2022, SDG&E experienced a processing backlog and system issue that impacted some FERA customers. Further details on this matter can be found under Section 2 - CARE Executive Summary.

4.5.2 Post Enrollment Verification to Provide Proof of Income.

SDG&E selects between 3% and 6% of the FERA-eligible enrolled customers each year for the PEV process. A probability score is applied to each account using Commission-approved Probability Model. Each month, accounts are randomly selected for PEV based on their probability score. A lower score suggests that the customer is less likely to be eligible. A customer selected for PEV is required to provide documentation of eligibility for continued participation in the FERA Program. The customer may satisfy this requirement by providing proof of earnings as determined by household member count and household income.

Customers are given 90 days to respond to a PEV request before they are removed from the FERA Program. If the customer provides acceptable documentation (even if responding after the deadline), they can remain enrolled or be re-enrolled in the FERA Program.

5. FUND SHIFTING

5.1 Report ESA Program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

In 2022, SDG&E shifted ESA funds between categories. SDG&E shifted excess funds from General Administration to cover overages of \$498 in Marketing and Outreach. See ESA Table 12 for the fund shift activity.

5.1.1 Report CARE Program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

During 2022, SDG&E shifted CARE funds in accordance with the rules set forth in D.21-06-015, which granted the IOUs authority to shift funds between CARE Program categories. SDG&E used excess funds from the Outreach and IT Programming categories to cover \$891,513 of overages in the Processing, Certification, Recertification and CHANGES Program categories.

5.1.2 Report FERA Program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

During 2022, SDG&E shifted FERA funds in accordance with the rules set forth in D.21-06-015, which granted the IOUs authority to shift funds between FERA Program categories. SDG&E used excess funds in the Outreach category to cover a total of \$11,869 in overages in the Processing, Certification & Recertification and Regulatory Compliance categories.

5.1.3 Was there any ESA Program, CARE Program or FERA Program fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 10.5.8.2 of D.21-06-015?

There was no ESA Program, CARE Program, or FERA Program fund shifting activity that occurred that falls outside the rules laid out in Section 10.5.8.2 of D.21-06-015.

6. COMMONLY USED ACRONYMS

CAM	Common Area Measures
CARE	California Alternate Rates for Energy
CBO	Community-Based Organization
CFL	Compact Fluorescent Lamp
COVID-19	Coronavirus Disease 2019
CPUC	California Public Utilities Commission
CSI	California Solar Initiative
D.	Decision
CSD	California Department of Community Services & Development
DDTP	Deaf and Disabled Telecommunications Program
DRP	Demand Response Program
DSM	Demand Side Management
EE	Energy Efficiency
ESA	Energy Savings Assistance
EECP	Energy Efficiency Collaboration Platform
FERA	Family Electric Rate Assistance
HEAT	Home Energy Assistance Tracking
HEU	High Energy Users
IHD	In Home Display
IOU	Investor-Owned Utilities
IS	Installation Standards
kW	Kilowatt
kWh	Kilowatt Hour
LIEE	Low Income Energy Efficiency
LIHEAP	Low Income Home Energy Assistance Program
LINA	Low Income Needs Assessment
MFEER	Multifamily Energy Efficiency Rebate
MIDI	Middle Income Direct Install
MOU	Memorandum of Understanding
MW	Megawatt
MWh	Megawatt Hour
NEBs	Non-Energy Benefits
NGAT	Natural Gas Appliance Testing
NMEC	Normalized Metered Energy Consumption
OP	Ordering Paragraph
PCT	Programmable Communicating Thermostat
PEV	Post Enrollment Verification
PFM	Petition for Modification
PG&E	Pacific Gas and Electric Company
PPP	Public Purpose Program

PY	Program Year
SASH	Single Family Affordable Homes
SCE	Southern California Edison Company
SDG&E	San Diego Gas & Electric Company
SoCalGas	Southern California Gas Company
SOMAH	Solar on Multifamily Affordable Housing
SPOC	Single Point of Contact
SSI	Supplemental Security Income
SSD	Supplemental Security Disability
SSP	Social Security Pension
SWG	Sub-Working Group
TDD	Telecommunications Device for the Deaf
TOU	Time of Use
TRC	Total Resource Cost Test
UAS	Universal Application System
UC	Utility Costs
WET	Workforce, Education, and Training
WG	Working Group

Appendix A – Low Income Programs 2022 Ethnic Media Costs

Ethnic Print		
Audience	Readership	Total Spend
Spanish	1,580,323	\$17,386
Chinese	80,000	\$2,800
Vietnamese	90,000	\$2,000
Filipino	375,000	\$3,960
African American	325,000	\$4,553
Totals	2,450,323	\$30,699

Ethnic Television/OTT		
Audience	Impressions	Total Spend
Spanish	3,418,981	\$62,457
African American	254,294	\$8,000
AAPI	254,294	\$8,000
Totals	3,927,569	\$78,457

Ethnic Influencers		
Audience	Impressions	Total Spend
African American	270,800	\$2,500
Vietnamese	80,000	\$3,000
Totals	350,800	\$5,500

Ethnic Digital		
Audience	Impressions	Total Spend
Spanish	4,127,828	\$47,390

Total 2022 Ethnic Spend	\$162,046
--------------------------------	------------------

Appendix B – CARE TV Samples

CARE TV Spot :30 Seconds English: <https://youtu.be/aK3aG7YdKLY>

CARE TV Spot :30 Seconds Spanish: <https://youtu.be/OKuGcj7dGww>

Appendix C - Structure ESA Email & Direct Mail Samples



Get no-cost home improvements that
can help lower your SDG&E® bill

Save and enjoy a more comfortable home!

If you qualify, our authorized contractors will come to your home and may provide:

- New home appliances*
- Repair or replacement of doors
- Insulation, weatherstripping and caulking to lower heating and cooling costs
- Energy-efficient lighting
- Smart Thermostats

To see if you qualify

call **1-866-597-0597**

or visit sdge.com/esap

Energy Savings
.....
Assistance Program*

*Existing appliances must meet age requirements to qualify for replacement.

This program is funded by California utility customers and administered by San Diego Gas & Electric® under the auspices of the California Public Utilities Commission. Energy improvements completed under this program are made by third-party providers contracted by SDG&E. SDG&E is not responsible for any goods and services obtained by customers.

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Appendix D – CARE & ESA Print Samples



**RECIBA AYUDA
PARA LA ENERGÍA**

Ahorre un 30% en su factura de energía



De vez en cuando, todos pueden beneficiar de ayuda energética. Es por eso que SDG&E ofrece CARE, un programa de descuento que ofrece ahorros en su factura de energía. La elegibilidad está determinada por los ingresos familiares y la cantidad de personas en su hogar. Solicitarlo es fácil y confidencial.

Obtenga más información y vea si califica en sdge.com/CARE.



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RECIBA AYUDA PARA LA ENERGÍA

Con mejoras en el hogar
sin costo para ahorrar energía



El Programa de Asistencia de Ahorros de Energía (Energy Savings Assistance, ESA) de SDGE ofrece mejoras especiales en el hogar a quienes califican. Podría recibir mejoras de eficiencia energética sin costo que harán que su hogar sea más cómodo, más eficiente y más económico durante los próximos años.

Obtenga más información y vea si califica en sdge.com/ESA





NHẬN TRỢ GIÚP NĂNG LƯỢNG

Tiết kiệm 30% hóa đơn tiền điện của bạn



Ai cũng có thể thỉnh thoảng sử dụng trợ giúp năng lượng. Đó là lý do tại sao SDGE cung cấp CARE — một chương trình chiết khấu cho phép tiết kiệm hóa đơn năng lượng của bạn. Khả năng đã điều kiện được xác định theo thu nhập hộ gia đình và số người trong nhà của bạn. Áp dụng đơn giản và bảo mật.

Tìm hiểu thêm và xem bạn có đủ điều kiện hay không tại sdge.com/CARE.



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Appendix E – CARE and FERA Email Samples

You could have saved at least 30% last year if you were on CARE – [Apply now](#)



Apply for a 30% bill discount

SIGN UP FOR CARE

Save with the CARE discount

Your household may qualify for the CARE program, which can save you at least 30% on your energy bill.



Interested in saving?

APPLY TODAY

Act now. Visit sdge.com/care or call [1-877-646-5525](tel:1-877-646-5525)

Qualified residential customers may also be eligible for financial assistance to help reduce outstanding account balances through SDG&E's Arrearage Management Payment (AMP) Plan. For details, visit sdge.com/AMP.

[CARE](#) | [APPLY](#) | [ASSISTANCE](#) | [CONTACT](#)



You may qualify for a bill discount

Save 18% on your monthly electric bill with FERA - [apply now](#)



Save 18% on your electric bill

APPLY TODAY

Get an energy assist



We recognize this is still a challenging time for many customers and we want to help. Even if you have never qualified for assistance before, you may be eligible for a monthly bill discount now.

Applying is easy!

- Check the income eligibility guidelines below
- Locate your 12-digit account number (it can be found on your SDGE bill)
- No additional documentation is needed
- Applications are quick and confidential

People in Household	Total Household Income
2	\$46,200 - \$57,375
4	\$55,500 - \$69,375
5	\$64,940 - \$81,375
6	\$74,380 - \$92,875
7	\$83,820 - \$104,375
8	\$93,260 - \$116,375
Each Additional Person	\$9,640 - \$11,800

Lower limit calculation=20% of Federal Poverty Guidelines (FIRE 450) *2
*Upper limit calculation=250% of Federal Poverty Guidelines

START SAVING

You may be eligible for additional assistance programs. To learn more, visit sdge.com/assistance.

Appendix F – CARE and FERA Direct Mail Samples



How much could you have saved on your energy bill?

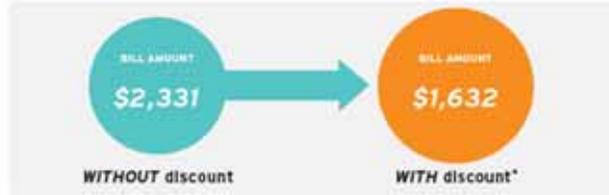
November 8, 2022

[Redacted address]

Account number: [Redacted]

Dear [Redacted]

You may qualify to save 30% or more on your energy bill through our CARE program. Here's how much you could have saved over the last 12 months on your energy use at [Redacted].



Based on 6,692 kilowatt hours over the last 12 months

Based on your energy use, you could have saved approximately \$699* on your bill. Get your savings now. Sign up at sdge.com/care or call 1-877-646-5525 to see if you qualify.

Qualified residential CARE customers may also be eligible for financial assistance to help reduce outstanding account balances through SDG&E's Arrearage Management Payment (AMP) Plan. For details, visit sdge.com/AMP.

Sincerely,

Pedro Ramirez
Customer Assistance Programs

Qualification is based on income or participation in certain public assistance programs. High energy use could result in removal from the program.

*Based on your energy use over the past 12 months with an average CARE discount of 30% applied. Seasonal rates may not be reflected in calculated amount.

00022



How much could you have saved on your electric bill?

December 28, 2022

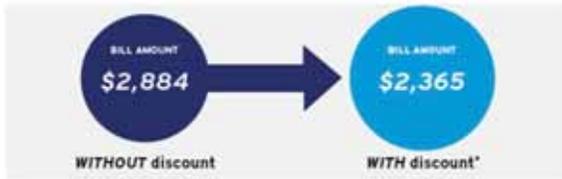
[Redacted address]

Account number: [Redacted]

Dear [Redacted],

SDGE recognizes that this is still a challenging time for many customers and wants to help. Even if you have never qualified for assistance before, you may be eligible now.

Your household may qualify for the FERA discount, which can save you 18% on your electric bill. Here's how much you could have saved over the last 12 months on your electric use at [Redacted]



Based on your electric use over the last 12 months, you could have saved approximately \$519.* Get your savings now. Applying is quick and confidential. Sign up at sdge.com/FERA.

Qualified residential FERA customers may also be eligible for financial assistance to help reduce outstanding account balances through SDGE's Arrearage Management Payment (AMP) Plan.

For details visit sdge.com/FERA or call 1-877-646-5525 to see if you qualify.

Sincerely,

Pedro Ramirez
Customer Assistance Programs

*Based on your personal electric use over the past 12 months with a FERA electric discount of 18% applied. Seasonal rates may not be reflected in calculated discount. Qualification is based on household income.

00000

Appendix G – NMEC Results for ESA CAM

Annual Electric Energy Savings from NMEC Analysis by Site

Site	Ex Ante kWh Savings	%	Avoided kWh Usage (First Year)	%	Normalized kWh Savings	%	Caveats for Reliability
C001	10,496	3%	21,705	6%	22,269	7%	
C002	6,237	39%	2,280	14%	2,148	13%	
C003	1,189	4%	55	0%	170	1%	NRA > <i>ex ante</i> savings
C004	13,195	27%	5,051	10%	4,681	10%	
C005	12,807	10%	7,617	6%	6,863	5%	
C006	18,318	6%	42,408	15%	43,662	15%	
C007	15,148	3%	40,917	9%	38,829	9%	NRA > <i>ex ante</i> savings
C008	38,779	62%	16,734	27%	17,240	28%	
C009	30,980	46%	2,540	4%	1,825	3%	
C010	1,386	3%	6,956	14%	6,946	14%	
C011	17,662	124%	1,865	13%	2,193	15%	Missing streams; weak r-square
C012	25,054	8%	31,615	11%	28,491	10%	Weak r-square
C013	17,028	35%	14,432	30%	13,781	29%	
C014	83,907	6%	96,908	7%	93,838	6%	
C015	9,521	16%	-5,380	-9%	-5,430	-9%	
C016	3,431	3%	464	0%	1,108	1%	NRA > <i>ex ante</i> savings
C017	18,176	9%	15,431	8%	16,748	9%	
C018	16,840	16%	18,151	17%	17,796	17%	
C019	22,785	14%	-572	0%	-1,442	-1%	
C020	6,183	392%	-100	-6%	-141	-9%	Missing streams; failed NMEC baseline criteria

Annual Gas Energy Savings from NMEC Analysis by Site

Site	Ex Ante therm Savings	%	Avoided therm Usage (First Year)	%	Normalized therm Savings	%	Caveats for Reliability
C003	2,476	34%	-326	-5%	-389	-6%	NRA > <i>ex ante</i> savings
C005	4,933	33%	-1,101	-7%	-1,239	-9%	
C014	1,115	3%	3,855	12%	4,203	13%	High FSU
C016	9,320	58%	660	4%	544	6%	
C018	2,172	62%	508	15%	445	13%	Weak r-square
C019	855	7%	635	5%	580	5%	NRA > <i>ex ante</i> savings; high FSU

