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November 29, 2023

**VIA ELECTRONIC MAIL ONLY**

Sherri Golden, Board Secretary  
New Jersey Board of Public Utilities  
44 S. Clinton Avenue  
P.O. Box 350  
Trenton, NJ 08625  
[Sherri.Golden@bpu.nj.gov](mailto:Sherri.Golden@bpu.nj.gov)

**Re: Quarterly Progress Report of South Jersey Gas Company – 1st Quarter Program  
Year 2024  
DOCKET NOS. QO19010040 & GO20090618**

Dear Secretary Golden:

Pursuant to the Board's current filing procedures, herein is the Quarterly Progress Report for the first quarter ("Q1") of Program Year 2024<sup>1</sup> ("PY24") of South Jersey Gas ("SJG" or "Company") with respect to its Clean Energy Act of 2018 ("CEA") Energy Efficiency ("EE") and Peak Demand Reduction ("PDR") Programs.

In accordance with the Order issued by the Board in connection with I/M/O the New Jersey Board of Public Utilities' Response to the COVID-19 Pandemic for a Temporary Waiver of Requirements for Certain Non-Essential Obligations, BPU Docket No. E020030254, Order dated March 19, 2020, this document is being electronically filed. No paper copies will follow.

**Energy Efficiency Program Progress - Executive Summary:**

As of the first quarterly report, SJG continues to focus on implementing residential, multi-family and commercial programs and educating customers, contractors, and retailers on the portfolio of programs.

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<sup>1</sup> For the purposes of these quarterly reports, the numbering of the quarters align to these dates: **Q1** (7/1/23-9/30/23); **Q2** (10/1/23 - 12/31/23); **Q3** (1/1/24 - 3/31/24); **Q4** (4/1/24 - 6/30/24).

The utilities continue to collaborate and participate on working calls to ensure consistent implementation, address joint budget needs, and support contractors.

The utilities are continuing to work on the development of the Statewide Coordinator (SWC) system that will facilitate the exchange of investments and energy savings between a Lead Utility and a Partner Utility. As of the date of this report, the SWC system is not yet fully tested and operational, therefore the utilities have not yet transferred information for expenditures and energy savings. As discussed during Utility Working Group collaborations, utilities are supporting the incentives for comprehensive projects that address both fuels with the intention to transfer all information through the SWC when the system is operational and integrated with each utility's program management software and tracking system. The joint utilities continue to hold weekly meetings to coordinate on program budgets. The utilities submitted a petition for consideration with a proposed solution for potential budget disparities and the BPU has approved. Accordingly, the information reflected within this quarterly report reflects all investments and financing made by South Jersey Gas including those as the Lead Utility on behalf of a Partner Utility. Energy savings shown within this report only reflects savings for South Jersey Gas's primary fuel.

SJG programs delivered 43,938 DTh of savings in the first quarter, or approximately 17% of the annual target.

### Residential Sector

- South Jersey Gas has contracted Honeywell as the implementation party for the residential programs, save for the Marketplace Program and the Behavioral Program which will be served by Uplight.
- The Existing Homes Home Performance with Energy Star program reported 330 DTh in energy savings or approximately 3% of the program's PY24 target. The Home Performance with ENERGY STAR Program saw 22 projects completed.
- The Behavioral program reported 11,115 DTh in energy savings or approximately 24% of the program's PY24 target. The Behavioral Program had 159,699 customers in this quarter's treatment group.
- The Efficient Products program reported 25,469 DTh in energy savings or approximately 16% of the program's PY24 target. The Company has been providing financing for HVAC upgrades through its Board-approved energy efficiency programs since 2009 and has established a robust trade ally network that promotes SJG's programs to customers. Since the inception of the current on-bill repayment program, as offered through the Efficient Products Program, the Company has experienced greater participation than originally forecasted.
  - The Marketplace Program saw 2,167 participants in this quarter.
  - The Appliance Rebates Program saw 460 participants in this quarter.
    - SJG offers appliance rebates at 60 retail outlets including large and independently-owned stores.

- The HVAC Program saw 1,613 participants in this quarter.
  - In this quarter, 36 of the HVAC program participants qualified for the supplemental incentive for Low to Moderate Income customers.
- The Quick Home Energy Check Up Program had 104 completed projects.
- The Moderate Income Weatherization Program had 160 completed projects.

#### Commercial Sector

- South Jersey Gas has contracted Applied Energy Group as the implementation party for the Commercial Programs.
- The Small Business Direct Install Program had 7 projects completed and an additional 2 audits were completed during the reporting period.
- The Prescriptive and Custom Program had 1 completed project in this quarter.
- The Engineered Solutions and Energy Management Programs did not deliver any savings during the reporting period but outreach efforts to larger customers are in progress and we expect these programs to start to ramp up.

#### Multi-Family Sector

- South Jersey Gas has contracted Honeywell as the implementation party for the Multi-Family Home Performance Program and Multi-Family Direct Install Program.
- South Jersey Gas has contracted Applied Energy Group as the implementation party for Multi-Family Engineered Solutions and Multi-Family Prescriptive and Custom Programs
- The Multi-Family: Direct Install program saw 181 participants this quarter.
- The Multi-Family: Prescriptive and Custom program saw 1 participant this quarter.
- Year to date, the Multi-Family sector has reported 1,085 DTh in energy savings or approximately 25% of the sector's PY24 target.

#### Comfort Partners Summary

SJG continues to partner with the BPU and our utility partners to implement Comfort Partners and support our low-income customers. Comfort Partners had 107 participants for this quarter resulting in 271 DTh annual savings. NJ Comfort Partners savings is under-stated due to recently transitioning the data system of record. A savings true-up will be necessary in a future report.

Table 1 shows the Company's overall performance as a percentage of retail sales, which includes retail sales reductions achieved by the Comfort Partners program, which is the primary program serving low-income customers and is co-managed by the Division of Clean Energy in conjunction with South Jersey Gas and the other investor-owned electric and gas utility companies.

