

# **LOW INCOME OVERSIGHT BOARD (LIOB) MEETING**

Friday, March 6, 2020  
10:00 a.m. – 3:45 p.m.

**Isaac Newton Senter Auditorium  
Santa Clara County Government Center  
70 West Hedding St.  
San Jose, CA 95110**

All meeting materials are available on the LIOB website at:  
[www.liob.org](http://www.liob.org)

## Low Income Oversight Board Members

**Benito Delgado-Olson**

**LIOB Chair**

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**Governor Appointee**

**Maria Stamas**

**LIOB Vice-Chair**

Western Director, Energy Affordability  
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**Public Member Position**

**Robert Castaneda**

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**Public Member Position**

**Genevieve Shiroma**

**Commissioner**

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**Commissioner**

**Jason Wimbley**  
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**CSD Appointee**

**Lisa Castilone**  
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**Public Member Position**

**Paul D. Irwin**  
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**Public Member Position**

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**Private Weatherization Contractor  
Representative**

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**Electrical/Gas Corporation  
Representative**

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**Water Corporation Representative**

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**Public Member Position Representative**



# Low Income Oversight Board Meeting

WWW.LIOB.ORG

Friday March 6, 2020

10:00 a.m. – 3:45 p.m.

**Isaac Newton Senter Auditorium  
Santa Clara County Government Center  
70 West Hedding St.  
San Jose, CA 95110**

## WebEx

The LIOB website ([www.liob.org](http://www.liob.org)) will be updated with WebEx log-in information in early March.

**Muting:** *We greatly appreciate your cooperation in reducing background noise on the audio connection by muting your line when you are not speaking.*

All meeting materials are available on the LIOB website at: [www.liob.org](http://www.liob.org)

## AGENDA

**Oral comments:** The LIOB will accept oral comments on each agenda item during the meeting, as well as general comments at the start of the meeting. Speakers must refrain from discussing matters pending before the Commission in any “ratesetting” or “adjudicatory” proceedings other than those in which this meeting has been formally noticed: A.19-11-003 (CARE/ESA), A.14-11-007 (CARE/ESA), A.15-02-001 (CARE/ESA), and R.15-03-010 (San Joaquin Valley).

10:00 – 10:15 a.m.      1. Welcome and Introductions - Benito Delgado-Olson, LIOB Chairperson and Genevieve Shiroma, CPUC Commissioner (15 min)

- Lisa Castilone, GRID Alternatives
- Paul Irwin, North Fork Rancheria Indian Housing

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10:15 – 10:25 a.m.      2. Election of the LIOB Chair and LIOB Vice-Chair – Kapil Kulkarni – Action Item (10 min)

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10:25 – 10:40 a.m.      3. Public Comment (15 min)

\*Public comment is intended to provide an opportunity for members of the public who wish to address the board on a topic that is not on the agenda. Members of the board are not allowed to take any formal action on an item not on the agenda. If possible, it is requested that public comment be limited to 2 minutes per speaker.



## Low Income Oversight Board Meeting

[WWW.LIOB.ORG](http://WWW.LIOB.ORG)

December 10<sup>th</sup>, 2019

10:40 – 10:45 a.m.	4. Approval of the December 10, 2019 LIOB Meeting Minutes - Action Item
10:45 – 11:00 a.m.	5. Comment from Community-Based Organizations – Discussion Item (15 min)
11:00 – 11:30 a.m.	6. Assembly Bill 1180 - Eliminating Transaction Fees on Water Utility Bill Payments by Credit and Debit Cards - Jeremy Ho (30 min)
11:30 – 11:45 a.m.	7. CPUC Standing Reports – Informational Items (15 min) <ul style="list-style-type: none"> <li>a. Legislative Update - Office of Governmental Affairs</li> <li>b. Energy Division Updates – Kapil Kulkarni</li> </ul>
11:45 a.m. – 12:00 p.m.	8. Local Elected Officials <ul style="list-style-type: none"> <li>• Cindy Chavez, Santa Clara County Supervisor</li> </ul>
<b>12:00 – 1:00 p.m.</b>	<b>Lunch</b>
1:00 – 1:25 p.m.	9. Building Decarbonization and the CPUC – Rory Cox (25 min)
1:25 – 1:30 p.m.	10. Coordination Report on Low Income Weatherization Program (LIWP) - Jason Wimbley, CSD (5 min)
1:30 – 2:00 p.m.	11. Updates on the Technical Advisory Committee, Disadvantaged Communities Advisory Committee, and related proceedings (30 min) <ul style="list-style-type: none"> <li>a. Technical Advisory Committee Update (Delgado-Olson &amp; Wimbley) <ul style="list-style-type: none"> <li>• Legislative Item: CARE Outreach through Public Assistance Programs</li> </ul> </li> <li>b. Disadvantaged Communities Advisory Committee Group Update (Castaneda)</li> <li>c. Update on the Disconnection and Affordability Proceedings (Stamas)</li> </ul>
2:00 – 2:15 p.m.	12. Subcommittee Reports (15 min) <ul style="list-style-type: none"> <li>a. Low Income Energy Assistance Programs Subcommittee <ul style="list-style-type: none"> <li>• Castaneda, Stamas, Watts, Wimbley, Rendler, and Medina</li> </ul> </li> <li>b. Legislative Subcommittee <ul style="list-style-type: none"> <li>• Delgado-Olson, Stamas, Watts, and Castaneda</li> </ul> </li> <li>c. Water and Climate Change Subcommittee</li> </ul>