Appendix H - ESA, CARE, and FERA Program Tables

Summary Highlights – ESA, CARE, and FERA Programs

ESA Program Summary Table 1 – Overall Program Expenses and Energy and Demand Savings

ESA Program – Table 1 – ESA Main Overall Program Expenses

ESA Program – Table 1A – ESA MFWB Program Expenses

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

ESA Program – Table 1A-2 – Building Electrification Program Expenses

ESA Program – Table 1A-3 – Clean Energy Homes Program Expenses

ESA Program – Table 1A-4 – CSD Leveraging Program Expenses

ESA Program – Table 2 – ESA Main Expenses & Energy Savings by Measures Installed

ESA Program – Table 2A – MF CAM Expenses & Energy Savings by Measures Installed

ESA Program – Table 2B – ESA MFWB Expenses & Energy Savings by Measures Installed

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

ESA Program – Table 2D – Building Electrification Expenses & Energy Savings by Measures Installed

ESA Program – Table 2E – Clean Energy Homes Expenses & Energy Savings by Measures Installed

ESA Program – Table 2F – CSD Leveraging Expenses & Energy Savings by Measures Installed

ESA Program – Table 3 – Cost Effectiveness

ESA Program – Table 4 – Detail By Housing Type and Source

ESA Program – Table 5 – Direct Purchases & Installation Contractors

ESA Program – Table 6 – Installation Cost of Program Installation Contractors

ESA Program – Table 7 – Expenditures by Cost Elements

ESA Program – Table 8 – Homes Unwilling/Unable to Participate

ESA Program – Table 9 – ESA Main - Life Cycle Bill Savings by Measure

ESA Program – Table 9A – MF CAM - Life Cycle Bill Savings by Measure

ESA Program – Table 9B – Pilot Plus and Pilot Deep - Life Cycle Bill Savings by Measure

ESA Program – Table 9C – Building Electrification - Life Cycle Bill Savings by Measure

ESA Program – Table 10 – Energy Rate Used for Bill Savings Calculations

ESA Program – Table 11 – Bill Savings Calculations by Program Year

ESA Program – Table 12 – Fund Shifting

ESA Program – Table 13 – Categorical Enrollment

ESA Program – Table 14 – Leveraging and Integration

ESA Program – Table 14A – Clean Energy Referral, Leveraging, and Coordination

ESA Program – Table 15 – Expenditures for Pilots and Studies

ESA Program – Table 16 – ESAP Tribal Outreach

ESA Program – Table 17 – Customer Segments/Needs State by Demographic, Financial,
Location, and Health Conditions

CARE Program – Table 1 – CARE Overall Program Expenses

CARE Program – Table 2 – CARE Enrollment, Re-certification, Attrition, and Enrollment Rate

CARE Program – Table 3A – CARE Post Enrollment Verification Results (Model)

CARE Program – Table 3B – CARE Post Enrollment Verification Results (High Usage)

CARE Program – Table 4 – Self Certification and Re-Certification

CARE Program – Table 5 – Enrollment by County

CARE Program – Table 6 – Re-certification Results

CARE Program – Table 7 – Capitation Contractors

CARE Program – Table 8 – Participants per Month

CARE Program – Table 9 – Average Monthly Usage & Bill

CARE Program – Table 10 – CARE Surcharge & Revenue

CARE Program – Table 11 – CARE Capitation Applications

CARE Program – Table 12 – CARE Expansion Program

CARE Program – Table 13 – CARE High Usage Verification Results

CARE Program – Table 13A – CARE Customer Usage and ESA Program Treatment

CARE Program – Table 14 – CARE Categorical Enrollment

CARE Program – Table 15 – CARE and Disadvantage Communities Enrollment Rate for Zip Codes

FERA Program – Table 1 – FERA Overall Program Expenses

FERA Program – Table 2 – FERA Enrollment, Re-certification, Attrition, and Enrollment Rate

FERA Program – Table 3A – FERA Post Enrollment Verification Results (Model)

FERA Program – Table 3B – FERA Post Enrollment Verification Results (High Usage)

FERA Program – Table 4 – Self Certification and Re-Certification

FERA Program – Table 5 – Enrollment by County

FERA Program – Table 6 – Re-certification Results

FERA Program – Table 7 – Capitation Contractors

FERA Program – Table 8 – Average Monthly Usage & Bill

FERA Program – Table 9 – CARE Surcharge & Revenue

San Diego Gas & Electric
Energy Savings Assistance Program
California Alternate Rates for Energy Program
And
Family Electric Rate Assistance Program
2022 Summary Highlights

ESA Program			
2022 Energy Savings Assistance Program Summary ¹			
2022	Authorized / Forecasted Planning Assumptions	Actual	%
Budget ²	\$ 25,832,330	\$ 14,497,434	56%
Funded from 2009-2022 Unspent Funds ³	\$ 4,261,527	\$ 1,453,499	34%
Summary Homes Treated	13,760	12,662	92%
Summary kWh Saved	2,955,161	1,638,311	55%
Summary kW Demand Reduced	428	133	31%
Summary Therms Saved	127,171	1,918	2%

¹ This includes all programs for the reporting period Main ESA, MF In-Unit, MF CAM, MFWB, Pilot Plus and Pilot Deep, Building Electrification, Clean Energy Homes, CSD
² Total budget as authorized in D.21-06-015, Attachment 1.
³ Decision 21-06-015 directs the IOUs to use unspent and uncommitted MF CAM funds for program years 2022 and 2023 until transition to the Multifamily Whole Building program is implemented.

CARE Program			
2022 CARE Program Summary			
2022	Authorized Budget	Actual	%
Administrative Expenses ¹	\$ 6,741,045	\$ 5,645,026	84%
Subsidies ²	\$ 165,211,754	\$ 228,617,353	138%
Service Establishment Charge	\$ -	\$ -	n/a
Total Program Costs and Discounts	\$ 171,952,799	\$ 234,262,379	136%
2022 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Income or Categorically Eligible	Self Certified as Recertification
Method	1,242	70,319	59,404
2022 CARE-Enrollment Rate	Estimated Eligible Participant	Participants	Enrollment Rate
Total Enrolled	289,316	355,600	123%

¹ Total budget as authorized in D.21-06-015, Attachment 1, Table 2.
² CARE Rate Discount (Subsidies) budget amount reflected in Advice Letters 3928-E & 3849-E and 3027-G-A, effective January 1, 2022.

FERA Program			
2022 FERA Program Summary			
2022	Authorized Budget	Actual	%
Administrative Expenses ¹	\$ 703,150	\$ 309,428	44%
Subsidies ²	\$ 3,711,343	\$ 4,692,214	126%
Service Establishment Charge	\$ -	\$ -	n/a
Total Program Costs and Discounts	\$ 4,414,493	\$ 5,001,642	113%
2022 FERA New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Income or Categorically Eligible	Self Certified as Recertification
Method	35	2,336	819
2022 FERA-Enrollment Rate	Estimated Eligible Participant	Participants	Enrollment Rate
Total Enrolled	43,709	12,248	28%

¹ Total budget as authorized in D.21-06-015, Attachment 1, Table 4.
² FERA Discount (Subsidies) budget amount reflected in Advice Letters 3928-E and 3849-E, effective January 1, 2022.

**San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
Summary Table 1 Expenses**

FSA Program:	Authorized Budget			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Main Program (SF and MH) ¹	\$ 12,825,370	\$ 11,780,277	\$ 24,305,647	\$ 7,170,136	\$ 7,199,618	\$ 14,369,754	57%	61%	59%
ESA Multifamily In-Unit ²	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
ESA Multifamily Common Area Measures ³	\$ 3,106,970	\$ 1,154,557	\$ 4,261,527	\$ 1,052,905	\$ 400,594	\$ 1,453,499	34%	35%	34%
ESA Multifamily Whole Building ⁴	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
ESA Pilot Plus and Pilot Deep ⁵	\$ 763,342	\$ 763,342	\$ 1,526,683	\$ 63,840	\$ 63,840	\$ 127,680	8%	8%	8%
Building Electrification Retrofit Pilot ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
Clean Energy Homes New Construction Pilot ⁴	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
CSD Leveraging	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
SASH and MASH Unspent Funds ⁷	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			0%
ESA Program TOTAL	\$ 16,395,682	\$ 13,698,176	\$ 30,093,857	\$ 8,286,881	\$ 7,664,052	\$ 15,950,933	51%	56%	53%

¹ Budget for PY 2022 for entire portfolio, including ESA Main and MF in-unit. Total budget as authorized in D.21-06-015, Attachment 1.

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

³ Budget for Multifamily Common Area Measures authorized through SDG&E Advice Letter 3820-L/3004-G.

⁴ ESA Multifamily Whole Building implementation to occur no earlier than January 2023.

⁵ Total budget as authorized in D.21-06-015, Attachment 1. SDG&E Pilot Plus Pilot Deep expenses are for administrative cost incurred to facilitate the implementation of the pilot.

⁶ Pilots are applicable to SCE only.

⁷ OP 12 of D.15-01-027 states "The Program Administrators shall ensure that program expenditures in each utility's service territory do not exceed the total authorized budget amounts over the duration of the programs. The program incentive budgets will be available until all funds are exhausted or until December 31, 2021, whichever occurs first. Any money unspent and unencumbered on January 1, 2022, shall be used for "cost-effective energy efficiency measures in low-income residential housing that benefit ratepayers," as set forth in Public Utilities Code Section 2852(c)(3)." The electric IOUs plan to file a Joint Advice Letter for disposal of unspent funds from the SASH and MASH programs to the ESA Program. Joint IOUs plan to file Advice Letter in Quarter 2 of 2023. After the Advice Letter is filed, budget authorization will be pending per Energy Division disposition of Advice Letter.

**San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
Summary Energy and Demand Savings**

FSA Program:	Authorized / Forecasted Planning Assumptions			Actual			%		
	kWh	kW	Therms	kWh	kW	Therms	kWh	kW	Therms
ESA Main Program (SF and MH) ¹	2,855,161	428.00	127,171	795,183	59	(4,653)	27%	4%	-4%
ESA Multifamily In-Unit ²				484,863	20	5,083	16%	3%	4%
ESA Multifamily Common Area Measures				358,265	54	1,488	12%	13%	1%
ESA Multifamily Whole Building ³									
ESA Pilot Plus and Pilot Deep				0	0	0	0%	0%	0%
Building Electrification Retrofit Pilot ⁴				0	0	0	0%	0%	0%
Clean Energy Homes New Construction Pilot ⁴									
CSD Leveraging				0	0	0	0%	0%	0%
ESA Program TOTAL	2,855,161	428.00	127,171	1,638,311	133	1,918	55%	31%	2%

1. Energy and demand savings for PY 2022 includes ESA Main and MF in-unit.

2. The ESA Multifamily In-Unit energy and demand savings are included in the ESA Main Program category.

3. Implementation to occur no earlier than January 2023.

4. Pilots are applicable to SCE only.

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
 ESAP Table 1A
 Summary Program Expenses

ESA Table 1A - Multifamily Whole Building Expenses

ESA Program (MF-WB):	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Multifamily In-Unit ¹			\$ -	\$ -	\$ -	\$ -			
ESA Multifamily Common Area Measures ²	\$ 3,106,970	\$ 1,154,557	\$ 4,261,527	\$ 1,052,905	\$ 400,594	\$ 1,453,499	34%	35%	34%
ESA Multifamily Whole Building ³			\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ 3,106,970	\$ 1,154,557	\$ 4,261,527	\$ 1,052,905	\$ 400,594	\$ 1,453,499	34%	35%	34%

¹ Budget is included in ESA Main Program.

² D.21-06-015 directs the IOUs to carry forward all unspent and uncommitted ESA Common Area Measures funding as of June 30, 2021 into the remainder of program year 2021 and 2022. The unspent funds remaining at the end of December 31, 2021 was \$4,261,527 to be used for 2022.

³ D.21-06-015, OP 123 direct that the Southern MFWB Program must begin implementation no sooner than January 1, 2023.

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

	2022 Authorized / Forecasted Budget ⁴			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Pilot Plus and Pilot Deep Program	\$ 783,342	\$ 783,342	\$ 1,526,683	\$ 63,840	\$ 63,840	\$ 127,680	8%	8%	8%
TOTAL	\$ 783,342	\$ 783,342	\$ 1,526,683	\$ 63,840	\$ 63,840	\$ 127,680	8%	8%	8%

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

ESA Table 1A-2 - Building Electrification Expenses⁵

	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Building Electrification Program			\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%

⁵ Pilots is applicable to SCE only.

ESA Table 1A-3 - Clean Energy Homes Expenses⁶

	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Clean Energy Homes Program			\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%

⁶ Pilots is applicable to SCE only.