**Table 1 – Program Year 2024 Program Results**

| Period Covered | Utility-Administered Retail Savings (DTh) <sup>1,2</sup> | Comfort Partners Retail Savings (DTh) <sup>1,2</sup> | Other Programs Retail Savings (DTh) <sup>3</sup> | Total Portfolio Retail Savings (DTh) <sup>1,2</sup> | Compliance Baseline (DTh) <sup>4</sup> | Annual Target (%) | Annual Target (DTh) | Percent of Annual Target (%) |
|----------------|--|--|--|---|--|-------------------|---------------------|------------------------------|
|                | (A)  | (B)  | (C)  | (D) = (A)+(B)+(C)                                   | (E)                                    | (F)               | (G) = (E)*(F)       | (H) = (D) / (G)              |
| Quarter        | 43,938   | 271  | N/A  | 44,209  |  |                   |                     |                              |
| YTD            | 43,938   | 271  | N/A  | 44,209  | 50,906,112                             | 0.51%             | 259,621             | 17%                          |

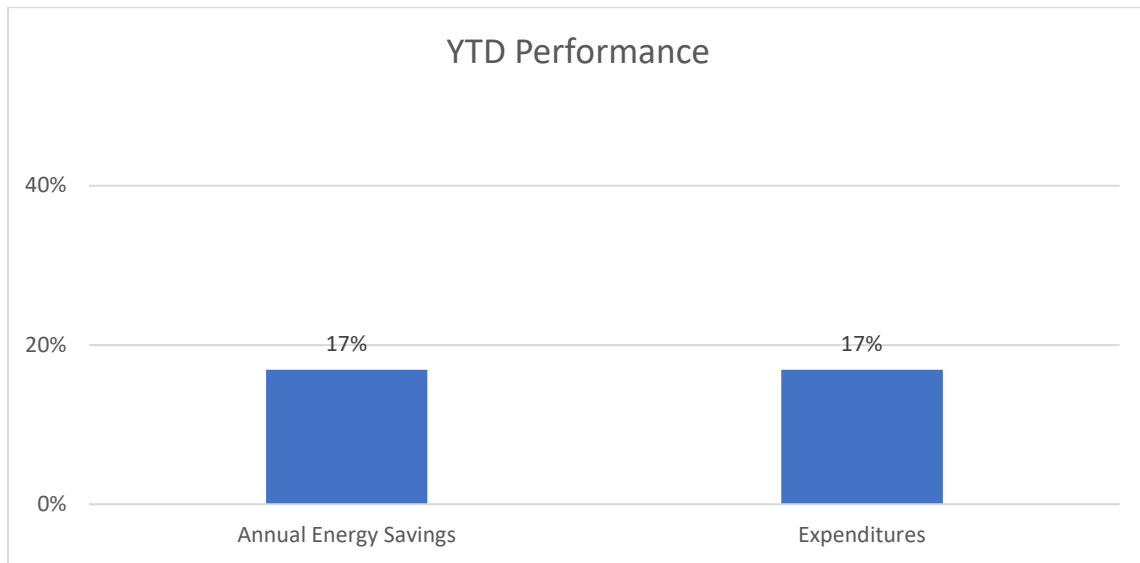
<sup>1</sup> Calculated savings at the retail (customer meter) level. Savings are estimated from participation counts and TRM calculations, where applicable.

<sup>2</sup> Encompasses all ex-ante savings for the Plan Year, including prior adjustments.

<sup>3</sup> Other Programs includes Company-specific programs that are not part of the Clean Energy Act (CEA) energy efficiency programs and Comfort Partners, such as legacy programs and pilots.

<sup>4</sup> Calculated as average annual gas usage in the prior three plan years (i.e., July – June) per N.J.S.A. 48:3-87.9(a). Details are provided in Appendix E.

Figure 1 shows that year to date natural gas savings is 17% of the PY24 annual savings goal, and program year to date spending is 17% of the PY24 expenditure target.



*Figure 1: YTD performance of Annual Energy Savings and Budget*

The Residential sector has represented 15% of the annual target savings. Low to Moderate-Income Savings was driven by the Moderate-Income Weatherization Program at 2,499 DTh in annual savings and 47,636 DTh in lifetime savings. This quarter, 7 Small Commercial projects in the C&I Direct Install program were completed for 2,826 DTh in annual savings.

Table 2 provides the results of the QPIs for all programs for which utilities are responsible, inclusive of the CEA-funded programs, Comfort Partners program (only included in low/moderate income lifetime savings), and any legacy energy efficiency programs administered by SJG that were authorized or funded by or through a prior filing or authorization.

**Table 2 – Quantitative Performance Indicators**

|   | Quarter                                     |   |                                       |  | Year to Date                            |                                     |                                   |                                    | Annual Target <sup>1</sup> | Percent of Annual Target Achieved |
|---|---|---|---------------------------------------|--|---|-------------------------------------|-----------------------------------|------------------------------------|----------------------------|-----------------------------------|
|   | Utility-Administered Quarter Retail Savings | Comfort Partners Quarter Retail Savings | Other Programs Quarter Retail Savings | Total Portfolio Quarter Retail Savings | Utility-Administered YTD Retail Savings | Comfort Partners YTD Retail Savings | Other Programs YTD Retail Savings | Total Portfolio YTD Retail Savings |                            |                                   |
| Annual Energy Savings (Dth)                             | 43,938                                      | 271                                     | N/A                                   | 44,209                                 | 43,938                                  | 271                                 | N/A                               | 44,209                             | 260,231                    | 17%                               |
| Lifetime Savings (Dth)                                  | 511,889                                     | 4,819                                   | N/A                                   | 516,708                                | 511,889                                 | 4,819                               | N/A                               | 516,708                            | 2,489,060                  | 21%                               |
| Annual Demand Savings (Dth Peak Day)                    |   |   |                                       |  |   |                                     |                                   |                                    |                            |                                   |
| Low/Moderate-Income Lifetime Savings (Dth) <sup>2</sup> | 54,164                                      | 4,819                                   | N/A                                   | 58,983                                 | 54,164                                  | 4,819                               | N/A                               | 58,983                             |                            |                                   |
| Small Commercial Lifetime Savings (Dth) <sup>3</sup>    | 45,541                                      |   | N/A                                   | 45,541                                 | 45,541                                  |                                     | N/A                               | 45,541                             |                            |                                   |

<sup>1</sup> Annual targets reflect estimated impacts as filed in the Company’s EE filing.

<sup>2</sup> Low/Moderate-Income lifetime savings are provided separately for Comfort Partners and any income-qualified Residential or Multi-Family program.

<sup>3</sup> Small Commercial lifetime savings are Direct Install program savings and those from C&I small business customers (<200 kW peak demand) in other programs.

### **Sector-Level Participation, Expenditures, and Annual Energy Savings**

Residential Programs had 164,225 participants and delivered 39,995 DTh of energy savings during the reporting period, amounting to 15% of the overall PY24 target. The savings were driven by the Efficient Products program, especially the Marketplace Program and its smart thermostats sales delivering 5,549 DTh of energy savings. The Efficient Products programs had 4,240 participants and delivered 25,469 DTh of energy savings. The Behavioral program had 159,699 participants and delivered 11,115 DTh of energy savings. The Multi-Family Programs

had 182 participants and delivered 1,085 DTh of energy savings. To date, the utility administered programs delivered 43,938 DTh in savings or 17% of the PY24 annual target.