## Low Income Oversight Board Meeting

[WWW.LIOB.ORG](http://WWW.LIOB.ORG)

December 10<sup>th</sup>, 2019

- Liman, Delgado-Olson, Castaneda, and Medina

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2:15 – 2:40 p.m.

13. Investor Owned Utilities ESA/CARE Status Reports (25 min)

- a. Board member questions on IOU status reports
  - *Instead of presenting, IOUs are asked to share their slides with the board in advance of the meeting and be prepared to answer questions*
- b. Energy Division presentation on rules regarding unspent funds
- c. Board member questions on unspent funds

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2:40 – 3:40 p.m.

14. Public Safety Power Shutoffs - IOUs (60 min)

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3:40 – 3:45 p.m.

15. Future Agenda Items/Closing

- Future Meeting Dates
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This is a public meeting. The meeting is accessible to the physical disabled. A person who needs a disability-related accommodation or modification in order to participate in the meeting, may make a request by contacting Gillian Weaver at [gillian.weaver@cpuc.ca.gov](mailto:gillian.weaver@cpuc.ca.gov) or sending a written request to 320 West 4<sup>th</sup> Street, Ste 520, Los Angeles, CA, 90013. Providing your request at least five (5) business days before the meeting will help ensure availability of the requested accommodation.

**All times indicated and the order of business is approximate and subject to change.**

For the purposes of the Commission's Rules of Practice and Procedure, Rule 8.3 (c)(1) regarding oral ex parte communications in ratesetting proceedings, this meeting has been noticed on the service lists of Applications A.19-11-003, et al; A.14-11-007, et al; A.15-02-001, et al; and R.15-03-010. A courtesy notice has also been sent to the following quasi-legislative proceedings: R.18-07-005 (Disconnections) and R.18-07-006 (Affordability).

1. Welcome and Introductions – Benito Delgado-Olson, LIOB Chairperson and Genevieve Shiroma, CPUC Commissioner
2. Election of the LIOB Chair and LIOB Vice-Chair – Kapil Kulkarni, CPUC
3. Public Comment
4. Approval of the December 10, 2019 LIOB Meeting Minutes – *Action Item*

## 6. ARTICLE SIX: OFFICERS

**6.1 Officers.** The LIOB shall have a Chair and a Vice-Chair, both of whom shall be members of the Board. These officers shall be elected by the members of the Board to serve a term of one year, and they may be re-elected. An officer shall continue to hold office until a successor has been elected and assumed office. However, if an officer ceases to be a member of the Board, the officer's appointment shall terminate.

**6.2 Duties.** The Chair shall be responsible for the general supervision and direction of the affairs of the Board. The Chair shall preside at all meetings of the Board. In the absence of the Chair, the Vice-Chair shall perform the duties of that office. If the Chair and Vice-Chair are unavailable for a meeting, the Chair shall appoint a temporary Chair for that meeting. The officers shall perform such other duties as from time to time may be prescribed by the Board.

## 7. ARTICLE SEVEN: EFFECTIVE DATE AND AMENDMENTS

**7.1 Effective Date.** This Charter shall become effective on the date it is approved by the Commission.

**7.2 Amendments.** This Charter is subject to amendment, termination or revocation at any time by order of the Commission.