ESA Table 1A-4 - Leveraging - CSD Expenses

	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Program Leveraging - CSD			\$ -	\$ -	\$ -	\$ -			
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%

**San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 2
ESAP Main Expenses and Energy Savings by Measures Installed (SF, MH, MF In-Unit)**

Measures	Basic	Plus	Units	ESA Program Main Total					
				2022 Completed & Expensed Installation					
				Quantity Installed	kWh ⁴ (Annual)	kW ⁴ (Annual)	Therms ⁴ (Annual)	Expenses (\$)	% of Expenditures
Appliances									
High Efficiency Clothes Washer			Each	152	212	0	2,029	\$ 150,957	1.5%
Refrigerator			F acn	697	371,317	45	-	\$ 821,675	7.9%
Microwave			Each	-	-	-	-	\$ -	0.0%
New - Freezer			Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water									
Other Domestic Hot Water ⁵			Home	3,737	15,726	2	14,938	\$ 318,089	3.1%
Water Heater Tank and Pipe Insulation			Home	576	6,728	-	(1,175)	\$ 55,096	0.5%
Water Heater Repair/Replacement			F acn	771	-	-	1,589	\$ 676,640	6.5%
Combined Showerhead/TSV			Each	45	244	0	224	\$ 3,071	0.0%
New - Heat Pump Water Heater			Each	-	-	-	-	\$ -	0.0%
New - Tub Divertor/ Tub Spout			Each	1	-	-	9	\$ 113	0.0%
New - Thermostat controlled Shower Valve			Each	-	-	-	-	\$ -	0.0%
Enclosure									
Air Sealing ¹			Home	4,255	(27,960)	(6)	(10,688)	\$ 2,104,089	20.2%
Caulking			Home	-	-	-	-	\$ -	0.0%
Attic Insulation			Home	99	5,160	1	3,028	\$ 147,418	1.4%
HVAC									
FAU Standing Pilot Conversion			Each	-	-	-	-	\$ -	0.0%
Furnace Repair/Replacement			F acn	1,233	-	-	(6,894)	\$ 1,328,034	12.8%
Room A/C Replacement			Each	188	(58,791)	(8)	-	\$ 183,777	1.8%
Central A/C replacement			F acn	-	-	-	-	\$ -	0.0%
Heat Pump Replacement			Each	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Replacement)			Each	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Installation)			Each	-	-	-	-	\$ -	0.0%
Dust Toss and Seal			Home	141	1,215	0	576	\$ 30,972	0.3%
Energy Efficient Fan Controls			Home	-	-	-	-	\$ -	0.0%
Prescriptive Duct Sealing			Home	-	-	-	-	\$ -	0.0%
High Efficiency Forced Air Unit (HE FAU)			Home	-	-	-	-	\$ -	0.0%
A/C Time Delay			Home	-	-	-	-	\$ -	0.0%
Smart Thermostat			Home	143	5,890	-	395	\$ 33,008	0.3%
Maintenance									
Furnace Clean and Tune			Home	-	-	-	-	\$ -	0.0%
Central A/C Tune up			Home	-	-	-	-	\$ -	0.0%
Lighting									
Interior Hard wired LED fixtures			Each	1,033	37,444	1	(440)	\$ 89,514	0.9%
Exterior Hard wired LED fixtures			Each	329	1,691	0	-	\$ 24,674	0.2%
LED Torchiere			Each	1	2	0	(0)	\$ 98	0.0%
Occupancy Sensor			F acn	-	-	-	-	\$ -	0.0%
LED Night Light			Each	-	-	-	-	\$ -	0.0%
New - LED R/R Lamps			F acn	6,460	19,509	2	(299)	\$ 104,820	1.0%
New - LED A-Lamps			Each	77,900	164,936	20	(2,861)	\$ 1,149,909	11.1%
Miscellaneous									
Pool Pumps			F acn	2	2,074	-	-	\$ 4,300	0.0%
Smart Strip			Each	1,184	95,912	13	-	\$ 48,076	0.5%
Smart Strip Tier II			F acn	3,364	638,736	8	(1)	\$ 237,192	2.3%
Pilots									
Customer Enrollment									
ESA Outreach & Assessment			Home	12,921	-	-	-	\$ 2,483,134	23.9%
FSA In-Home Energy Education			Home	12,920	-	-	-	\$ 397,090	3.8%
Total Savings/Expenditures					1,700,046	70	430	\$ 10,401,746	
Total Households Weatherized ²			4063						
Households Treated									
- Single Family Households Treated			Home	4,998					
- Multi-Family Households Treated			Home	6,750					
- Mobile Homes Treated			Home	914					
Total Number of Households Treated			Home	12,662					
# Eligible Households to be Treated for PY³			Home	13,760					
% of Households Treated			%	92%					
- Master/Master Households Treated			Home	519					

ESA Program - Main	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ 2,026,862	\$ 2,026,860	\$ 4,053,722
Direct Implementation (Non-Incentive)	\$ -	\$ -	\$ -
Direct Implementation ⁴	\$ 5,143,274	\$ 5,172,758	\$ 10,316,032
TOTAL ESA Main COSTS	\$ 7,170,136	\$ 7,199,618	\$ 14,369,754

← indicates measures costs

¹ Envelopes and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.
² Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.
³ Based on D.21-06-015 Attachment 1, Table 6 targets.
⁴ Savings estimates are sourced from the PY 2015 to 2017 ESA Impact Evaluation; Energy Division instructed the IOUs to use these results for 2019 and 2020 savings estimates.
⁵ Other Domestic Hot Water includes the following parts: Faucet Aerator, Low Flow Showerhead, and Thermostatic shower valve.
⁶ Direct Implementation year to date expenses include the reimbursement of \$85,714 from San Diego County Water Authority (SDCWA).

San Diego Gas & Electric 2022 Energy Savings Assistance Program Annual Report
 ESAP Table 2A
 Multifamily Common Area Measures Initiative Expenses and Energy Savings by Measures Installed

ESA Program - Multifamily Common Area Measures								
	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTU/h and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
ESA MF CAM Measures¹								
Appliances								
Domestic Hot Water								
Central Boiler ²	Cap-kBTU/h	Y	-	-	-	2,218	\$ 119,098	16%
Faucet Aerator	Each	-	-	-	-	-	\$ -	0%
Pipe Insulation	Home	-	-	-	-	-	\$ -	0%
Envelope								
0%								
0%								
HVAC								
AC Tune-up ²	Cap-Tons	-	-	-	-	-	\$ -	0%
Furnace Replacements ²	Cap-kBTU/h	-	-	-	-	-	\$ -	0%
HEAT Pump Split System ²	Cap-Tons	-	-	-	-	-	\$ -	0%
HEAT Pump Split System	Each	8	-	284	0	-	\$ 90,720	12%
Programmable Thermostat	Each	2	-	2	-	-	\$ 727	0%
Lighting								
Exterior LED Lighting	Fixture	809	-	106,547	0	-	\$ 198,507	26%
Exterior LED Lighting - Foot	Lamp	-	-	-	-	-	\$ -	0%
Interior LED Exit Sign	Fixture	34	-	330	0	(1)	\$ 5,555	1%
Interior LED Fixture	Fixture	1,257	-	224,652	51	(617)	\$ 217,305	28%
Interior LED Lighting	KiloLumen	281	-	3,223	0	(10)	\$ 47,089	6%
Interior LED Screw-in	Lamp	92	-	3,859	1	(8)	\$ 1,196	0%
Interior TLED Type A Lamps	Lamp	4	-	27	0	(0)	\$ 78	0%
Interior TLED Type C Lamps	Lamp	618	-	11,243	0	(93)	\$ 24,427	3%
Miscellaneous								
Tier 2 Smart Power Strip	Each	-	-	-	-	-	\$ -	0%
Variable Speed Pool Pump	Each	1	-	8,100	1	-	\$ 4,332	1%
Ancillary Services								
Audit		31	-	-	-	-	\$ 53,696	7%
Total		3,137	-	358,265	54	1,488	\$ 762,730	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated ²	29
Subtotal of Master-metered Multifamily Properties Treated	14
Total Number of Multifamily Tenant Units w/in Properties Treated ²	1080
Total Number of buildings w/in Properties Treated	192

ESA Program - MF CAM	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ 44,946	\$ 44,946	\$ 89,892
Direct Implementation (Non-Incentive)	\$ 327,286	\$ 327,286	\$ 654,572
Direct Implementation	\$ 680,673	\$ 28,361	\$ 709,034
TOTAL MF CAM COSTS	\$ 1,052,905	\$ 400,594	\$ 1,453,499

<< Includes measures costs. Excludes audit ancillary services expenses

¹ Savings estimates are sourced from approved workpapers.

² This represents the unit of measure such as KiloLumen, Cap Tons and Cap kBTU/h. It is not a count of each measure installed or each home the measure was installed in.

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

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

San Diego Gas & Electric 2022 Energy Savings Assistance Program Annual Report
 ESAP Table 2B
 Multifamily Whole Building Expenses and Energy Savings by Measures Installed

ESA Program - Multifamily Whole Building								
Year-To-Date Completed & Expensed Installation								
	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTU/h and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
ESA MF WB Measures¹								
Appliances								
Domestic Hot Water								
Central Boiler ²	Cap-kBTU/h	-	-	-	-	-	\$ -	-
Faucet Aerator	Each	-	-	-	-	-	\$ -	-
Pipe Insulation	Home	-	-	-	-	-	\$ -	-
Envelope								
HVAC								
AC Tune-up ²	Cap-Tons	-	-	-	-	-	\$ -	-
Furnace Replacement ²	Cap-kBTU/h	-	-	-	-	-	\$ -	-
HEAT Pump Split System ²	Cap-Tons	-	-	-	-	-	\$ -	-
HEAT Pump Split System	Each	-	-	-	-	-	\$ -	-
Programmable Thermostat	Each	-	-	-	-	-	\$ -	-
Lighting								
Exterior LED Lighting	Fixture	-	-	-	-	-	\$ -	-
Exterior LED Lighting - Pool	Lamp	-	-	-	-	-	\$ -	-
Interior LED Exit Sign	Fixture	-	-	-	-	-	\$ -	-
Interior LED Fixture	Fixture	-	-	-	-	-	\$ -	-
Interior LED Lighting	KiloLumen	-	-	-	-	-	\$ -	-
Interior LED Screw in	Lamp	-	-	-	-	-	\$ -	-
Interior TLED Type A Lamps	Lamp	-	-	-	-	-	\$ -	-
Interior TLED Type C Lamps	Lamp	-	-	-	-	-	\$ -	-
Miscellaneous								
Tier-2 Smart Power Strip	Each	-	-	-	-	-	\$ -	-
Variable Speed Pool Pump	Each	-	-	-	-	-	\$ -	-
Auxiliary Services								
Audit		-	-	-	-	-	\$ -	-
Total		-	-	-	-	-	\$ -	-

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated ²	0
Subtotal of Master-metered Multifamily Properties Treated	0
Total Number of Multifamily Tenant Units w/in Properties Treated ³	0
Total Number of buildings w/in Properties Treated	0

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

<< Includes measures costs

Note: MF WB implementation to occur no earlier than January 2023.

¹ Savings estimates are sourced from approved workpapers.

² This represents the unit of measure such as KiloLumen, Cap Tons and Cap kBTU/h. It is not a count of each measure installed or each home the measure was installed in.

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

**Note: Implementation of the MF CAM Initiative AL 3198-E-A_2654-G-A was approved effective 5/30/2018.

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
 ESAP Table 2D
 ESAP Expenses and Energy Savings by Measures Installed - Building Electrification (SCE only)

ESA Program - Building Electrification Retrofit Pilot ¹						
Measures	Units	2022 Completed & Expensed Installation				
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)
						% of Expenditure
Appliances						
Electric Dryer	Each	-	-	-	-	0.0%
Heat Pump Dryer	Each	-	-	-	-	0.0%
Induction Cooktop	Each	-	-	-	-	0.0%
Induction Range	Each	-	-	-	-	0.0%
Domestic Hot Water						
Heat Pump Water Heater	Each	-	-	-	-	0.0%
Enclosure						
Attic Insulation	Home	-	-	-	-	0.0%
HVAC						
Heat Pump HVAC	Each	-	-	-	-	0.0%
Duct Seal	Each	-	-	-	-	0.0%
Smart Thermostat	Each	-	-	-	-	0.0%
Miscellaneous ²						
Minor Home Repair	Home	-	-	-	-	0.0%
Carbon Monoxide/Smoke Alarm	Each	-	-	-	-	0.0%
Electric Panel	Each	-	-	-	-	0.0%
Electric Sub-Panel	Each	-	-	-	-	0.0%
Electrical Circuit Run	Each	-	-	-	-	0.0%
Induction Cookware	Home	-	-	-	-	0.0%
Customer Enrollment						
Energy Assessment	Home	-	-	-	-	0.0%
Total Savings/Expenditures						
Households Treated						
Single Family Households Treated	Home					
Estimated Avg. Annual Bill Savings/Treated ³	Home					

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

<</includes measures costs

San Diego Gas & Electric 2022 Energy Savings Assistance Program Annual Report
 ESAP Table 2F
 ESAP Expenses and Energy Savings by Measures Installed - CSD Leveraging

Measures	Units	ESA Program - CSD Leveraging					
		Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances							
High Efficiency Clothes Washer	Each	-	-	-	-	\$ -	0.0%
Refrigerators	Each	-	-	-	-	\$ -	0.0%
Microwaves	Each	-	-	-	-	\$ -	0.0%
New - Freezer	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water							
Water Heater Blanket	Home	-	-	-	-	\$ -	0.0%
Low Flow Shower Head	Home	-	-	-	-	\$ -	0.0%
Water Heater Pipe Insulation	Home	-	-	-	-	\$ -	0.0%
Faucet Aerator	Home	-	-	-	-	\$ -	0.0%
Water Heater Repair/Replacement	Each	-	-	-	-	\$ -	0.0%
Thermostatic Shower Valve	Each	-	-	-	-	\$ -	0.0%
New - Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%
New - Tub Diverter/ Tub Spout	Each	-	-	-	-	\$ -	0.0%
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	\$ -	0.0%
Enclosure							
Air Sealing / Envelope	Home	-	-	-	-	\$ -	0.0%
Caulking	Home	-	-	-	-	\$ -	0.0%
Attic Insulation	Home	-	-	-	-	\$ -	0.0%
HVAC							
FAU Standing Pilot Conversion	Each	-	-	-	-	\$ -	0.0%
Furnace Repair/Replacement	Each	-	-	-	-	\$ -	0.0%
Room A/C Replacement	Each	-	-	-	-	\$ -	0.0%
Central A/C replacement	Each	-	-	-	-	\$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	\$ -	0.0%
Duct Testing and Sealing	Home	-	-	-	-	\$ -	0.0%
New - Energy Efficient Fan Control	Home	-	-	-	-	\$ -	0.0%
New - Prescriptive Duct Sealing	Home	-	-	-	-	\$ -	0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -	0.0%
New - A/C Time Delay	Home	-	-	-	-	\$ -	0.0%
Maintenance							
Furnace Clean and Tune	Home	-	-	-	-	\$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%
Lighting							
Compact Fluorescent Lights (CFL)	Each	-	-	-	-	\$ -	0.0%
Interior Hard wired CFL fixtures	Each	-	-	-	-	\$ -	0.0%
Exterior Hard wired CFL fixtures	Each	-	-	-	-	\$ -	0.0%
Torchiere	Each	-	-	-	-	\$ -	0.0%
Occupancy Sensor	Each	-	-	-	-	\$ -	0.0%
LED Night Lights	Each	-	-	-	-	\$ -	0.0%
New - LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	\$ -	0.0%
New - LED Reflector Bulb	Each	-	-	-	-	\$ -	0.0%
New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	\$ -	0.0%
New - LED A-Lamps	Each	-	-	-	-	\$ -	0.0%
Miscellaneous							
Pool Pumps	Each	-	-	-	-	\$ -	0.0%
Smart Power Strips - Tier 1	Each	-	-	-	-	\$ -	0.0%
New - Smart Power Strips - Tier 2	Each	-	-	-	-	\$ -	0.0%
Pilots							
Customer Enrollment							
Outreach & Assessment	Home					\$ -	0.0%
In-Home Education	Home					\$ -	0.0%
Total Savings/Expenditures						\$ -	0.0%
Total Households Weatherized							
CSD MF Buildings Treated							
			Total				
- Multifamily			0				

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

<< Includes measures costs

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
 ESAP Table 3
 Program Cost Effectiveness

Program	Ratio of Benefits Over Costs						Net Benefits \$		
	ESACET	Resource Test	TRC	PAC	RIM	ESACET	Resource Test	TRC	
ESA In-Unit (SF, MH, MF-In-Unit)	0.14	0.28	0.05	0.05	0.04	\$ (11,944,178)	\$ (3,672,136)	\$ (13,310,543)	
ESA MF CAM	N/A	N/A	0.15	0.15	0.11	N/A	N/A	\$ (1,210,221)	
ESA MFWB (MF In-Unit, MF CAM, MFWB)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
ESA Pilot Plus and Pilot Deep	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Building Electrification	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Clean Energy Homes	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	

Notes:

All program measures, including energy saving and health comfort & safety (HCS) measures, are included in the ESACET. Only energy saving measures are included in the Resource Test. Energy Saving and HCS measures are defined in Decision 21-06-015, page 254: "We decline requiring the IOUs to define which ESA measures are classified as energy saving (formerly "resource") or HCS (formerly "non-resource") measures beyond the current ad-hoc definition used by IOUs to define HCS measures as those having less than one kWh or one therm of annual energy savings."