Expenditures during the quarter are approximately 17% of the budget for PY24 and were driven by Residential Programs. The closing of multiple C&I and Multi-Family projects this quarter was also a contributing factor. We are partnering with our implementation teams to develop marketing and outreach plans to connect customers with trade allies, present projects, and establish a pipeline that will provide the participation needed to achieve our energy savings targets.

**Table 3 – Quarterly Sector-Level Participation**

| Sector <sup>1</sup>                               | Current Quarter Participants | YTD Participants | Annual Forecasted Participants | Percent of Annual Forecast |
|---|------------------------------|------------------|--------------------------------|----------------------------|
| Residential                                       | 164,225                      | 164,225          | 193,016                        | 85%                        |
| Multi-Family                                      | 182                          | 182              | 1,353                          | 13%                        |
| C&I   | 8                            | 8                | 1,164                          | 1%                         |
| Reported Totals for Utility Administered Programs | 164,415                      | 164,415          | 195,533                        | 84%                        |
| Comfort Partners <sup>2</sup>                     | 107                          | 107              | 4,420                          | N/A                        |
| Utility Total                                     | 164,522                      | 164,522          | 195,533                        | 84%                        |

<sup>1</sup> Please note that these numbers are totals across all programs within a sector. The appendix shows the participation numbers for individual programs.

<sup>2</sup> Comfort Partners, the primary program serving low-income customers, is co-managed by the Division of Clean Energy in conjunction with South Jersey Gas and the other investor-owned electric and gas utility companies.

### **Quarterly Level Expenditures**

The following table provides quarterly level expenditures by sector. South Jersey Gas’s expenses for this quarter were 17% of the PY24 budget.

**Table 4 – Quarterly Sector-Level Expenditures**

| Expenditures <sup>1</sup>                         | Current Quarter Expenditures (\$000) | YTD Expenditures (\$000) | Annual Budget Expenditures (\$000) | Percent of Annual Budget |
|---|--------------------------------------|--------------------------|------------------------------------|--------------------------|
| Residential                                       | \$6,974                              | \$6,974                  | \$38,931                           | 18%                      |
| Multi-Family                                      | \$142                                | \$142                    | \$3,130                            | 5%                       |
| C&I   | \$1,054                              | \$1,054                  | \$6,334                            | 17%                      |
| Reported Totals for Utility Administered Programs | \$8,170                              | \$8,170                  | \$48,395                           | 17%                      |
| Comfort Partners                                  | \$619                                | \$619                    | \$4,290                            | 14%                      |
| Utility Total                                     | \$8,789                              | \$8,789                  | \$48,395                           | 18%                      |

<sup>1</sup> Expenditures include rebates, incentives, and loans, as well as program administration costs allocated across programs.

## **Quarterly Level Energy Savings**

The Residential Sector largely contributed to the energy savings in this quarter, reporting 43,938 DTh of energy savings, or 17% of the PY24 annual target. This is attributed to the increased activity in the HVAC Program. As outreach efforts continue, we expect increased activity, and energy savings, for the Commercial and Multi-Family Sectors.

**Table 5 – Quarterly Sector-Level Annual Energy Savings**

| Annual Energy Savings <sup>1</sup>                | Current Quarter Retail (DTh) | YTD Retail (DTh) | Annual Target Retail (DTh) | Percent of Annual Target |
|---|------------------------------|------------------|----------------------------|--------------------------|
| Residential                                       | 39,995                       | 39,995           | 236,271                    | 17%                      |
| Multi-Family                                      | 1,085                        | 1,085            | 4,277                      | 25%                      |
| C&I   | 2,858                        | 2,858            | 19,684                     | 15%                      |
| Reported Totals for Utility Administered Programs | 43,938                       | 43,938           | 260,231                    | 17%                      |
| Comfort Partners <sup>2,3</sup>                   | 271                          | 271              | 25,527                     | N/A                      |
| Utility Total                                     | 44,209                       | 44,209           | 260,231                    | 17%                      |

<sup>1</sup> Annual Energy Savings represent the total expected annual savings from all energy efficiency measures within each sector.

<sup>2</sup> Comfort Partners Annual Target Retail Savings is a statewide target.

<sup>3</sup> Comfort Partners Annual Energy Savings is under-stated due to recently transitioning the data system of record.

## **Portfolio Expenditures Breakdown**

Program expenditures reflect South Jersey Gas expenditures for the first quarter as 17% of the PY24 budget.

**Table 6 – Quarterly Costs and Budget Variances by Category <sup>1</sup>**

| Total Utility EE/PDR                            | Quarter Reported (\$000) | YTD Reported (\$000) | Full Year Budget (\$000) | Percent of Budget Spent |
|---|--------------------------|----------------------|--------------------------|-------------------------|
| Capital Costs                                   | \$0                      | \$0                  | \$0                      | 0%                      |
| Utility Administration                          | \$260                    | \$260                | \$1,749                  | 15%                     |
| Marketing                                       | \$288                    | \$288                | \$1,108                  | 26%                     |
| Outside Services                                | \$310                    | \$310                | \$5,261                  | 6%                      |
| Rebates <sup>2</sup>                            | \$3,258                  | \$3,258              | \$19,570                 | 17%                     |
| No- or Low-Interest Loans                       | \$3,817                  | \$3,817              | \$18,778                 | 20%                     |
| Evaluation, Measurement & Verification (“EM&V”) | \$206                    | \$206                | \$1,592                  | 13%                     |
| Inspections & Quality Control                   | \$31                     | \$31                 | \$336                    | 9%                      |
| Utility EE/PDR Total                            | \$8,170                  | \$8,170              | \$48,395                 | 17%                     |

<sup>1</sup> Categories herein align to SJG’s EE plan as approved by the BPU.

<sup>2</sup> Rebates include rebates and other direct investments.

## Equity Metrics

These equity metrics draw from the considerable work of the New Jersey Office of Environmental Justice’s Overburdened Community (“OBC”) designations. Per New Jersey’s Environmental Justice Law, N.J.S.A. 13:1D-157, census block groups are identified as being an “Overburdened Community” when certain census criteria are met<sup>1</sup>, and metrics reported herein reflect further direction from BPU Staff<sup>2</sup>. These data are compiled into Table 7 detailing Equity Performance. South Jersey Gas has contracted Applied Energy Group on the development of Equity Metrics with the metrics agreed upon by the joint utilities.