## 8. ARTICLE EIGHT: LIMITATION ON POWER AND AUTHORITY

**8.1** While the LIOB shall have the power and authority to function consistent with this Charter, and in particular, to carry out the duties and responsibilities specified in Article Four of this Charter, it shall not have the authority to direct energy or water corporations to act or refrain from acting. Such authority shall remain solely with the Commission.

Low Income Oversight Board Meeting

*Draft meeting notes*

Tuesday December 10, 2019, 9AM-3PM

Civic Auditorium, Council Chambers Meeting Room

400 N. Douty St.

Hanford, CA 93230

Board Member Attendance:

Present: Delgado-Olson, Shiroma, Castaneda, Watts, Wimbley, Rendler, Medina, Linam  
(arrived late)

Absent: Stamas

Welcome and Introductions:

Board Chair Delgado-Olson opened the meeting at about 9:15AM. Commissioner Shiroma thanked the City of Hanford for hosting, and Board Member Medina for arranging this meeting. She thanked the Public Advisor's Office, specifically Heidi Williams and Jessie Levine, for helping to facilitate this meeting. She also announced that Gillian Weaver will be the new California Public Utilities Commission (CPUC) Energy Division (ED) liaison to the Board. She also looked forward to the many presentations on low-income programs.

Board Member Medina mentioned that Dolores Huerta would be attending the meeting later, and thanked Roger Snow for his assistance with setting up the meeting. Board Chair Delgado-Olson welcomed Dan Rendler of SCG to the LIOB, and began attendee introductions.

Public Comment:

There were no comments by members of the public.

Approval of September 16th LIOB Meeting Minutes – Action Item:

The Board approved the minutes from the September 16<sup>th</sup> meeting, with 5 votes in favor, 0 opposed, and 2 abstentions. (Board Member Linam arrived after this vote.)

Comments from Community-Based Organizations:

Robert Alcazar, the CEO of Proteus, welcomed the Board and attendees to the Central Valley. Proteus provides services to farmworkers, and has great partnerships with the local utilities, workforce investment boards, and federal, state, and local grantmakers. Proteus has been involved with low income programs since 1985.

Board Member Castaneda commented on seeing higher level employees in organizations that once received assistance, and that you can't go in the Central Valley without seeing a Proteus office. Proteus is a member agency of La Cooperativa, which provides emergency services to farmworkers. He also mentioned working with former Board Member Murphy-Roach on providing emergency assistance in PG&E territory.

Board Member Medina mentioned that she had been on an Energy Savings Assistance (ESA) program ride along with Proteus and commented on how professional it was.

Jeff Garner, the Executive Director of Kings Community Action, spoke about how the organization is a local anti-poverty agency, providing Head Start, child care, weatherization, domestic violence shelter, and other services to local residents. The organization also partners with Proteus and RHA on census, ESA, and other programs. Through a community needs study, the organization also found a need for utility bill assistance, and is partnering with Kings County Human Services Agency to better link weatherization to bill assistance to homelessness, for homeless prevention. Board Chair Delgado-Olson asked how the ESA program is going; Mr. Garner said that it's been a learning curve but that RHA has been very helpful.

### Coordination Report on Low Income Weatherization Program (LIWP):

Board Member Wimbley talked about how the Community Services and Development (CSD)/LIWP and IOU coordination has been mostly limited to low cost measures so not all funds will be spent. He would like to convene a meeting next year to discuss how all funds can be spent. He also talked about how the Public Safety Power Shutoffs (PSPS) are impacting low income households, and wants to see if CSD's Low Income Home Energy Assistance Program (LIHEAP) can be retooled to provide emergency services to these families.

Board Member Castaneda discussed that the Legislature is interested in looking further into low income program models and eligibility. Board Member Medina and Commissioner Shiroma discussed how weatherization can improve indoor air quality. Board Member Wimbley discussed how CSD has begun to set up quarterly meetings with ED to better coordinate the CSD and IOU programs.

At this point in the meeting, Commissioner Shiroma introduced former Senate Majority Leader Richard Polanco, now representing California Emerging Technology Fund (CaETF). Former Majority Leader Polanco discussed AB 1665, approved in 2017, that proposes to increase broadband connectivity to 98 percent of households by 2022 through dedicated funding and outreach. Former Majority Leader Polanco also cited figures of low broadband awareness and connectivity in each IOU territory, and believes that the IOUs have the authority to do online outreach of broadband availability, given the Environmental and Social Justice (ESJ) Action Plan, ESA/California Alternate Rates for Energy (CARE) applications, and PSPS.