The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs.

The Resource Test includes energy benefits and program measure and installation costs.

For ESA Main, energy savings are sourced from 1) the PY2015 to PY2017 ESA Impact Evaluation and 2) energy efficiency workpapers. For ESA CAM, energy savings are sourced from energy efficiency workpapers.

Ordering Paragraph 4.3 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC (renamed the Resource Test).

MFWB and ESA Pilot Plus and Deep were not implemented in program year 2022.

Building Electrification and Clean Energy Homes pilots are not implemented by SDG&E.

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
 ESAP Table 4
 Detail by Housing Type and Source¹

Customer	Housing Type	2022 Energy Savings ²				2022 Expenses
		# Homes /Properties Treated	(mWh)	MW	(mTherm)	
Gas and Electric Customers						
Owners - Total		2,953	410,566	0.030	(6,979)	\$ 5,774,016
	Single Family	1,875	332,023	0.035	(9,033)	\$ 3,437,651
	Multi Family	240	26,359	0.002	0,849	\$ 273,050
	Mobile Homes	838	52,185	(0.007)	1,204	\$ 2,063,316
Renters - Total		8,838	724,287	0.035	7,409	\$ 4,063,419
	Single Family	2,748	302,243	0.020	3,522	\$ 1,483,390
	Multi Family	6,060	420,743	0.016	4,233	\$ 2,549,099
	Mobile Homes	30	1,300	(0.000)	(0,347)	\$ 30,929
Electric Customers (only)						
Owners - Total		322	87,681	0.009	-	\$ 305,573
	Single Family	229	59,154	0.008	-	\$ 223,883
	Multi Family	55	10,464	0.001	-	\$ 48,376
	Mobile Homes	38	18,062	0.000	-	\$ 33,315
Renters - Total		549	57,512	0.005	-	\$ 258,737
	Single Family	146	27,802	0.003	-	\$ 85,570
	Multi Family	395	27,297	0.002	-	\$ 168,374
	Mobile Homes	8	2,413	0.000	-	\$ 4,793
Gas Customers (only)						
Owners - Total		-	-	-	-	\$ -
	Single Family	-	-	-	-	\$ -
	Multi Family	-	-	-	-	\$ -
	Mobile Homes	-	-	-	-	\$ -
Renters - Total		-	-	-	-	\$ -
	Single Family	-	-	-	-	\$ -
	Multi Family	-	-	-	-	\$ -
	Mobile Homes	-	-	-	-	\$ -
Gas and Electric Total - ESA MFWB						
ESA Multifamily In-Unit³						
ESA Multifamily Common Area Measures		29	358,265	0.054	1,489,4544	\$ 762,730
ESA Multifamily Whole Building ⁴						
Totals:		12,691	1,638	0.133	2	11,164,476

¹ Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging, and Building Electrification.

² Savings estimates for ESA treated homes are sourced from the PY 2015 to 2017 ESA Impact Evaluation. Savings for common area measures are sourced from approved work.

³ Included in ESA Main Program.

⁴ Implementation to occur no earlier than January 2023.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible Households Treated by Both Utilities in Shared Service Territory
2022	SoCalGas	15,784	5

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report ¹

ESAP Table 5

ESAP Direct Purchases & Installation Contractors

Contractor	County	Contractor Type				2022 Annual Expenditures
		Private	CBO	WMDVBE	LIHEAP	
American Eco Services, Inc.	San Diego	X		X		\$ 1,229,225
Campeños Unidos Inc.	San Diego		X	X	X	\$ 409,659
Capital State Construction	San Diego		X			\$ 507,533
Eagle Systems International Inc.	San Diego	X				\$ 1,090,785
Jerry's Heating & Air Conditioning, Inc.	San Diego	X				\$ 109,436
MAAC Project	San Diego		X	X	X	\$ 586,149
R&B Wholesale Distributor	San Diego	X				\$ 972,633
Richard Heath & Associates	San Diego	X		X		\$ 4,016,494
THA Heating and Air Conditioning Inc.	San Diego	X				\$ 1,479,833
Wildan Engineers and Constructors	San Diego	X				\$ 762,730
Total Contractor Expenditures						\$ 11,164,476

¹ Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging, Building Electrification, and Clean Energy Home.

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 7
Expenditures Recrossed by Cost Element ¹

ESA Program:	Labour	Non-Labour	Contractor	Total
Energy Efficiency				
ESA Main Program (SF, MH, MF In Unit)				
Appliances	\$ -	\$ -	\$ 960,640	\$ 960,640
Domestic Hot Water	\$ -	\$ -	\$ 979,279	\$ 979,279
Enclosure	\$ -	\$ -	\$ 2,251,507	\$ 2,251,507
HVAC	\$ -	\$ -	\$ 1,585,792	\$ 1,585,792
Maintenance	\$ -	\$ -	\$ -	\$ -
Lighting	\$ -	\$ -	\$ 1,389,015	\$ 1,389,015
Miscellaneous	\$ -	\$ -	\$ 289,568	\$ 289,568
Customer Enrollment	\$ -	\$ -	\$ 2,483,134	\$ 2,483,134
In Home Education	\$ -	\$ -	\$ 397,090	\$ 397,090
Multi-Family Common Area Measures ²				
Appliances	\$ -	\$ -	\$ -	\$ -
Domestic Hot Water	\$ -	\$ -	\$ 119,098	\$ 119,098
Enclosure	\$ -	\$ -	\$ -	\$ -
HVAC	\$ -	\$ -	\$ 91,447	\$ 91,447
Maintenance	\$ -	\$ -	\$ -	\$ -
Lighting	\$ -	\$ -	\$ 494,158	\$ 494,158
Miscellaneous	\$ -	\$ -	\$ 4,332	\$ 4,332
Customer Enrollment	\$ -	\$ -	\$ -	\$ -
In Home Education	\$ -	\$ -	\$ -	\$ -
Multi-Family Whole Building				
Appliances	\$ -	\$ -	\$ -	\$ -
Domestic Hot Water	\$ -	\$ -	\$ -	\$ -
Enclosure	\$ -	\$ -	\$ -	\$ -
HVAC	\$ -	\$ -	\$ -	\$ -
Maintenance	\$ -	\$ -	\$ -	\$ -
Lighting	\$ -	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -	\$ -
Customer Enrollment	\$ -	\$ -	\$ -	\$ -
In Home Education	\$ -	\$ -	\$ -	\$ -
Pilot Plus and Pilot Deep ³				
Appliances	\$ -	\$ -	\$ -	\$ -
Domestic Hot Water	\$ -	\$ -	\$ -	\$ -
Enclosure	\$ -	\$ -	\$ -	\$ -
HVAC	\$ -	\$ -	\$ -	\$ -
Maintenance	\$ -	\$ -	\$ -	\$ -
Lighting	\$ -	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -	\$ -
Customer Enrollment	\$ -	\$ -	\$ -	\$ -
In Home Education	\$ -	\$ -	\$ -	\$ -
Building Electrification (SCE Only)				
Appliances	\$ -	\$ -	\$ -	\$ -
Domestic Hot Water	\$ -	\$ -	\$ -	\$ -
Enclosure	\$ -	\$ -	\$ -	\$ -
HVAC	\$ -	\$ -	\$ -	\$ -
Maintenance	\$ -	\$ -	\$ -	\$ -
Lighting	\$ -	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -	\$ -
Customer Enrollment	\$ -	\$ -	\$ -	\$ -
In Home Education	\$ -	\$ -	\$ -	\$ -
Clean Energy Homes (SCE Only)				
CSD Leveraging				
Appliances	\$ -	\$ -	\$ -	\$ -
Domestic Hot Water	\$ -	\$ -	\$ -	\$ -
Enclosure	\$ -	\$ -	\$ -	\$ -
HVAC	\$ -	\$ -	\$ -	\$ -
Maintenance	\$ -	\$ -	\$ -	\$ -
Lighting	\$ -	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -	\$ -
Customer Enrollment	\$ -	\$ -	\$ -	\$ -
In Home Education	\$ -	\$ -	\$ -	\$ -
Energy Efficiency TOTAL	\$ -	\$ -	\$ 11,025,066	\$ 11,025,066
Training Center	\$ 14,374	\$ 4,788	\$ -	\$ 19,162
Workforce Education and Training	\$ -	\$ -	\$ -	\$ -
Inspections	\$ 141,667	\$ 134	\$ -	\$ 141,800
Marketing and Outreach	\$ 139,320	\$ 930,318	\$ -	\$ 1,069,638
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
Measurement and Evaluation Studies	\$ -	\$ 118,537	\$ -	\$ 118,537
Regulatory Compliance	\$ 208,621	\$ 82,723	\$ -	\$ 291,344
General Administration	\$ 1,357,478	\$ 991,465	\$ 1,127	\$ 2,350,070
CPUC Energy Division	\$ -	\$ 32,382	\$ -	\$ 32,382
SPOC	\$ 30,790	\$ -	\$ -	\$ 30,790
TOTAL PROGRAM COSTS	\$ 1,892,249	\$ 2,100,346	\$ 11,026,193	\$ 15,018,788

¹ Note that "below the line" summary costs (rows 70-79) includes ESA Main Program (SF, MH, MF In Unit) and does not include administrative cost for ESA CAM, MFWE, or Pilot Plus/Pilot Deep.

² SDG&E did not account for Multi-Family Common Area Measures (MF CAM) labor and non-labor expenses at this level of detail. MF CAM excludes non-contractor labor and non-labor expenditures of \$12,256 and \$108,513, respectively.

³ SDG&E did not account for Pilot Plus and Pilot Deep labor and non-labor expenses at this level of detail. Pilot Plus and Pilot Deep excludes non-contractor labor and non-labor expenditures of \$4,490 and \$123,190, respectively.

Note: MFWE implementation to occur no earlier than January 2023.

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
 ESAP Table 8

ESAP Homes Unwilling / Unable to Participate ¹

County	Reason Provided						
	Customer Unwilling/Decided Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
SAN DIEGO	11,920	24,046	17	-	1,765	1,262	5,610
ORANGE	7	4,059	8	-	-	-	101
Total	11,927	28,105	25	-	1,765	1,262	5,711

¹ Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging, and Building Electrification. MFWB implementation to occur no earlier than January 2023.

ESAP Coordinated Treatment (SCE and SCG only)

# of Households Received Measures from one Utility, but not other Utility or Partnering Agency	Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency ¹			
	# of Customer Unwilling/Decided Program Measures	# of Customer Unavailable - Scheduling Conflicts	# of Hazardous Environment (unsafe/unclean)	# of Landlord Refused to Authorize Participation
				# of Other Infeasible/ Ineligible
Total	-	-	-	-

¹ Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging, and Building Electrification.

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
 ESAP Table 9
 Life Cycle Bill Savings by Measure - ESA Main Program (SF, MH, MF In-Unit)

Measure Name	Unit	2022 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings
Appliances						
High Efficiency Clothes Washer	Each	152	1.39	13.34	11	38,294
Refrigerator	Each	697	532.74	-	14	1,299,610
Microwave	Each	-	-	-	-	-
New - Freezer	Each	-	-	-	-	-
Domestic Hot Water						
Other Domestic Hot Water	Home	3,737	4.21	4.00	10	291,767
Water Heater Tank and Pipe Insulation	Home	576	11.68	(2.04)	4	(1,115)
Water Heater Repair/Replacement	Each	771	-	2.06	11	29,540
Combined Showerhead/TSV	Each	45	5.42	4.98	10	4,396
New - Heat Pump Water Heater	Each	-	-	-	-	-
New - Tub Diverter/ Tub Spout	Each	1	-	9.18	10	155
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	-
Enclosure						
Air Sealing / Envelope	Home	4,255	(6.57)	(2.51)	3	(75,158)
Caulking	Home	-	-	-	-	-
Attic Insulation	Home	99	52.12	30.59	7	42,929
HVAC						
FAU Standing Pilot Conversion	Each	-	-	-	-	-
Furnace Repair/Replacement	Each	1,233	-	(5.59)	20	(233,017)
Room A/C Replacement	Each	188	(312.72)	-	9	(132,280)
Central A/C replacement	Each	-	-	-	-	-
Heat Pump Replacement	Each	-	-	-	-	-
Evaporative Cooler (Replacement)	Each	-	-	-	-	-
Evaporative Cooler (Installation)	Each	-	-	-	-	-
Duct Test and Seal	Home	141	8.62	4.09	3	3,832
New - Energy Efficient Fan Control	Home	-	-	-	-	-
New - Prescriptive Duct Sealing	Home	-	-	-	-	-
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	-
New - A/C Time Delay	Home	-	-	-	-	-
New - Smart Thermostat	Home	143	41.19	2.76	9	19,475
Maintenance						
Furnace Clean and Tune	Home	-	-	-	-	-
Central A/C Tune-up	Home	-	-	-	-	-
Lighting						
Interior Hard wired LED fixtures	Each	1,033	36.25	(0.43)	8	70,150
Exterior Hard wired LED fixtures	Each	329	5.14	-	16	6,764
LED Torchiere	Each	1	2.12	(0.04)	16	7
Occupancy Sensor	Each	-	-	-	-	-
LED Night Light	Each	-	-	-	-	-
New - LED R/BR Lamps	Each	6,460	3.02	(0.05)	16	69,944
New - LED A-Lamps	Each	77,800	2.12	(0.04)	16	582,389
Miscellaneous						
Pool Pumps	Each	2	1,037.00	-	10	5,185
Smart Strip	Each	1,184	81.01	-	2	40,043
Smart Strip Tier II	Each	3,364	189.87	(0.00)	2	266,669
Pilots						
Total						\$ 2,329,568
Total Homes Served By the Program	12,662					
Life Cycle Bill Savings Per Home	\$ 184					

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit).

For ESA Main, energy savings are sourced from 1) the PY2015 to PY2017 ESA Impact Evaluation and 2) energy efficiency workpapers.