<sup>1</sup> Per N.J.S.A. 13:1D-157: (1) at least 35 percent of the households qualify as low-income households; (2) at least 40 percent of the residents identify as a minority or as members of a State recognized tribal community; or (3) at least 40 percent of the households have limited English proficiency.

<sup>2</sup> Per guidance from BPU Staff, Overburdened Communities as used in Table 7 reflect those communities where at least 35 percent of the households qualify as low-income households, but exclude those communities that are solely designated as Minority, Limited English, or Minority and Limited English.



**Table 7 – Quarterly Equity Performance**

| Territory-Level Benchmarks             | Overburdened <sup>1</sup> | Non-Overburdened | %OBC <sup>2</sup> |
|--|---------------------------|------------------|-------------------|
| # of Household Accounts <sup>3</sup>   | 75,092                    | 294,981          | 20%               |
| # of Business Accounts <sup>3</sup>    | 8,655                     | 18,467           | 32%               |
| Total Annual Energy (Dth) <sup>4</sup> | 13,315,218                | 25,643,619       | 34%               |

| Programs                               | Sub Program or Offering                        | Types of Sub Program Offering | Quarter Overburdened <sup>1</sup> | Quarter Non-Overburdened | % OBC <sup>2</sup> | YTD Overburdened | YTD Non-Overburdened | % OBC <sup>2</sup> |
|--|--|-------------------------------|-----------------------------------|--------------------------|--------------------|------------------|----------------------|--------------------|
| <b>Participation</b>                   |  |                               |                                   |                          |                    |                  |                      |                    |
| Residential - Efficient Products       | HVAC   | Core                          | 197                               | 1,416                    | 12%                | 197              | 1,416                | 12%                |
|  | Appliance Rebates                              | Core                          | 56                                | 404                      | 12%                | 56               | 404                  | 12%                |
|  | Online Marketplace                             | Core                          | 372                               | 1,795                    | 17%                | 372              | 1,795                | 17%                |
|  | EE Giveaway Kits                               | Core                          | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
| Residential - Existing Homes           | Home Performance with Energy Star              | Core                          | 0                                 | 22                       | 0%                 | 0                | 22                   | 0%                 |
|  | Quick Home Energy Checkup                      | Additional                    | 39                                | 65                       | 38%                | 39               | 65                   | 38%                |
|  | Moderate Income Weatherization                 | Additional                    | 20                                | 140                      | 13%                | 20               | 140                  | 13%                |
| Behavioral                             | Behavioral                                     | Additional                    | 23,908                            | 135,791                  | 15%                | 23,908           | 135,791              | 15%                |
| C&I Direct Install                     | Direct Install                                 | Core                          | 5                                 | 2                        | 71%                | 5                | 2                    | 71%                |
| Energy Solutions for Business          | Prescriptive/Custom                            | Core                          | 0                                 | 1                        | 0%                 | 0                | 1                    | 0%                 |
|  | Energy Management                              | Additional                    | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
|  | Engineered Solutions                           | Additional                    | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
|  | Multi-Family Home Performance with Energy Star | Core                          | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
| Multi-Family                           | Multi-Family Direct Install                    | Core                          | 5                                 | 176                      | 3%                 | 5                | 176                  | 3%                 |
|  | Multi-Family Prescriptive / Custom             | Core                          | 1                                 | 0                        | 100%               | 1                | 0                    | 100%               |
|  | Multi-Family Engineered Solutions              | Core                          | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
|  | Total Core Participation                       |                               | 636                               | 3,816                    | 14%                | 636              | 3,816                | 14%                |
| Total Additional Participation         |  |                               | 23,967                            | 135,996                  | 15%                | 23,967           | 135,996              | 15%                |
| Total Participation                    |  |                               | 24,603                            | 139,812                  | 15%                | 24,603           | 139,812              | 15%                |
| <b>Annual Energy Savings (dth)</b>     |  |                               |                                   |                          |                    |                  |                      |                    |
| Residential - Efficient Products       | HVAC   | Core                          | 2,168                             | 14,554                   | 13%                | 2,168            | 14,554               | 13%                |
|  | Appliance Rebates                              | Core                          | 24                                | 173                      | 12%                | 24               | 173                  | 12%                |
|  | Online Marketplace                             | Core                          | 1,458                             | 7,091                    | 17%                | 1,458            | 7,091                | 17%                |
|  | EE Giveaway Kits                               | Core                          | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
| Residential - Existing Homes           | Home Performance with Energy Star              | Core                          | 0                                 | 330                      | 0%                 | 0                | 330                  | 0%                 |
|  | Quick Home Energy Check-Up                     | Additional                    | 317                               | 265                      | 54%                | 317              | 265                  | 54%                |
|  | Moderate Income Weatherization                 | Additional                    | 347                               | 2,151                    | 14%                | 347              | 2,151                | 14%                |
| Behavioral                             | Behavioral                                     | Additional                    | 1,664                             | 9,451                    | 15%                | 1,664            | 9,451                | 15%                |
| C&I Direct Install                     | Direct Install                                 | Core                          | 1,562                             | 1,264                    | 55%                | 1,562            | 1,264                | 55%                |
| Energy Solutions for Business          | Prescriptive/Custom                            | Core                          | 0                                 | 31                       | 0%                 | 0                | 31                   | 0%                 |
|  | Energy Management                              | Additional                    | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
|  | Engineered Solutions                           | Additional                    | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
|  | Multi-Family Home Performance with Energy Star | Core                          | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
| Multi-Family                           | Multi-Family Direct Install                    | Core                          | 32                                | 924                      | 3%                 | 32               | 924                  | 3%                 |
|  | Multi-Family Prescriptive / Custom             | Core                          | 129                               | 0                        | 100%               | 129              | 0                    | 100%               |
|  | Multi-Family Engineered Solutions              | Core                          | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
|  | Total Core Annual Energy Savings               |                               | 5,374                             | 24,368                   | 18%                | 5,374            | 24,368               | 18%                |
| Total Additional Annual Energy Savings |  |                               | 2,328                             | 11,868                   | 16%                | 2,328            | 11,868               | 16%                |
| Total Annual Energy Savings            |  |                               | 7,702                             | 36,236                   | 18%                | 7,702            | 36,236               | 18%                |
| <b>Lifetime Energy Savings (dth)</b>   |  |                               |                                   |                          |                    |                  |                      |                    |
| Residential - Efficient Products       | HVAC   | Core                          | 40,680                            | 273,391                  | 13%                | 40,680           | 273,391              | 13%                |
|  | Appliance Rebates                              | Core                          | 282                               | 2,037                    | 12%                | 282              | 2,037                | 12%                |
|  | Online Marketplace                             | Core                          | 11,014                            | 53,413                   | 17%                | 11,014           | 53,413               | 17%                |
|  | EE Giveaway Kits                               | Core                          | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
| Residential - Existing Homes           | Home Performance with Energy Star              | Core                          | 0                                 | 8,820                    | 0%                 | 0                | 8,820                | 0%                 |
|  | Quick Home Energy Checkup                      | Additional                    | 3,172                             | 2,659                    | 54%                | 3,172            | 2,659                | 54%                |
|  | Moderate Income Weatherization                 | Additional                    | 7,732                             | 39,904                   | 16%                | 7,732            | 39,904               | 16%                |
| Behavioral                             | Behavioral                                     | Additional                    | 1,664                             | 9,451                    | 15%                | 1,664            | 9,451                | 15%                |
| C&I Direct Install                     | Direct Install                                 | Core                          | 24,342                            | 21,199                   | 53%                | 24,342           | 21,199               | 53%                |
| Energy Solutions for Business          | Prescriptive/Custom                            | Core                          | 0                                 | 629                      | 0%                 | 0                | 629                  | 0%                 |
|  | Energy Management                              | Additional                    | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
|  | Engineered Solutions                           | Additional                    | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
|  | Multi-Family Home Performance with Energy Star | Core                          | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
| Multi-Family                           | Multi-Family Direct Install                    | Core                          | 323                               | 9,237                    | 3%                 | 323              | 9,237                | 3%                 |
|  | Multi-Family Prescriptive / Custom             | Core                          | 1,940                             | 0                        | 100%               | 1,940            | 0                    | 100%               |
|  | Multi-Family Engineered Solutions              | Core                          | 0                                 | 0                        | N/A                | 0                | 0                    | N/A                |
|  | Total Core Lifetime Energy Savings             |                               | 78,581                            | 368,727                  | 18%                | 78,581           | 368,727              | 18%                |
| Total Additional Participation         |  |                               | 12,568                            | 52,014                   | 19%                | 12,568           | 52,014               | 19%                |
| Total Lifetime Energy Savings          |  |                               | 91,149                            | 420,741                  | 18%                | 91,149           | 420,741              | 18%                |

<sup>1</sup> Across all programs, subprograms, or offerings, participation/expenditures/savings are classified as either in an Environmental Justice Overburdened Community census block or not based on the program participant’s address. Overburdened Community census blocks were developed and defined by the NJ Department of Environmental Protection ([www.nj.gov/dep/ej/communities.html](http://www.nj.gov/dep/ej/communities.html)).

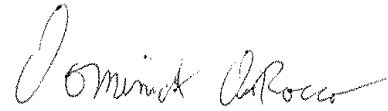
<sup>2</sup> The Ratio column shows the ratio of the overburdened metric over the non-overburdened metric. Comparing the territory-level benchmark ratios versus the program ratios shows how equitable the distribution of the program is between the overburdened and non-overburdened populations. If the program ratio is greater than the benchmark ratio, then the overburdened population is better represented in the program.

<sup>3</sup> Estimation of accounts with overburdened designation determined to be active immediately preceding the current Plan Year.

<sup>4</sup> Estimation of usage with overburdened designation for the 12-month period immediately preceding the current Plan Year.

If you have any questions, please feel free to contact me directly.

Respectfully,

A handwritten signature in black ink that reads "Dominick DiRocco". The signature is written in a cursive style with a large initial 'D' and a long horizontal stroke at the end.

Dominick DiRocco

DD/caj

cc: Brian Lipman  
Maura Caroselli  
Mamie Purnell  
Carlena Morrison  
Stacy Richardson  
Phillip Chao  
Ed McFadden  
Maureen Minkel  
Peter Druckenmiller  
Michael Savacool  
Frank Vetri

## Appendix A – Participant Definitions

| NJ Program                           | <b>Participants (as lead utility)</b>    |  |
|--------------------------------------|--|--|
| <b>Efficient Products</b>            | <b>HVAC</b>                              | Sum of HVAC units (multiple units per customer, counts as multiple participants)   |
|                                      | <b>Lighting - Upstream</b>               | Quantity of packages sold (based on SKU) - net of returns (negative in current period)   |
|                                      | <b>Rebated Products</b>                  | Quantity of units rebated (based on SKU)   |
|                                      | <b>Mid-Stream Products</b>               | Quantity of units sold (based on SKU) - net of returns (negative in current period)  |
|                                      | <b>Appliance Recycling</b>               | Count of visits to premise not units   |
|                                      | <b>Online Marketplace</b>                | Quantity of units sold (based on SKU) - net of returns (negative in current period)  |
|                                      | <b>EE Kits - Giveaway</b>                | Per kit delivered  |
|                                      | <b>Consumer Electronics</b>              | For rebated programs, count of rebate applications<br>For Midstream, every measure is considered a participant - net of returns (negative in current period) |
| <b>Existing Homes</b>                | <b>Home Performance with Energy Star</b> | Count of completed HPwES projects  |
|                                      | <b>Quick Home Energy Checkup</b>         | Count of completed visits  |
|                                      | <b>Moderate Income Weatherization</b>    | Same as HPwES - (distinction would be paying for audit in this program)  |
| <b>Behavioral</b>                    | <b>Behavioral</b>                        | Count of treatment customers at end of reporting period  |
| <b>C&amp;I Direct Install</b>        | <b>Direct Install</b>                    | Count based on number of applications/projects completed, not account number   |
| <b>Energy Solutions for Business</b> | <b>Prescriptive/Custom</b>               | Count based on number of applications/projects completed, not account number   |
|                                      | <b>Energy Management</b>                 | Count based on number of applications/projects completed, not account number   |
|                                      | <b>Engineered Solutions</b>              | Count based on number of applications/projects completed, not account number   |
| <b>Multi-Family</b>                  | <b>HPwES</b>                             | Count of completed HPwES projects  |
|                                      | <b>Direct Install</b>                    | Count based on number of projects completed  |
|                                      | <b>Prescriptive/Custom</b>               | Count based on number of applications/projects completed, not account number   |
|                                      | <b>Engineered Solutions</b>              | Count based on number of applications/projects completed, not account number   |