Per measure kWh and therm impacts are presented as total kWh savings divided by total units and total therm savings divided by total units.

Average rates for kWh and therms paid by ESA participants in 2022 was used to calculate lifecycle bill savings.

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 9 A
Life Cycle Bill Savings by Measure - ESA MF CAM

Measure Name	Unit	2022 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings
Appliances						
Domestic Hot Water						
Central Boiler ²	Cap-kBTU/h	606	-	4	15	104,762
Faucet Aerator	Each					
Pipe Insulation	Home					
Envelope						
HVAC						
AC Tune-up ¹	Cap-Tons					
Furnace Replacement ²	Cap-kBTU/h					
HEAT Pump Split System ²	Cap-Tons					
HEAT Pump Split System	Each	8	36	-	15	1,231
Programmable Thermostat	Each	2	1	-	9	5
Lighting						
Exterior LED Lighting	Fixture	809	132	-	5.9	181,417
Exterior LED Lighting - Pool	Lamp					
Interior LED Exit Sign	Fixture	34	10	(0)	5	460
Interior LED Fixture	Fixture	1,257	179	(0)	8	511,929
Interior LED Lighting	KiloLumen	281	11	(0)	12	10,360
Interior LED Screw-in	Lamp	92	42	(0)	5	5,436
Interior TLED Type A Lamps	Lamp	4	7	(0)	5	34
Interior TLED Type C Lamps	Lamp	618	18	(0)	8	24,018
Miscellaneous						
Tier-2 Smart Power Strip	Each					
Variable Speed Pool Pump	Each	1	8,100	-	10	23,376
Total						\$ 863,028
Total Properties Served By the Program	29					
Life Cycle Bill Savings Per Property	\$ 29,760					

¹ Savings estimates are sourced from approved workpapers.

² This represents the unit of measure such as KiloLumen, Cap Tons and Cap kBTU/h. It is not a count of each measure installed or each home the measure was installed in.

Per measure kWh and therm impacts are presented as total kWh savings divided by total units and total therm savings divided by total units.

Average rates for kWh and therms paid by participants in 2022 was used to calculate lifecycle bill savings.

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
 ESAP Table 9 B
 Life Cycle Bill Savings by Measure - ESA Pilot Plus and Pilot Deep

Measure Name	Unit	2022 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings
Appliances						
High Efficiency Clothes Washer	Each					
Refrigerator	Each					
Microwave	Each					
New - Freezer	Each					
Domestic Hot Water						
Other Domestic Hot Water	Home					
Water Heater Tank and Pipe Insulation	Home					
Water Heater Repair/Replacement	Each					
Combined Showerhead/TSV	Each					
New - Heat Pump Water Heater	Each					
New - Tub Diverter/ Tub Spout	Each					
New - Thermostat-controlled Shower Valve	Each					
Enclosure						
Air Sealing / Envelope	Home					
Caulking	Home					
Attic Insulation	Home					
HVAC						
FAU Standing Pilot Conversion	Each					
Furnace Repair/Replacement	Each					
Room A/C Replacement	Each					
Central A/C replacement	Each					
Heat Pump Replacement	Each					
Evaporative Cooler (Replacement)	Each					
Evaporative Cooler (Installation)	Each					
Duct Test and Seal	Home					
New - Energy Efficient Fan Control	Home					
New - Prescriptive Duct Sealing	Home					
New - High Efficiency Forced Air Unit (HE FAU)	Home					
New - A/C Time Delay	Home					
New - Smart Thermostat	Home					
Maintenance						
Furnace Clean and Tune	Home					
Central A/C Tune-up	Home					
Lighting						
Interior Hard wired LED fixtures	Each					
Exterior Hard wired LED fixtures	Each					
LED Torchiere	Each					
Occupancy Sensor	Each					
LED Night Light	Each					
New - LED R/BR Lamps	Each					
New - LED A-Lamps	Each					
Miscellaneous						
Pool Pumps	Each					
Smart Strip	Each					
Smart Strip Tier II	Each					
Pilots						
Total						\$ -
Total Homes Served By the Program						
Life Cycle Bill Savings Per Home	#DIV/0!					

Savings estimates are sourced from the PY 2015 to 2017 ESA Impact Evaluation; Energy Division instructed the IOUs to use these results for 2019 and 2020 savings estimates.

Per measure kWh and therm impacts are presented as total kWh savings divided by total participants and total therm savings divided by total participants. Average rates for kWh and therms paid by ESA participants in 2020 was used to calculate lifecycle bill savings.

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
 ESAP Table 9 C
 Life Cycle Bill Savings by Measure - Building Electrification (SCE Only)

Measure Name	Unit	2022 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings
Appliances						
High Efficiency Clothes Washer	Each					
Refrigerator	Each					
Microwave	Each					
New - Freezer	Each					
Domestic Hot Water						
Other Domestic Hot Water	Home					
Water Heater Tank and Pipe Insulation	Home					
Water Heater Repair/Replacement	Each					
Combined Showerhead/TSV	Each					
New - Heat Pump Water Heater	Each					
New - Tub Diverter/ Tub Spout	Each					
New - Thermostat-controlled Shower Valve	Each					
Enclosure						
Air Sealing / Envelope	Home					
Caulking	Home					
Attic Insulation	Home					
HVAC						
FAU Standing Pilot Conversion	Each					
Furnace Repair/Replacement	Each					
Room A/C Replacement	Each					
Central A/C replacement	Each					
Heat Pump Replacement	Each					
Evaporative Cooler (Replacement)	Each					
Evaporative Cooler (Installation)	Each					
Duct Test and Seal	Home					
New - Energy Efficient Fan Control	Home					
New - Prescriptive Duct Sealing	Home					
New - High Efficiency Forced Air Unit (HE FAU)	Home					
New - A/C Time Delay	Home					
New - Smart Thermostat	Home					
Maintenance						
Furnace Clean and Tune	Home					
Central A/C Tune-up	Home					
Lighting						
Interior Hard wired LED fixtures	Each					
Exterior Hard wired LED fixtures	Each					
LED Torchiere	Each					
Occupancy Sensor	Each					
LED Night Light	Each					
New - LED R/BR Lamps	Each					
New - LED A-Lamps	Each					
Miscellaneous						
Pool Pumps	Each					
Smart Strip	Each					
Smart Strip Tier II	Each					
Pilots						
Total						\$ -
Total Homes Served By the Program						
Life Cycle Bill Savings Per Home	#DIV/0!					

Savings estimates are sourced from the PY 2015 to 2017 ESA Impact Evaluation; Energy Division instructed the IOUs to use these results for 2019 and 2020 savings estimates.

Per measure kWh and therm impacts are presented as total kWh savings divided by total participants and total therm savings divided by total participants. Average rates for kWh and therms paid by ESA participants in 2020 was used to calculate lifecycle bill savings.

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 10 ¹

Residential Energy Rate Used for Bill Savings Calculations ²			Non-Residential Energy Rate Used for Bill Savings Calculations (MF In-Unit, MF CAM, MFWB) ³		
Year	\$/kWh	\$/Therm	Year	\$/kWh	\$/Therm
2022	0.25	1.69	2022	0.29	3.15
2023	0.26	1.74	2023	0.30	3.24
2024	0.27	1.80	2024	0.31	3.34
2025	0.28	1.85	2025	0.32	3.44
2026	0.29	1.90	2026	0.32	3.54
2027	0.29	1.96	2027	0.33	3.65
2028	0.30	2.02	2028	0.34	3.76
2029	0.31	2.08	2029	0.35	3.87
2030	0.32	2.14	2030	0.37	3.99
2031	0.33	2.21	2031	0.38	4.11
2032	0.34	2.27	2032	0.39	4.23
2033	0.35	2.34	2033	0.40	4.36
2034	0.36	2.41	2034	0.41	4.49
2035	0.37	2.48	2035	0.42	4.62
2036	0.38	2.56	2036	0.44	4.76
2037	0.39	2.64	2037	0.45	4.91
2038	0.41	2.72	2038	0.46	5.05
2039	0.42	2.80	2039	0.48	5.20
2040	0.43	2.88	2040	0.49	5.36
2041	0.44	2.97	2041	0.51	5.52
2042	0.46	3.06	2042	0.52	5.69
2043	0.47	3.15	2043	0.54	5.86
2044	0.49	3.24	2044	0.55	6.03
2045	0.50	3.34	2045	0.57	6.21
2046	0.51	3.44	2046	0.59	6.40
2047	0.53	3.54	2047	0.60	6.59
2048	0.55	3.65	2048	0.62	6.79

¹ For 2022, the average cost per kWh and therm paid by ESA participants is shown. Cost is escalated 3% annually for remaining years. These values do not include adjustments for TOU rates. Only the 2022 value is used to calculate lifecycle bill savings for this report.

² Summary includes ESA Main Program (SF, MH, MF-In-Unit) Pilot Plus and Pilot Deep, CSD Leveraging, and Building Electrification. Clean Energy Homes is not applicable.

³ Summary data includes ESA MF CAM and MFWB. MF In-Unit is shown in residential rates.

**San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
Bill Savings Calculations**

ESAP Table 11				
Bill Savings Calculations by Program Year (ESA Main - SF, MH, MF-In-Unit)				
Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022	\$ 14,369,754	\$ 2,329,568	0.16	\$ 184

ESAP Table 11 A				
Bill Savings Calculations by Program Year (Pilot Plus and Pilot Deep)				
Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022				

Note: Data for program years prior to 2022 is not applicable as program not authorized until D.21-06-015.

ESAP Table 11 B				
Bill Savings Calculations by Program Year - MF CAM and MFWB ¹				
Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022	\$ 1,453,499	\$ 863,028	0.59	\$ 29,760

ESAP Table 11 C				
Bill Savings Calculations by Program Year - Building Electrification				
Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022				

Note: Data for program years prior to 2022 is not applicable as program not authorized until D.21-06-015.

¹ Summary data includes ESA MF CAM and MFWB. MF In-Unit is shown in ESA Main. MFWB implementation to occur no earlier than January 2023, therefore this data only reflects MF CAM.
Note: Clean Energy Homes is not applicable.

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
 ESAP Table 13

Categorical and Other Enrollment

ESA Main (SF, MH, MF In-Unit) ¹	
Type of Enrollment	Number of Homes Treated
Women, Infants, and Children Program (WIC)	827
Supplemental Security Income (SSI)	611
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	1,235
CalWORKs/Temporary Assistance for Needy Families (TANF)	97
Tribal TANF	-
Medicaid/Medi-Cal for Families	1,016
Healthy Families A&B	108
National School Lunch Program (NSLP) - Free Lunch	5
Low-income Home Energy Assistance Program (LIHEAP)	424
Bureau of Indian Affairs General Assistance	1
Head Start Income Eligible - (Tribal Only)	-
CARE Income Certified	634
80/20 Rule ²	-
Targeted Self Certification	5,743
Standard Enrollment	1,961
Total	12,662

ESA MF CAM	
Type of Enrollment	Number of Homes Treated
Women, Infants, and Children Program (WIC)	
Supplemental Security Income (SSI)	
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	
CalWORKs/Temporary Assistance for Needy Families (TANF)	
Tribal TANF	
Medicaid/Medi-Cal for Families	
Healthy Families A&B	
National School Lunch Program (NSLP) - Free Lunch	
Low-income Home Energy Assistance Program (LIHEAP)	
Bureau of Indian Affairs General Assistance	
Head Start Income Eligible - (Tribal Only)	
CARE Income Certified	
80/20 Rule	
Targeted Self Certification	
Standard Enrollment	
Total	-

ESA Pilot Plus and Pilot Deep	
Type of Enrollment	Number of Homes Treated
Women, Infants, and Children Program (WIC)	
Supplemental Security Income (SSI)	
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	
CalWORKs/Temporary Assistance for Needy Families (TANF)	
Tribal TANF	
Medicaid/Medi-Cal for Families	
Healthy Families A&B	
National School Lunch Program (NSLP) - Free Lunch	
Low-income Home Energy Assistance Program (LIHEAP)	
Bureau of Indian Affairs General Assistance	
Head Start Income Eligible - (Tribal Only)	
CARE Income Certified	
80/20 Rule	
Targeted Self Certification	
Standard Enrollment	
Total	-

ESA Building Electrification (SCE Only)	
Type of Enrollment	Number of Homes Treated
Women, Infants, and Children Program (WIC)	
Supplemental Security Income (SSI)	
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	
CalWORKs/Temporary Assistance for Needy Families (TANF)	
Tribal TANF	
Medicaid/Medi-Cal for Families	
Healthy Families A&B	
National School Lunch Program (NSLP) - Free Lunch	
Low-income Home Energy Assistance Program (LIHEAP)	
Bureau of Indian Affairs General Assistance	
Head Start Income Eligible - (Tribal Only)	
CARE Income Certified	
80/20 Rule	
Targeted Self Certification	
Standard Enrollment	
Total	-

¹ Summary data which includes ESA Main Program (SF, MH, MF-In-Unit).

² Pursuant to D.01-03-028 OP 3(a) which is applicable to master-metered as well as individual metered homes which allows treatment of property when 80% of tenants are income qualified for ESA Program.

Note: Categorical enrollment is not applicable to MFWB or Clean Energy Homes.