## SJG Energy Efficiency and PDR Savings Summary

South Jersey Gas Quarterly Report - Appendix B

For Period Ending PY24Q1

|   |  | Participation  |  |                                   |                              | Actual Expenditures |  |                                    |                        |
|---|--|----------------|--|-----------------------------------|------------------------------|---------------------|--|------------------------------------|------------------------|
|   |  | A              | B                                      | C                                 | D=C/B                        | E                   | F  | G                                  | H=G/F                  |
|   |  | Quarter        | Annual Forecasted Participation Number | YTD Reported Participation Number | YTD % of Annual Participants | Quarter (\$000)     | Annual Forecasted Program Costs (\$000) <sup>2</sup> | YTD Reported Program Costs (\$000) | YTD % of Annual Budget |
| <b>Residential Programs</b>               | <b>Sub Program or Category<sup>1</sup></b> |                |  |                                   |                              |                     |  |                                    |                        |
| Efficient Products*                       | HVAC                                       | 1,613          |  | 1,613                             |                              | \$4,707             |  | \$4,707                            |                        |
|   | Appliance Rebates                          | 460            |  | 460                               |                              | \$107               |  | \$107                              |                        |
|   | Marketplace Efficient Products             | 2,167          |  | 2,167                             |                              | \$304               |  | \$304                              |                        |
|   | EE Giveaway Kits                           | 0              |  | 0                                 |                              | \$0                 |  | \$0                                |                        |
|   | <b>Subtotal Efficient Products</b>         | <b>4,240</b>   | <b>40,456</b>                          | <b>4,240</b>                      | <b>10%</b>                   | <b>\$5,118</b>      | <b>\$23,828</b>                                      | <b>\$5,118</b>                     | <b>21%</b>             |
| Existing Homes                            | Home Performance with Energy Star*         | 22             | 360                                    | 22                                | 6%                           | \$516               | \$5,276  | \$516                              | 10%                    |
|   | Quick Home Energy Check-Up                 | 104            | 1,500                                  | 104                               | 7%                           | \$76                | \$1,067  | \$76                               | 7%                     |
|   | Moderate Income Weatherization             | 160            | 700                                    | 160                               | 23%                          | \$1,011             | \$7,716  | \$1,011                            | 13%                    |
| Behavioral                                | Behavioral                                 | 159,699        | 150,000                                | 159,699                           | 106%                         | \$253               | \$1,044  | \$253                              | 24%                    |
| <b>Total Residential</b>                  |  | <b>164,225</b> | <b>193,016</b>                         | <b>164,225</b>                    | <b>85%</b>                   | <b>\$6,974</b>      | <b>\$38,931</b>                                      | <b>\$6,974</b>                     | <b>18%</b>             |
| <b>Business Programs</b>                  | <b>Sub-Program</b>                         |                |  |                                   |                              |                     |  |                                    |                        |
| C&I Direct Install                        | Direct Install*                            | 7              | 25                                     | 7                                 | 28%                          | \$934               | \$2,087  | \$934                              | 45%                    |
| Energy Solutions for Business             | Prescriptive/Custom* <sup>3</sup>          | 1              | 1,133                                  | 1                                 | 0%                           | \$83                | \$1,244  | \$83                               | 7%                     |
|   | Energy Management                          | 0              | 5                                      | 0                                 | N/A                          | \$12                | \$600  | \$12                               | N/A                    |
|   | Engineered Solutions                       | 0              | 1                                      | 0                                 | N/A                          | \$24                | \$2,403  | \$24                               | N/A                    |
| <b>Total Business</b>                     |  | <b>8</b>       | <b>1,164</b>                           | <b>8</b>                          | <b>1%</b>                    | <b>\$1,054</b>      | <b>\$6,334</b>                                       | <b>\$1,054</b>                     | <b>17%</b>             |
| Multi-Family*                             | HPwES                                      | 0              |  | 0                                 |                              | \$8                 |  | \$8                                |                        |
|   | Direct Install                             | 181            |  | 181                               |                              | \$40                |  | \$40                               |                        |
|   | Prescriptive/Custom*                       | 1              |  | 1                                 |                              | \$4                 |  | \$4                                |                        |
|   | Engineered Solutions                       | 0              |  | 0                                 |                              | \$90                |  | \$90                               |                        |
|   | <b>Subtotal Multi-Family</b>               | <b>182</b>     | <b>1,353</b>                           | <b>182</b>                        | <b>13%</b>                   | <b>\$142</b>        | <b>\$3,130</b>                                       | <b>\$142</b>                       | <b>5%</b>              |
| <b>Other Programs</b>                     |  |                |  |                                   |                              |                     |  |                                    |                        |
| Home Optimization & Peak Demand Reduction |  |                |  |                                   |                              |                     |  |                                    |                        |
| <b>Total Other</b>                        |  |                |  |                                   |                              |                     |  |                                    |                        |
| <b>Portfolio Total</b>                    |  | <b>164,415</b> | <b>195,533</b>                         | <b>164,415</b>                    | <b>84%</b>                   | <b>\$8,170</b>      | <b>\$48,395</b>                                      | <b>\$8,170</b>                     | <b>17%</b>             |

<sup>1</sup> Subprograms provide relevant forecasts as included in the Company's approved EE/PDR Plans. Program delivery elements are generally listed as categories for informational purposes only.

<sup>2</sup> Annual Forecasted Program Costs reflect values anticipated in Board-approved Utility EE/PDR filings and may incorporate budget adjustments as provided for in the June 10, 2020 Board Order.

<sup>3</sup> Prescriptive/Custom Participation Number is reported on a Measure level.

\* Denotes a core EE program. Home Performance with Energy Star only includes non-LMI; the comparable program for LMI participants is Comfort Partners, which is jointly administered by the State and Utilities.