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report

ESAP Table 14

Leveraging & Integration^{1,6}

ESA Main (SF, MH, MF In-Unit) ¹										
Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Savings ³	Other Measurable Benefits ³	Enrollments Resulting from Leveraging Effort ⁴	Methodology ⁵	Meets all Criteria	If not, Explain
LIHEAP	SDG&E's partners with local CSD agencies to enroll eligible LIHEAP bill assistance customers in the ESA Program. ESA expanded efforts which allowed LIHEAP agencies to perform outreach and assessment services.	Yes	No	N/A	kWh: 233,825 kW: 5 Therms: 33	Unknown	759	Sum of savings per treated homes identified as having LIHEAP agency as the source of the enrollment.	No	We are unable to accurately track dollars saved from this effort.
DAC-SASH	Leveraging partnership with GRID where SDG&E received list of potential ESA Leads. Lead generated ESA Program enrollments.	Yes	Yes	N/A	kWh: 212 kW: 0 Therms: (0)	Unknown	2	Sum of savings per treated homes identified as having Grid Alternatives (SASH) as the source of the enrollment.	No	We are unable to accurately track dollars saved from this effort.
SDCWA	Partnership to leverage installation of customers receiving water saving measures in SDCWA service territory. SDCWA provides rebates to SDG&E for measures.	Yes	Yes	\$ 85,714	NA	Unknown	NA	Total rebate amount received from SDCWA in 2022.	No	We are unable to track the savings from this effort.
CARE/Medical Baseline	Marketing to customers enrolled in CARE and/or Medical Baseline	No	No	N/A	kWh: 9,354 kW: 1 Therms: 21	Unknown	107	Sum of savings per treated homes identified as having CARE or Medical Baseline as lead source.	No	We are unable to accurately track dollars saved from this effort.
CARE High Usage	Automated Lead Generation for CARE High Usage Verification Process	No	No	N/A	kWh: 69,033 kW: 7 Therms: (407)	Unknown	654	Sum of savings per treated homes identified as having CARE High Usage as lead source	No	We are unable to accurately track dollars saved from this effort.
MF CAM and MFWB										
Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Savings ³	Other Measurable Benefits ³	Enrollments Resulting from Leveraging Effort ⁴	Methodology ⁵	Meets all Criteria	If not, Explain
SOMAH	Leveraging partnership with CSE where SDG&E received list of potential ESA Leads. Lead generated for ESA Main & ESA CAM Program enrollments.	Yes	No	N/A	N/A	N/A	0	N/A	N/A	N/A
ESA Pilot Plus and Pilot Deep										
Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Savings ³	Other Measurable Benefits ³	Enrollments Resulting from Leveraging Effort ⁴	Methodology ⁵	Meets all Criteria	If not, Explain
ESA Building Electrification (SCE Only)										
Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Savings ³	Other Measurable Benefits ³	Enrollments Resulting from Leveraging Effort ^{4,6}	Methodology ⁵	Meets all Criteria	If not, Explain
ESA Clean Energy Homes (SCE Only)										
Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Savings ³	Other Measurable Benefits ³	Enrollments Resulting from Leveraging Effort ⁴	Methodology ⁵	Meets all Criteria	If not, Explain

Note: Summary data includes ESA Main Program (SF, MH, MF-In-Unit), Pilot Plus and Pilot Deep, MF CAM, Building Electrification, and Clean Energy Homes. MFWB implementation to occur no earlier than January 2023.

¹ Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.

² Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).

³ Annual Energy savings/benefits for measures installation in 2022. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.

⁴ Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

⁵ In footnotes, provide information on methodology used to calculate cost and/or resource savings.

⁶ Leveraging Effort includes Leads from prior program years that were enrolled in 2022.

Fields not applicable to specific efforts are marked "N/A".

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 14A

Clean Energy Referral, Leveraging, and Coordination

Partner	Brief Description of Effort	# of Referral	# of Leveraging	# of Coordination Efforts	# of Leads 1	# of Enrollments from Successful Leads 2
LIHEAP	SDG&E's partners with local CSD agencies to enroll eligible LIHEAP bill assistance customers in the ESA Program. ESA expanded efforts which allowed LIHEAP agencies to perform outreach and assessment services.	Unknown	N/A	N/A	2,098	741
DAC-SASH	Leveraging partnership with GRID where SDG&E received list of potential ESA Leads. Lead generated ESA Program enrollments.	47	N/A	3	47	2
SDCWA	Partnership to leverage installation of customers receiving water saving measures in SDCWA service territory. SDCWA provides rebates to SDG&E for measures.	0	1	1	-	0
CARE/Medical Baseline	Marketing to customers enrolled in CARE and/or Medical Baseline	N/A	N/A	N/A	8,156	105
CARE High Usage	Automated Lead Generation for CARE High Usage Verification Process	N/A	N/A	N/A	655	336

Note to IOUs:

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

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

¹ Leads created in program year 2022.

² Includes leads created and enrolled in program year 2022.

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report

ESAP Table 15

Expenditures for Pilots and Studies

	Authorized 2022 Funding			2022 Expenses			% of Budget Expensed		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots									
Virtual Energy Coach (PG&E only)		\$ -	\$ -			\$ -	0%	0%	0%
Total Pilots	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Studies									
Low Income Needs Assessment Study ¹			\$ 37,500	\$ 13,414	\$ 13,414	\$ 26,828			72%
Statewide Categorical Eligibility Study ^{2,3}			\$ 11,250	\$ 7,936	\$ 7,936	\$ 15,871			141%
Load Impact Evaluation Study ²			\$ 225,000	\$ -	\$ -	\$ -			0%
Equity Criteria and Non Energy Benefits Evaluation (NEB's) ²			\$ 75,000	\$ -	\$ -	\$ -			0%
Process Evaluations ²			\$ 75,000			\$ -			0%
Evolving Study and Data Needs ²			\$ 300,000	\$ 37,919	\$ 37,919	\$ 75,838			25%
Total Studies	\$ -	\$ -	\$ 723,750	\$ 59,269	\$ 59,269	\$ 118,537			16%

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

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

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

San Diego Gas & Electric PY 2022 Energy Savings Assistance Program Annual Report
 ESAP Table 16
 ESAP Tribal Outreach¹

OUTREACH STATUS	Quantity (Includes CARE, FERA, and ESA)	List of Participating Tribes
Tribes completed ESA Meet & Confer*	13	Barona Band of Mission Indians, Jamul Indian Village of California of the Kumeeyaay Indians, Pauma Band of Luiseno Indians, Rincon Band of Luiseno Indians, Ewiaapaayap Band of Kumeeyaay Indians, Sycuan Band of Kumeeyaay Nation, Viejas Band of the Kumeeyaay Nation, La Posta Band of Diegueno Mission Indians, Mesa Grande Band of Diegueno Mission Indians, Manzanita Band of Kumeeyaay Nation, Campo Kumeeyaay Nation, Iiapay Nation of Santa Ysabel, La Jolla Band of Luiseno Indians
Tribes requested outreach materials or applications	5	Pauma Band of Luiseno Indians, La Posta Band of Diegueno Mission Indians, Mesa Grande Band of Diegueno Mission Indians, Iipay Nation Santa Ysabel, Jamul Indian Village of California of the Kumeeyaay Nation
Tribes who have not accepted offer to Meet and Confer	4	San Pasqual Band of Mission Indians, Inaja-Cosmit Band of Indians**, Pala Band of Luiseno Indians, Los Coyotes Band of Cahuilla and Cupeno Indian
Tribes and Housing Authority sites involved in Focused Project/ESA	N/A	N/A
Partnership offer on Tribal Lands	N/A	N/A
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	2	Southern California American Indian Resource Center (SCAIR); Southern California Tribal Chairmen's Association (SCTCA)**
Housing Authority and TANF offices who participated in Meet and Confer	N/A	N/A

¹ Summary data which includes ESA Main Program (SF, MH, MF-In-Umit), Pilot Plus and Pilot Deep, MF CAM, CSD Leveraging, Building Electrification, and Clean Energy Homes.

*SDG&E has invited all 17 tribes to meet and confer and will continue to engage throughout 2022.

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

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

San Diego Gas & Electric PY 2022 CARE Annual Report

CARE Table 1

Category	Overall Expenditures		Total	Authorized Budget ¹	% of Budget Spent	Total Shifted ²	Shifted to/from?
	Electric	Gas					
Outreach	\$ 2,227,320	\$ 264,897	\$ 2,492,218	\$ 2,492,218	100%	\$ (745,175)	Shifted to Processing, Certification, Recertification
Processing, Certification, Recertification	\$ 1,312,679	\$ 157,460	\$ 1,470,139	\$ 1,470,139	100%	\$ 882,546	Shifted from Outreach; IT Programming
Post Enrollment Verification	\$ 68,550	\$ 8,236	\$ 76,786	\$ 456,452	17%		
IT Programming	\$ 529,841	\$ 61,727	\$ 591,569	\$ 933,662	63%	\$ (146,338)	Shifted to Processing, Certification, Recertification; CHANGES Program
Pilots	\$ -	\$ -	\$ -	\$ -	0%		
CHANGES Program	\$ 244,114	\$ 29,852	\$ 273,967	\$ 273,967	100%	\$ 8,967	Shifted from IT Programming
Measurement & Evaluation	\$ 74,070	\$ 8,727	\$ 82,798	\$ 107,719	77%		
Regulatory Compliance	\$ 154,725	\$ 18,716	\$ 173,441	\$ 309,000	56%		
General Administration	\$ 395,855	\$ 47,777	\$ 443,631	\$ 630,000	70%		
CPUC Energy Division	\$ 36,159	\$ 4,318	\$ 40,478	\$ 67,888	60%		
TOTAL Program Costs	\$ 5,043,315	\$ 601,711	\$ 5,645,026	\$ 6,741,045	84%	\$ -	
CARE Rate Discount ³	\$ 205,993,118	\$ 22,624,235	\$ 228,617,353	\$ 165,211,754	138%	\$ -	
Service Establishment Charge Discount	\$ -	\$ -	\$ -	\$ -	0%	\$ -	
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 211,036,433	\$ 23,225,946	\$ 234,262,379	\$ 171,952,799	136%	\$ -	

¹ Total authorized budget approved in D.21-06-015, Attachment 1, Table 2 and adjusted for program year 2022 fund shifts as noted in footnote 2.

² Reflects fund shift in accordance with the rules set forth in D. 08-11-031 as modified by D. 10-10-008; D. 10-16-11-022, D. 17-12-009 and D.21-06-015, which granted the IOUs authority to shift funds between the CARE program categories.

³ CARE Rate Discount budget amount reflected in Advice Letters 3928-E & 3849-E and 3027-G-A, effective January 1, 2022.

San Diego Gas & Electric PY 2022 CARE Annual Report

CARE Table 2

Enrollment, Recertification, Attrition, & Penetration

	Automatic Enrollment				New Enrollment				Enrollment, Recertification, Attrition, & Penetration										Enrollment Net Adjusted (K-F)	Total CARE Participants	Estimated CARE Eligible	Enrollment Rate % (W/X)					
	Inter-Utility ¹	Intra-Utility ²	Levraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (E+G+H+I)	Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automate Recertification (L-M+N)	Total Recertification (L-M+N)	No Response ⁴	Failed PEV	Failed Recertification	Other					Total Attrition (P+Q+R+S)	Gross (K+O)	SF	MF	MH
January	0	78	0	78	5,682	1,371	414	185	7,652	7,730	2,337	4,052	397	6,786	3,669	1	-3	-2,443	1,224	14,516	184,534	93,438	9,115	324,010	289,316	112%	
February	0	105	0	105	6,061	597	650	190	7,498	7,603	2,379	3,928	121	6,428	3,546	0	-2	3,056	6,600	14,031	185,186	93,443	9,165	325,013	289,316	112%	
March	0	94	0	94	5,930	562	570	162	7,224	7,318	1,236	3,554	4	4,294	4,572	1	-1	2,776	7,348	12,112	185,183	93,148	9,146	324,983	289,316	112%	
April	0	86	0	86	3,996	457	226	165	4,844	4,930	1,09	3,070	5	3,244	418	0	0	-12,943	-12,525	8,174	17,455	195,799	97,918	9,344	342,438	289,316	118%
May	0	109	0	109	4,510	567	311	117	5,505	5,614	53	3,483	5	3,541	291	0	4	3,666	3,961	9,155	196,638	98,362	9,368	344,091	289,316	119%	
June	1	82	0	83	4,548	456	296	138	5,438	5,521	55	3,074	7	3,136	256	0	1	2,731	2,988	8,657	197,979	98,897	9,368	346,624	289,316	120%	
July	0	87	0	87	4,875	294	215	103	5,487	5,574	1,533	3,596	17	5,166	377	1	10	3,719	4,107	10,740	198,998	99,024	9,432	348,091	289,316	120%	
August	0	65	0	65	4,836	257	319	69	5,481	5,546	286	3,317	4	3,587	258	0	29	2,251	2,538	9,133	200,646	99,751	9,422	351,099	289,316	121%	
September	15	66	0	81	5,253	347	302	143	6,045	6,126	695	3,501	7	4,203	402	45	45	7,838	8,309	10,329	199,555	98,755	9,589	348,916	289,316	121%	
October	215	82	0	297	4,174	420	229	98	4,921	5,218	1,424	3,700	0	5,124	2,184	5	43	-1,514	718	10,342	4,300	202,532	99,687	9,399	353,416	289,316	122%
November	0	62	0	62	4,358	301	280	118	5,057	5,119	4,483	2,852	5	7,340	2,187	9	94	1,238	3,528	12,459	1,391	203,038	99,962	9,383	355,007	289,316	123%
December	42	53	0	95	4,459	268	343	97	5,167	5,262	1,355	4,498	2	6,055	4,487	7	73	102	4,669	11,317	203,165	100,078	9,383	355,600	289,316	123%	
YTD Total	273	969	0	1,242	58,682	5,897	4,155	1,585	70,319	71,561	16,205	42,625	574	59,404	22,647	30	291	10,497	33,465	130,965	283,165	100,078	9,383	355,600	289,316	123%	

¹ Enrollments via data sharing between the IOUs.

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

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

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

⁵ Data provided for CARE Participants by Dwelling Type does not fully represent total number of customers by dwelling type as SDG&E is unable to extrapolate from its Customer Information System (CIS). SDG&E will continue to refine data for future reports.

San Diego Gas & Electric PY 2022 CARE Annual Report

CARE Table 3A - Post-Enrollment Verification Results (Model) 2022

Month	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
January	324,010	7	0.00%	2	0	2	29%	0.00%
February	325,013	12	0.00%	4	0	4	33%	0.00%
March	324,983	5	0.00%	4	0	4	80%	0.00%
April	342,438	4	0.00%	3	0	3	75%	0.00%
May	344,091	2	0.00%	1	0	1	50%	0.00%
June	346,624	804	0.23%	537	11	548	68%	0.16%
July	348,091	2,122	0.61%	1,426	24	1,450	68%	0.42%
August	351,099	2,680	0.76%	1,761	27	1,788	67%	0.51%
September	348,916	2,662	0.76%	1,724	45	1,769	66%	0.51%
October	353,416	2,424	0.69%	1,553	31	1,584	65%	0.45%
November	355,007	36	0.01%	16	0	16	44%	0.00%
December	355,600	30	0.01%	12	0	12	40%	0.00%
YTD Total	355,600	10,788	3.03%	7,043	138	7,181	67%	2.02%

¹ Includes all customers who failed SDG&E's CARE eligibility probability model.
² Includes customers verified as over income or who requested to be de-enrolled.
³ Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.
⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.