# SJG Energy Efficiency and PDR Savings Summary

South Jersey Gas Quarterly Report - Appendix B

For Period Ending PY24Q1

|   |  | Ex Ante Energy Savings                     |   |  |                                |   |   |  |  |
|---|--|--|---|--|--------------------------------|---|---|--|--|
|   |  | I  | J   | K  | L=K/J                          | M   | N   | O  | P  |
|   |  | Quarter Annual Retail Energy Savings (DTh) | Annual Forecasted Retail Energy Savings (DTh) | YTD Reported Retail Energy Savings (DTh) | YTD % of Annual Energy Savings | YTD Reported Wholesale Energy Savings (DTh) | YTD Peak Demand Savings (DT) <sup>3</sup> | Quarter Lifetime Retail Savings (DTh) <sup>4</sup> | YTD Lifetime Retail Savings (DTh) <sup>4</sup> |
| <b>Residential Programs</b>               | <b>Sub Program or Category<sup>1</sup></b> |  |   |  |                                |   |   |  |  |
|   | HVAC                                       | 16,722                                     |   | 16,722                                   |                                | 16,965                                      |   | 314,070  | 314,070  |
| Efficient Products*                       | Appliance Rebates                          | 197  |   | 0  |                                | 0   |   | 2,319  | 2,319  |
|   | Marketplace Efficient Products             | 8,549                                      |   | 8,549                                    |                                | 8,673                                       |   | 64,427   | 64,427   |
|   | EE Giveaway Kits                           | 0  |   | 197                                      |                                | 200   |   | 0  | 0  |
|   | Subtotal Efficient Products                | 25,469                                     | 161,982                                       | 25,469                                   | 16%                            | 25,838                                      | 0   | 380,817  | 380,817  |
| Existing Homes                            | Home Performance with Energy Star*         | 330  | 11,877  | 330                                      | 3%                             | 335   |   | 8,820  | 8,820  |
|   | Quick Home Energy Check-Up                 | 582  | 4,240   | 582                                      | 14%                            | 591   |   | 5,831  | 5,831  |
|   | Moderate Income Weatherization             | 2,499                                      | 11,507  | 2,499                                    | 22%                            | 2,535                                       |   | 47,636   | 47,636   |
| Behavioral                                | Behavioral                                 | 11,115                                     | 46,664  | 11,115                                   | 24%                            | 11,276                                      |   | 11,115   | 11,115   |
| <b>Total Residential</b>                  |  | <b>39,995</b>                              | <b>236,271</b>                                | <b>39,995</b>                            | <b>17%</b>                     | <b>40,575</b>                               | <b>0</b>                                  | <b>454,219</b>                                     | <b>454,219</b>                                 |
| <b>Business Programs</b>                  | <b>Sub-Program</b>                         |  |   |  |                                |   |   |  |  |
| C&I Direct Install                        | Direct Install*                            | 2,826                                      | 3,452   | 2,826                                    | 82%                            | 2,867                                       |   | 45,541   | 45,541   |
| Energy Solutions for Business             | Prescriptive/Custom* <sup>2</sup>          | 31   | 10,631  | 31                                       | 0%                             | 32  |   | 629  | 629  |
|   | Energy Management                          | 0  | 1,209   | 0  | N/A                            | 0   |   | 0  | 0  |
|   | Engineered Solutions                       | 0  | 4,392   | 0  | N/A                            | 0   |   | 0  | 0  |
| <b>Total Business</b>                     |  | <b>2,858</b>                               | <b>19,684</b>                                 | <b>2,858</b>                             | <b>15%</b>                     | <b>2,899</b>                                | <b>0</b>                                  | <b>46,170</b>                                      | <b>46,170</b>                                  |
| Multi-Family*                             | HPWES                                      | 0  |   | 0  |                                | 0   |   | 0  | 0  |
|   | Direct Install                             | 956  |   | 956                                      |                                | 0   |   | 9,560  | 9,560  |
|   | Prescriptive/Custom*                       | 129  |   | 129                                      |                                | 0   |   | 1,940  | 1,940  |
|   | Engineered Solutions                       | 0  |   | 0  |                                | 0   |   | 0  | 0  |
|   | Subtotal Multi-Family                      | 1,085                                      | 4,277   | 1,085                                    | 25%                            | 0   | 0   | 11,500   | 11,500   |
| <b>Other Programs</b>                     |  |  |   |  |                                |   |   |  |  |
| Home Optimization & Peak Demand Reduction |  |  |   |  |                                |   |   |  |  |
| <b>Total Other</b>                        |  |  |   |  |                                |   |   |  |  |
| <b>Portfolio Total</b>                    |  | <b>43,938</b>                              | <b>260,231</b>                                | <b>43,938</b>                            | <b>17%</b>                     | <b>43,474</b>                               | <b>0</b>                                  | <b>511,889</b>                                     | <b>511,889</b>                                 |

<sup>1</sup> Subprograms provide relevant forecasts as included in the Company's approved EE/PDR Plans. Program delivery elements are generally listed as categories for informational purposes only.

<sup>2</sup> Prescriptive/Custom Participation Number is reported on a Measure level

<sup>3</sup> On-going discussions within the Evaluation, Measurement and Verification (EM&V) Working Group have noted that there is no clearly defined protocol for calculating Peak Demand Savings for natural gas measures. It is anticipated that this issue will be addressed by the EM&V Working Group within this Triennial. No Peak Demand Savings for natural gas measures will be reported until an agreed upon methodology has been determined.

<sup>4</sup> Quarter Lifetime Retail Savings and YTD Lifetime Retail Savings for Behavioral is calculated based on a 1 year Measure Life

\* Denotes a core EE program. Home Performance with Energy Star only includes non-LMI; the comparable program for LMI participants is Comfort Partners, which is jointly administered by the State and Utilities.