San Diego Gas & Electric PY 2022 CARE Annual Report

CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)

Month	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through HUV Post Enrollment Verification	% of Total CARE Households De-enrolled
January	324,010	1,960	0.60%	1,734	15	1,749	89%	0.54%
February	325,013	383	0.12%	272	5	277	72%	0.09%
March	324,983	381	0.12%	255	3	258	68%	0.08%
April	342,438	220	0.06%	157	4	161	73%	0.05%
May	344,091	398	0.12%	307	2	309	78%	0.09%
June	346,624	299	0.09%	222	1	223	75%	0.06%
July	348,091	13	0.00%	9	0	9	69%	0.00%
August	351,099	188	0.05%	142	0	142	76%	0.04%
September	348,916	1,652	0.47%	1,240	23	1,263	76%	0.36%
October	353,416	785	0.22%	609	10	619	79%	0.18%
November	355,007	170	0.05%	108	2	110	65%	0.03%
December	355,600	292	0.08%	99	3	102	35%	0.03%
YTD Total	355,600	6,741	1.90%	5,154	68	5,222	77%	1.47%

¹ Includes all participants who were selected for high usage verification process.
² Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.
³ Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600%+ users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.

San Diego Gas & Electric PY 2022 CARE Annual Report						
CARE Table 4						
CARE Self-Certification and Self-Recertification Applications ¹						
	Provided ²	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total (Y-T-D)	7,500	115,920	80,114	3,404	5,853	26,549
Percentage		100%	69%	3%	5%	23%

¹ Includes sub-metered customers.

² The Provided value is a combination of both CARE and FERA applications sent to customers

San Diego Gas & Electric PY 2022 CARE Annual Report										
CARE Table 5										
CARE Enrollment by County										
County	Estimated Eligible ²			Total Participants ³			Enrollment Rate ⁴			
	Urban	Rural ¹	Total	Urban	Rural	Total	Urban	Rural	Total	
	16,607	0	16,607	15,937	0	15,937	96%	0%	96%	
	266,215	6,494	272,709	331,909	7,754	339,663	125%	119%	125%	
Total	282,822	6,494	289,316	347,846	7,754	355,600	123%	119%	123%	

¹ Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.

² In accordance with Ordering Paragraph 189 of D.21-06-015, Annual CARE Eligibility Estimates filed February 12 of each year.

³ Total Households Enrolled includes submeter tenants.

⁴ Penetration Rate and Enrollment Rate are the same value.

San Diego Gas & Electric PY 2022 CARE Annual Report							
CARE Table 6							
CARE Recertification Results							
2022	Total CARE Households	Households Requested to Recertify ¹	% of Households Total (C/B)	Households Recertified ²	Households De-enrolled ³	Recertification Rate % ⁴ (E/C)	% of Total Households De-enrolled (F/B)
January	324,010	5,513	1.7%	4,605	361	84%	0.11%
February	325,013	2,664	0.8%	2,167	227	81%	0.07%
March	324,983	124	0.0%	12	82	10%	0.03%
April	342,438	152	0.0%	19	84	13%	0.02%
May	344,091	57	0.0%	10	37	18%	0.01%
June	346,624	163	0.0%	14	137	9%	0.04%
July	348,091	294	0.1%	70	174	24%	0.05%
August	351,099	1,921	0.5%	971	850	51%	0.24%
September	348,916	3,318	1.0%	1,778	1,348	54%	0.39%
October	353,416	4,184	1.2%	2,472	1,411	59%	0.40%
November	355,007	5,732	1.6%	2,564	207	45%	0.06%
December	355,600	6,238	1.8%	1,408	138	23%	0.04%
YTD	355,600	30,360	8.54%	16,090	5,056	53%	1.42%

¹ Excludes count of customers recertified through the probability model.

² Recertification results are tied to the month initiated and the recertification process allows customers 120 days (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.

³ Includes customers who did not respond or who requested to be de-enrolled.

⁴ Percentage of customers recertified compared to the total participants requested to recertify in that month.

San Diego Gas & Electric PY 2022 CARE Annual Report
CARE Table 7

CARE Capitation Contractors											
Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments ²			Total Expenditures			
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total				
211 SAN DIEGO		X			30	1,432	1,462	\$ 29,240			
ALPHA MINI MART	X				-	57	57	\$ 1,710			
AMERICAN RED CROSS WIC OFFICES		X	X		-	1	1	\$ 30			
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	3	3	\$ 90			
COMMUNITY RESOURCE CENTER		X			-	1	1	\$ 30			
ELDERHELP OF SAN DIEGO		X			-	-	-	-			
HEARTS AND HANDS WORKING TOGETHER		X			-	-	-	-			
HOME START		X			-	1	1	\$ 30			
HORN OF AFRICA		X			-	-	-	-			
INTERFAITH COMMUNITY SERVICES		X			-	-	-	-			
LA MAESTRA FAMILY CLINIC		X			1	37	38	\$ 1,140			
MAAC PROJECT		X		X	-	1	1	\$ 30			
NEIGHBORHOOD HEALTH CARE		X			-	5	5	\$ 150			
NORTH COUNTY HEALTH PROJECT, INC.	X				-	1	1	\$ 30			
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	-	-	-			
SAN YSIDRO HEALTH CENTERS		X			1	5	6	\$ 180			
SCRIPPS HEALTH WIC		X			-	3	3	\$ 90			
SOMALI BANTU ASSOCIATION OF AMERICA		X			-	-	-	-			
SOMALI FAMILY SERVICES		X			-	-	-	-			
UNION OF PAN ASIAN COMMUNITIES (UPAC)					-	-	-	-			
VISTA COMMUNITY CLINIC		X			-	6	6	\$ 180			
Total Enrollments and Expenditures					32	1,553	1,585	\$ 32,930			

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

² Enrollments reflect new enrollments only.

San Diego Gas & Electric PY 2022 CARE Annual Report

CARE Table 8

CARE Participants as of Month-End

2022	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Enrollment Rate	% Change
January	189,625	0	134,385	324,010	289,316	112%	2.05%
February	190,369	0	134,644	325,013	289,316	112%	0.31%
March	190,717	0	134,266	324,983	289,316	112%	-0.01%
April	201,823	0	140,615	342,438	289,316	118%	5.37%
May	202,881	0	141,210	344,091	289,316	119%	0.48%
June	204,456	0	142,168	346,624	289,316	120%	0.74%
July	205,537	0	142,554	348,091	289,316	120%	0.42%
August	207,356	0	143,743	351,099	289,316	121%	0.86%
September	206,326	0	142,590	348,916	289,316	121%	-0.62%
October	208,193	0	145,223	353,416	289,316	122%	1.29%
November	208,997	0	146,010	355,007	289,316	123%	0.45%
December	209,403	0	146,197	355,600	289,316	123%	0.17%

San Diego Gas & Electric PY 2022 CARE Annual Report
CARE Table 9
CARE Average Monthly Usage & Bill

Average Monthly Gas / Electric Usage			
Residential Non-CARE vs. CARE Customers			
Customer	Gas Therms	Gas Therms	Total
	Tier 1	Tier 2	
Non-CARE	16.9	6.5	23.4
CARE	15.6	3.0	18.6
Customer	Electric KWh	Electric KWh	Total
	Tier 1	Tier 2 and Above	
Non-CARE	270	117	387
CARE	273	83	356

Average Monthly Gas / Electric Bill ²		
Residential Non-CARE vs. CARE Customers ¹		
(Dollars per Customer)		
Customer	Gas	Electric
Non-CARE	\$51.47	\$150.63
CARE	\$30.50	\$83.47

¹ Excludes master-meter usage.

² Average Monthly Gas/Electric Bill reflects residential Non-CARE (CARE) 2022 total billed.

San Diego Gas & Electric PY 2022 CARE Annual Report

CARE Table 10

CARE Surcharge & Revenue

Electric

CARE Surcharge and Revenue Collected by Customer Class

Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
	CARE Surcharge ¹	Monthly Bill			
Residential	\$3.70	\$141	2.6%	\$65,737,067	36.30%
Commercial	\$15.37	\$458	3.4%	\$23,858,818	13.18%
Agricultural	\$79.97	\$1,594	5.0%	\$3,635,713	2.01%
Large/Indust	\$470.33	\$10,069	4.7%	\$87,851,364	48.51%

GAS

CARE Surcharge and Revenue Collected by Customer Class

Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
	CARE Surcharge ²	Monthly Bill			
Residential	\$1.52	\$60	2.5%	\$12,979,642	48.86%
Commercial	\$25.68	\$637	4.0%	\$7,652,884	28.81%
Natural Gas Vehicle	\$6,189.56	\$46,208	13.4%	\$613,259	2.31%
Industrial	\$6,915.23	\$17,275	40.0%	\$5,318,106	20.02%

¹ Excludes CARE customers. Pursuant to D. 15-07-001, OP 4 and Section 11.1.1 authorizes adjustments to CARE to transition to the legislatively-mandated CARE discount range in compliance with Section 739.1 were authorized. Effective 9/1/15 per AL 2783-E, CARE customers receive non-CARE rates; therefore, there is no longer a CARE Rate subsidy.

² Excludes CARE customers.

San Diego Gas & Electric PY 2022 CARE Annual Report

CARE Table 11

CARE Capitation Applications¹

Entity	Total Received	Approved ²	Denied	Pending/ Never Completed	Duplicate
211 SAN DIEGO	2,572	1,643	52	144	733
ALPHA MINI MART	565	64	0	5	496
ALLIANCE FOR AFRICAN ASSISTANCE	0	0	0	0	0
AMERICAN RED CROSS	12	7	0	5	0
CATHOLIC CHARITIES	0	0	0	0	0
CHILDREN'S INITIATIVE	0	0	0	0	0
CHULA VISTA COMMUNITY COLLABORATIVE	10	7	0	3	0
COMMUNITY HOUSING WORKS	0	0	0	0	0
COMMUNITY RESOURCE CENTER	4	2	0	2	0
CRISIS HOUSE	0	0	0	0	0
DEAF COMMUNITY SERVICES	0	0	0	0	0
FAMILY HEALTH CENTERS OF SAN DIEGO	0	0	0	0	0
HEARTS AND HANDS TOGETHER	2	1	0	1	0
HOME START	2	1	0	1	0
HORN OF AFRICA	0	0	0	0	0
INTERFAITH COMMUNITY	0	0	0	0	0
LA MAESTRA FAMILY CLINIC	74	53	2	19	0
MAAC PROJECT - CARE	8	3	0	5	0
NEIGHBORHOOD HEALTH CARE	16	11	0	5	0
NEIGHBORHOOD HEALTH INSURANCE CENTER	0	0	0	0	0
NORTH COUNTY HEALTH SERVICES	8	2	2	4	0
SAN DIEGO STATE UNIVERSITY WIC	8	3	1	4	0
SAN YSIDRO HEALTH CENTERS	19	8	1	10	0
SCRIPPS HEALTH WIC (SHW)	9	5	0	4	0
VISTA COMMUNITY CLINIC	7	7	0	0	0
Total	3,316	1,817	58	212	1,229

¹ Includes sub-metered customers.

² Includes new enrollments and recertification applications approved.

San Diego Gas & Electric PY 2022 CARE Annual Report

CARE Table 12

CARE Expansion Program

Participating Facilities by Month

2022	Gas			Electric		
	CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
January	224	110	334	541	188	729
February	216	110	326	533	185	718
March	218	111	329	558	186	744
April	218	111	329	656	187	843
May	217	111	328	563	187	750
June	217	111	328	566	186	752
July	217	111	328	563	187	750
August	217	111	328	561	186	747
September	206	111	317	561	186	747
October	407	112	519	562	187	749
November	207	111	318	561	186	747
December	207	111	318	562	186	748

Customer	Average Monthly Gas / Electric Usage ¹	
	Gas Therms	Electric KWh
Residential Facilities	32	382
Commercial Facilities	378	9,727

CARE Expansion Self-Certification and Self-Recertification Applications

	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	13	13	0	0	0
Percentage		100%	0%	0%	0%

¹ Excludes master meter usage.

San Diego Gas & Electric PY 2022 CARE Annual Report

CARE Table 13

CARE High Usage Verification Results⁵

Stage 1 - IRS Documentation and ESA Agreement		Stage 2 - ESA Participation			Stage 3 - Usage Monitoring				
Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) ¹	Income Verified and Referred to ESA	Failed and Removed ²	Ineligible ³	Completed	Removed ⁴	Appeals Denied	Appeals Approved
6,741	5,154	68	2,949	10	2,949	0	5	0	3

¹ Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.

² Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms.

³ Includes customers who previously participated in ESA Program, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.

⁴ Customers removed for exceeding 600% of baseline in any monthly billing cycle.

⁵ High usage is defined as a customer that exceeds 400% or 600% of baseline.

San Diego Gas & Electric PY 2022 CARE Annual Report
CARE Table 13A

CARE Customer Usage and ESA Program Treatment

# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV ¹	Percent of those CARE customers Not served by ESA Program ³	# of Enrollments led to ESA Program measure Installations ⁴	# of Long-Term tenancy CARE customers who have Not applied for ESA Program ²	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment ^{10]}			Energy Usage of CARE customers who do Not accept ESA Program treatment ⁹
				Energy Usage before ESA Program treatment ^{5,8}	Energy Usage within 3-months of ESA Program treatment ⁶	Energy Usage within 6-months of ESA Program treatment ⁷	
12,358	85%	88	10,518	1219 kWh	1318 kWh	N/A	645 kWh

¹ As of Nov 2022, there were 12,358 CARE accounts identified as customers who have been on CARE rate at the same meter for a least six years and have 90th Percentile of high usage.

² Those CARE customers who did not participate in the ESA Program as of Nov 2022:

³ Percentage of CARE customers not served by ESA: $\frac{2}{10518} \times 100 = 85\%$

⁴ Among the 10,518 accounts, 88 accounts enrolled as of March 2023.

⁵ Average monthly kWh in 12 months prior to ESA enrollment. Usage starting and ending month vary on accounts depending on ESA enrollment dates: 1219 kWh

⁶ Average monthly kWh 3 months after ESA enrollment: 1318

⁷ Average monthly kWh 6 months after ESA enrollment: N/A

⁸ Average monthly kWh 12 months after ESA enrollment: N/A

⁹ Among 10430 (10518 - 88) accounts, average monthly kWh is 645 kWh.

¹⁰ Not applicable for columns G and H as promotion campaign sent in Nov 2022.

San Diego Gas & Electric PY 2022 CARE Annual Report		
CARE Table 14		
Categorical Enrollment		
Type of Enrollment		Number of Customer Enrollments ¹
Bureau of Indian Affairs General Assistance		62
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps		17,797
CalWORKS/Temporary Assistance for Needy Families (TANF) ²		1,578
Head Start Income Eligible - (Tribal Only)		180
Healthy Families A&B		26
Low-income Home Energy Assistance Program (LIHEAP)		1,179
Medicaid/Medi-Cal		32,388
National School Lunch Program (NSLP) - Free Lunch		10,374
Supplemental Security Income (SSI)		5,656
Tribal TANF ²		-
Women, Infants, and Children Program (WIC)		4,862

¹ Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.

² CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.

San Diego Gas & Electric PY 2022 CARE Annual Report
CARE Table 15
CARE and Disadvantage Communities Enrollment Rate for Zip Codes

Total CARE Households Enrolled				
Month	CARE Enrollment Rate for Zip Codes that have 10% or more disconnections	CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG)	CARE Enrollment Rate for Zip Codes in High Poverty (with 70% or Less CARE Penetration)	CARE Enrollment Rate for DAC (Zip/Census Tract) Codes in High Poverty (with 70% or Less CARE Enrollment Rate)
January	N/A	113%	63%	N/A
February	N/A	114%	64%	N/A
March	N/A	113%	65%	N/A
April	N/A	120%	68%	N/A
May	N/A	120%	68%	N/A
June	N/A	121%	69%	N/A
July	N/A	122%	69%	N/A
August	N/A	123%	N/A	N/A
September	N/A	123%	N/A	N/A
October	N/A	124%	N/A	N/A
November	N/A	124%	N/A	N/A
December	N/A	124%	N/A	N/A
YTD		124%	69%	

Note:
Penetration Rate and Enrollment Rate are the same value.
DACs are defined at the census tract level. Corresponding zip codes are provided for the purpose of this table; however, the entire zip code listed may not be considered a DAC.
Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

San Diego Gas & Electric PY 2022 FERA Annual Report

FERA Table 1

Overall Program Expenses

Category	Overall Expenditures		Total	Authorized Budget ¹	% of Budget Spent	Total Shifted ²	Shifted to/from?
	Electric	Gas					
Outreach	\$ 182,036	\$ -	\$ 182,036	\$ 349,211	52%	\$ (11,869)	Shifted to Processing, Certification, Recertification; Regulatory
Processing, Certification, Recertification	\$ 17,294	\$ -	\$ 17,294	\$ 17,294	100%	\$ 4,420	Shifted from Outreach
Post Enrollment Verification	\$ 876	\$ -	\$ 876	\$ 923	95%		
IT Programming	\$ 22,110	\$ -	\$ 22,110	\$ 151,500	15%		
Pilot	\$ -	\$ -	\$ -	\$ -	0%		
Measurement & Evaluation	\$ -	\$ -	\$ -	\$ 50,000	0%		
Regulatory Compliance	\$ 52,109	\$ -	\$ 52,109	\$ 52,109	100%	\$ 7,449	Shifted from Outreach
General Administration	\$ 26,908	\$ -	\$ 26,908	\$ 71,930	37%		
CPLC Energy Division	\$ 8,095	\$ -	\$ 8,095	\$ 10,183	79%		
TOTAL Program Costs	\$ 309,428	\$ -	\$ 309,428	\$ 703,150	44%	\$0	
FERA Rate Discount ³	\$ 4,692,214	\$ -	\$ 4,692,214	\$ 3,711,343	126%	\$ -	
Service Establishment Charge Discount	\$ -	\$ -	\$ -	\$ -	0%	\$ -	
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 5,001,642	\$ -	\$ 5,001,642	\$ 4,414,493	113%	\$ -	

¹ Reflects total authorized funding approved in D.21-06-015, Attachment 1, Table 4 and adjusted for program year 2022 fund shifts as noted in footnote 2.

² Reflects fund shift in accordance with the rules set forth in D.21-06-015, which granted the IOUs authority to shift funds between the FERA program categories.

³ FERA Discount budget amount reflected in Advice Letters 3928-E and 3849-E, effective January 1, 2022.

FERA Table 2

Month	New Enrollment										Re-enrollment, Recertification, Attrition, & Penetration										Enrollment			Total F1 DA Participants	Estimated F1 DA Enrollments	Enrollment Quota % (WKA)
	Assurance Enrollment					Self-Certification (Income or Conspicuous)					Total New Enrollments (E-1)					Also Own (Type Oth)					Total Attractions (E-O-R-S)	Gross Additions (E-C)	Net Additions (E-C)			
	Inter-Utility	Utility	Leveraging	Continued (E-C-D)	Discontinue	Upgrade	Phase	Capacitation	Continued (E-C-H-I)	Total New Enrollments (E-1)	Screenouts	Non-Subscribers (Discontinue)	Assurance	Total Discontinues (E-M-A)	No. Discontinues ⁴	Frame PEV	Frame Hour (kWh)	Other	SI	MI						
January	0	0	0	0	177	38	13	5	278	279	6	38	0	45	258	0	-353	88	7,824	2,050	83	11,807	41,700	27%		
February	0	0	0	0	245	15	28	5	293	243	3	47	0	51	243	0	-288	26	7,774	4,050	37	11,821	41,700	27%		
March	0	0	0	0	154	18	8	3	183	187	6	35	0	39	187	0	-403	420	8,378	4,220	81	12,548	41,700	28%		
April	0	0	0	0	128	20	7	0	177	177	0	86	0	86	177	0	-307	303	7,931	4,160	67	12,117	41,700	28%		
May	0	0	0	0	11	10	6	1	168	168	0	25	0	25	163	0	-204	206	8,228	4,153	82	12,319	41,700	28%		
June	0	0	0	0	114	6	4	1	125	130	4	36	0	30	125	0	-225	240	8,177	4,113	80	12,290	41,700	28%		
July	0	0	0	0	106	6	17	0	127	124	2	37	0	34	124	0	-190	183	8,159	4,125	81	12,186	41,700	28%		
August	0	0	0	0	207	4	12	0	223	229	1	74	0	74	217	0	-287	310	8,326	4,096	83	12,314	41,700	28%		
September	0	0	0	0	163	4	16	1	175	180	1	76	0	77	171	0	-31	274	8,138	4,141	83	12,289	41,700	28%		
October	0	0	0	0	101	6	10	3	121	121	1	105	0	104	121	0	-140	224	8,138	4,141	83	12,289	41,700	28%		
November	0	0	0	0	101	6	10	3	121	121	1	105	0	104	121	0	-140	224	8,138	4,141	83	12,289	41,700	28%		
December	0	0	0	0	101	6	10	3	121	121	1	105	0	104	121	0	-140	224	8,138	4,141	83	12,289	41,700	28%		
F1 DA Total	0	0	0	0	2,068	152	156	28	2,338	2,271	142	677	0	818	673	1	172	1,626	8,183	4,124	82	12,248	43,300	28%		

¹ If enrollment via data sharing between two CEs.

² Enrollments via data sharing between separate programs within the utility.

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

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

⁵ Data provided for F1 DA Participants by (Billing Type does not fully represent total number of customers by Billing Type as SCECAL is unable to interpolate from its Customer Information System (CIS). SCECAL will continue to refine data for future reports.

San Diego Gas & Electric PY 2022 FERA Annual Report

FERA Table 3A - Post-Enrollment Verification Results (Model) 2022

Month	Total FERA Households Enrolled	Households Requested to Verify ¹	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification ⁴	% of Total FERA Households De-enrolled
January	11,800	0	0.00%	0	0	0	0%	0.00%
February	11,683	1	0.01%	0	0	0	0%	0.00%
March	11,672	0	0.00%	0	0	0	0%	0.00%
April	12,548	0	0.00%	0	0	0	0%	0.00%
May	12,417	0	0.00%	0	0	0	0%	0.00%
June	12,319	45	0.37%	0	1	1	2%	0.01%
July	12,209	64	0.52%	0	1	1	2%	0.01%
August	12,195	77	0.63%	0	2	2	3%	0.02%
September	12,114	70	0.58%	14	2	16	23%	0.13%
October	12,230	84	0.69%	62	1	63	75%	0.52%
November	12,288	59	0.48%	18	2	20	34%	0.16%
December	12,248	2	0.02%	0	0	0	0%	0.00%
YTD Total	12,248	402	3.28%	94	9	103	26%	0.84%

¹ Includes all customers who failed SDG&E's FERA eligibility probability model.

² Includes customers verified as over income or who requested to be de-enrolled.

³ Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.

⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.

SDG&E PY 2022 FERA Annual Report

FERA Table 3B Post-Enrollment Verification Results (Electric only High Usage)

Month	Total FERA Households Enrolled	Households Requested to Verify ¹	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification	% of Total FERA Households De-enrolled
January	11,800	0	0.00%	0	0	0	0%	0.00%
February	11,683	0	0.00%	0	0	0	0%	0.00%
March	11,672	0	0.00%	0	0	0	0%	0.00%
April	12,548	0	0.00%	0	0	0	0%	0.00%
May	12,417	0	0.00%	0	0	0	0%	0.00%
June	12,319	0	0.00%	0	0	0	0%	0.00%
July	12,209	0	0.00%	0	0	0	0%	0.00%
August	12,195	0	0.00%	0	0	0	0%	0.00%
September	12,114	0	0.00%	0	0	0	0%	0.00%
October	12,230	0	0.00%	0	0	0	0%	0.00%
November	12,288	0	0.00%	0	0	0	0%	0.00%
December	12,248	0	0.00%	0	0	0	0%	0.00%
YTD Total	12,248	0	0.00%	0	0	0	0%	0.00%

¹ Includes all participants who were selected for high usage verification process.

² Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

³ Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.

San Diego Gas & Electric PY 2022 FERA Annual Report						
FERA Table 4						
FERA Self-Certification and Self-Recertification Applications ¹						
	Provided ²	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	7,500	3,414	2,276	491	289	358
Percentage		100%	67%	14%	8%	10%

¹ Includes sub-metered customers.

² The Provided value is a combination of both CARE and FERA applications sent to customers

FERA Table 4 A						
FERA Post-Enrollment Verification ¹						
	Requested	Received	Approved	Denied	Pending/Never Completed	
Total	402	308	299	9	94	

¹ Includes sub-metered customers.

San Diego Gas & Electric PY 2022 FERA Annual Report

FERA Table 5

FERA Enrollment by County

County	Estimated Eligible ²			Total Participants ³			Enrollment Rate ⁴		
	Urban	Rural ¹	Total	Urban	Rural	Total	Urban	Rural	Total
Orange	2102	0	2102	469	0	469	22%	0%	22%
San Diego	40415	1192	41607	11,483	296	11,779	28%	25%	28%
Total	42,517	1,192	43,709	11,952	296	12,248	28%	25%	28%

¹ Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.

² In accordance with Ordering Paragraph 189 of D.21-06-015, Annual FERA Eligibility Estimates filed February 12 of each year.

³ Total Households Enrolled includes submeter tenants.

⁴ Penetration Rate and Enrollment Rate are the same value.

San Diego Gas & Electric PY 2022 FERA Annual Report

FERA Table 6

FERA Recertification Results

2022	Total FERA Households	Households Requested to Recertify ¹	% of Households Total (C/B)	Households Recertified ^{2, 5}	Households De-enrolled ³	Recertification Rate % ⁴ (E/C)	% of Total Households De-enrolled (F/B)
January	11,800	134	1.1%	64	58	48%	0.49%
February	11,683	64	0.5%	27	25	42%	0.21%
March	11,672	6	0.1%	0	2	0%	0.02%
April	12,548	6	0.0%	0	1	0%	0.01%
May	12,417	2	0.0%	1	1	50%	0.01%
June	12,319	4	0.0%	0	4	0%	0.03%
July	12,209	5	0.0%	1	3	20%	0.02%
August	12,195	78	0.6%	8	64	10%	0.52%
September	12,114	160	1.3%	11	137	7%	1.13%
October	12,230	169	1.4%	12	146	7%	1.19%
November	12,288	231	1.9%	24	91	10%	0.74%
December	12,248	239	2.0%	5	50	2%	0.41%
YTD	12,248	1,098	8.96%	153	582	14%	4.75%

¹ Excludes count of customers recertified through the probability model.

² Recertification results are tied to the month initiated and the recertification process allows customers 120 days (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.

³ Includes customers who did not respond or who requested to be de-enrolled.

⁴ Percentage of customers recertified compared to the total participants requested to recertify in that month.

San Diego Gas & Electric PY 2022 FERA Annual Report

FERA Table 7

FERA Capitation Contractors

Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments ²			Total Expenditures
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
211 SAN DIEGO		X			-	17	17	\$ 340
ALPHA MINI MART	X				-	-	-	-
AMERICAN RED CROSS WIC OFFICES		X	X		-	-	-	-
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	-	-	-
COMMUNITY RESOURCE CENTER		X			-	-	-	-
ELDERHELP OF SAN DIEGO		X			-	-	-	-
HEARTS AND HANDS WORKING TOGETHER		X			-	-	-	-
HOME START		X			-	-	-	-
HORN OF AFRICA		X			-	-	-	-
INTERFAITH COMMUNITY SERVICES		X			-	-	-	-
LA MAESTRA FAMILY CLINIC		X			-	-	-	-
MAAC PROJECT		X		X	-	-	-	-
NEIGHBORHOOD HEALTH CARE		X			-	-	-	-
NORTH COUNTY HEALTH PROJECT, INC.	X				-	-	-	-
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	-	-	-
SAN YSIDRO HEALTH CENTERS		X			-	-	-	-
SCRIPPS HEALTH WIC		X			-	-	-	-
SOMALI BANTU ASSOCIATION OF AMERICA		X			-	-	-	-
SOMALI FAMILY SERVICES		X			-	-	-	-
VISTA COMMUNITY CLINIC		X			-	-	-	-
Total Enrollments and Expenditures					0	17	17	\$ 340

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

² Enrollments reflect new enrollments only.

San Diego Gas & Electric PY 2022 FERA Annual Report
FERA Table 8
FERA Average Monthly Usage & Bill

Average Monthly Electric Usage			
Residential Non-FERA vs. FERA Customers			
Customer	Electric KWh	Electric KWh	Total
	Tier 1	Tier 2 and Above	
Non-FERA	270.0	107.0	377.0
FERA	301.0	120.0	421.0

Average Monthly Electric Bill ²		
Residential Non-FERA vs. FERA Customers¹		
(Dollars per Customer)		
Customer	Electric	
Non-FERA	\$130.69	
FERA	\$130.48	

¹ Excludes master-meter usage.

² Average Monthly Electric Bill reflects residential Non-FERA (FERA) 2022 total billed.

FERA Table 9

FERA Surcharge & Revenue

Electric

FERA Surcharge and Revenue Collected by Customer Class

Customer Class	Average Monthly		FERA Surcharge as Percent of Bill	Total FERA Surcharge Revenue Collected	Percentage of FERA Surcharge Revenue Collected
	FERA Surcharge ¹	Monthly Bill			
Residential	\$0.12	\$123.77	0.1%	\$2,099,717	36.30%
Commercial	\$0.50	\$457.99	0.1%	\$762,115	13.18%
Agricultural	\$2.58	\$1,594.07	0.2%	\$116,138	2.01%
Large/Indust	\$15.14	\$10,052	0.2%	\$2,806,180	48.51%

¹ D.21-06-015 authorized FERA surcharge.