# Energy Efficiency and PDR Savings Summary

South Jersey Gas Quarterly Report - Appendix C

For Period Ending PY24Q1

|   |  | Participation                     |                       | Incentive Expenditures (Customer Rebates and Low/no-cost financing) |                       | Ex Ante Energy Savings                   |                       |
|---|--|-----------------------------------|-----------------------|---|-----------------------|--|-----------------------|
|   |  | A                                 | B                     | C   | D                     | E  | F                     |
|   |  | Reported Participation Number YTD |                       | Reported Incentive Costs YTD (\$000)                                |                       | Reported Retail Energy Savings YTD (DTh) |                       |
| Residential Programs                      | Sub Program                                    | LMI                               | Non-LMI or Unverified | LMI   | Non-LMI or Unverified | LMI                                      | Non-LMI or Unverified |
| Efficient Products                        | HVAC   | 36                                | 1,577                 | \$114   | \$4,338               | 359                                      | 16,363                |
|   | Appliance Rebates                              | 0                                 | 460                   | \$0   | \$66                  | 0  | 197                   |
|   | Marketplace Efficient Products                 | 0                                 | 2,167                 | \$0   | \$209                 | 0  | 8,549                 |
|   | Efficient Products Kits                        | 0                                 | 0                     | \$0   | \$0                   | 0  | 0                     |
|   | Subtotal Efficient Products                    | 36                                | 4,204                 | \$114   | \$4,613               | 359                                      | 25,109                |
| Existing Homes                            | Home Performance with Energy Star <sup>1</sup> | 0                                 | 22                    | \$0   | \$358                 | 0  | 330                   |
|   | Quick Home Energy Check-Up                     | 0                                 | 104                   | \$0   | \$32                  | 0  | 582                   |
|   | Moderate Income Weatherization                 | 160                               | 0                     | \$835   | \$0                   | 2,499                                    | 0                     |
| Behavioral                                | Behavioral                                     | 0                                 | 159,699               | \$0   | \$225                 | 0  | 11,115                |
| <b>Total Residential</b>                  |  | <b>196</b>                        | <b>164,029</b>        | <b>\$950</b>  | <b>\$5,228</b>        | <b>2,858</b>                             | <b>37,137</b>         |
| Multi-Family                              | HPwES  | 0                                 | 0                     | \$0   | \$0                   | 0  | 0                     |
|   | Direct Installation/MF QHEC                    | 0                                 | 181                   | \$0   | \$21                  | 0  | 956                   |
| <b>Total Multifamily</b>                  |  |                                   |                       |   |                       |  |                       |
| Home Optimization & Peak Demand Reduction |  |                                   |                       |   |                       |  |                       |
| <b>Total Other</b>                        |  | <b>0</b>                          | <b>181</b>            | <b>\$0</b>  | <b>\$21</b>           | <b>0</b>                                 | <b>956</b>            |
| <b>Portfolio Total</b>                    |  | <b>196</b>                        | <b>164,210</b>        | <b>\$950</b>  | <b>\$5,250</b>        | <b>2,858</b>                             | <b>38,093</b>         |
| <b>Supportive Costs Outside Portfolio</b> |  |                                   |                       |   |                       |  |                       |

<sup>1</sup> Income-qualified customers are directed to participate through the Comfort Partners or Moderate Income Weatherization programs.

## Energy Efficiency and PDR Savings Summary

South Jersey Gas Quarterly Report - Appendix D

For Period Ending PY24Q1

|   |                      | Participation                     |                  | Incentive Expenditures (Customer Rebates and Low/no-cost financing) |                  | Ex Ante Energy Savings                   |                  |
|---|----------------------|-----------------------------------|------------------|---|------------------|--|------------------|
|   |                      | A                                 | B                | C   | D                | E  | F                |
|   |                      | Reported Participation Number YTD |                  | Reported Incentive Costs YTD (\$000)                                |                  | Reported Retail Energy Savings YTD (DTh) |                  |
| Business Programs                         | Sub-Program          | Small Commercial                  | Large Commercial | Small Commercial  | Large Commercial | Small Commercial                         | Large Commercial |
| C&I Direct Install                        | Direct Install       | 7                                 | 0                | \$873   | \$0              | 2,826                                    | 0                |
| Energy Solutions for Business             | Prescriptive/Custom  | 0                                 | 1                | \$0   | \$1              | 0  | 31               |
|   | Energy Management    | 0                                 | 0                | \$0   | \$0              | 0  | 0                |
|   | Engineered Solutions | 0                                 | 0                | \$0   | \$0              | 0  | 0                |
| <b>Total Business</b>                     |                      | <b>7</b>                          | <b>1</b>         | <b>\$873</b>  | <b>\$1</b>       | <b>2,826</b>                             | <b>31</b>        |
|   |                      |                                   |                  |   |                  |  |                  |
| Multi-Family                              | Prescriptive/Custom  | 0                                 | 0                | \$0   | \$0              | 0  | 0                |
|   | Engineered Solutions | 0                                 | 1                | \$0   | \$1              | 0  | 129              |
| <b>Other Programs</b>                     |                      | <b>0</b>                          | <b>0</b>         | <b>\$0</b>  | <b>\$0</b>       | <b>0</b>                                 | <b>0</b>         |
| Home Optimization & Peak Demand Reduction |                      |                                   |                  |   |                  |  |                  |
| <b>Total Other</b>                        |                      | <b>0</b>                          | <b>1</b>         | <b>\$0</b>  | <b>\$1</b>       | <b>0</b>                                 | <b>129</b>       |
|   |                      |                                   |                  |   |                  |  |                  |
| <b>Portfolio Total</b>                    |                      | <b>7</b>                          | <b>2</b>         | <b>\$873</b>  | <b>\$2</b>       | <b>2,826</b>                             | <b>161</b>       |
| <b>Supportive Costs Outside Portfolio</b> |                      |                                   |                  |   |                  |  |                  |

**Appendix E Quarterly Report Baseline Calculation  
For Period Ending PY24Q1**

| Energy Efficiency Compliance Baselines and Benchmarks (therms) |           |                  |                |             |                       |                     |  |   |   |  |   |  |
|--|-----------|------------------|----------------|-------------|-----------------------|---------------------|--|---|---|--|---|--|
| Gas Utility  | Plan Year | Sales Period     | Sales (therms) | Adjustments | Adjusted Retail Sales | Compliance Baseline | Overall Annual Energy Reduction Target (%) | Overall Annual Energy Reduction Target (therms) | State-Administered Annual Energy Reduction Target (%) | State-Administered Annual Energy Reduction Target (therms) | Utility-Administered Annual Energy Reduction Target (%) | Utility-Administered Annual Energy Reduction Target (therms) |
|  |           |                  | (A)            | (B)         | (C) = (A)-(B)         | (D)=Average (C)     | (E)  | (F) = (E) * (D)                                 | (G)   | (H) = (G) * (D)  | (I)   | (J) = (I) * (D)  |
| South Jersey Gas   | 2019      | 7/1/18 - 6/30/19 | 574,069,243    | 45,731,813  | 528,337,431           |                     |  |   |   |  |   |  |
|  | 2020      | 7/1/19 - 6/30/20 | 529,105,554    | 42,406,214  | 486,699,341           |                     |  |   |   |  |   |  |
|  | 2021      | 7/1/20 - 6/30/21 | 551,325,543    | 36,813,250  | 514,512,294           |                     |  |   |   |  |   |  |
|  | 2022      | 7/1/21 - 6/30/22 | 544,182,719    | 32,515,574  | 511,667,145           |                     |  |   |   |  |   |  |
|  | 2023      | 7/1/22 - 6/30/23 | 533,374,478    | 32,370,547  | 501,003,931           | 509,061,123         | 0.75%                                      | 3,817,958                                       | 0.24%   | 1,221,747  | 0.51%   | 2,596,212  |

Notes:

(A) Includes sales as reported on FERC Form-2, as adjusted for the given sales period (planning year)

(B) Includes adjustments to remove Electric Generation.