Commissioner Shiroma spoke about how she is the lead Commissioner for Lifeline and spoke about the Boost Mobile pilot program. Board Chair Delgado-Olson spoke about KingsNet, the

local Internet Service Provider (ISP) built by the Kings County County Office of Education that eradicated the digital divide for all public school students in several school districts. Commissioner Shiroma spoke about the upcoming en banc (stakeholder engagement opportunities) meeting on January 22, 2020 regarding the future of the California Communications Grid, and discuss what is in the purview of the CPUC. Board Member Medina asked about creating a subcommittee and hearing presentations by the ISPs, noting that Lifeline is the segue to the internet.

### Self-Help Enterprises Update on San Joaquin Valley Proceeding efforts:

Abigail Solis of Self-Help Enterprises presented on the San Joaquin Valley proceeding efforts. Board Member Castaneda asked about remediation costs that exceed \$5,000; Ms. Solis responded that replacing appliances and related equipment has a high cost due to the fuel conversion. Board Member Watts asked about landlords' restrictions for raising rent; Ms. Solis responded that the restrictions are in place for five years. Board Member Linam asked about incentives for landlords to pass water savings on to tenant given master-metering; Ms. Solis responded that local water districts often have their own discount programs that the landlords must adhere to. Board Member Medina commented on how subprime lenders and other bad actors are using electrification projects to their advantage. Ms. Solis commented that she is doing lots of coordination with the IOUs, like a coworker, and that educating customers, through marketing materials and application packet, is key. Board Member Castaneda said there were lots of landlord-tenant issues; Ms. Solis will come back and provide updates. Board Member Wimbley asked about property protection; Ms. Solis responded that the participation agreement is tied to the house so move-outs aren't an issue.

### TEAM and CHANGES Report on outreach methods:

Ravi Mangat of the CPUC's News and Outreach Office announced that the program was on a five year contract. He mentioned that his team is working with the Energy Division on a solar guide for residents, as well as a one-page interactive map. Casey McFall of Milestone Consulting then presented on the program, discussing how participating Community Based Organizations (CBO) decide how to do outreach in their communities. She also mentioned how the events are only about outreach and do not include education (which would take too long). She also mentioned how traditional marketing and outreach does not work; social media also does not work since few participants are on it. She cited the example of a PG&E customer that received seven \$1 texts about PSPS that they did not sign up for. She also mentioned that bill fairs don't work in spread out territories like Los Angeles.

Board Member Watts commented that it is too easy for some vendors to commit fraud with a one-button electronic approach through an iPad, and prey on customers who don't know they can only receive a wireline or wireless Lifeline discount. Board Members Medina and Wimbley asked about issues with solar contractors and the guidebook; Ms. McFall responded that the solar guidebook only helps with customers who are interested in solar and does not address

customers who aren't in the market for solar but are getting scammed anyway. Commissioner Shiroma mentioned bringing in an expert panel on customer protection for best practices for use by the LIOB and low income community, and reiterated that vendors have to follow the law.

### CPUC Standing Reports:

A revised CPUC Legislative Update was included in the agenda packet.

Kapil Kulkarni of the CPUC's Energy Division presented the Energy Division update.

### Subcommittee Reports:

Board Chair Delgado-Olson said that the Low Income Energy Assistance Programs (LIEAP) subcommittee met to discuss the upcoming motion. He also mentioned that the Legislative subcommittee will reconvene in March 2020. He also mentioned that the Low Income Needs Assessment (LINA) subcommittee will meet in January 2020. Board Member Linam provided an update of the Water and Climate Change subcommittee meeting from December 2, 2019, including a summary of the Low Income Rate Assistance draft report required by AB 401. The draft report is being reviewed by Governor Newsom's office and includes three program design scenarios, including a discount program, a renters' credit, and a utility-administered program, totaling \$600 million in costs per year.

### Marin Clean Energy Presentation on its Application for a Multifamily Whole Building program under ESA:

Alice Havenar-Daughton presented on Marin Clean Energy's (MCE) Low Income Families and Tenants (LIFT) program. Board Member Castaneda confirmed that the current program is for deed-restricted buildings, whereas the new proposed program would include all buildings. He also mentioned that the use of Area Median Income (AMI) is a complex issue, and that Sacramento (the Legislature) may have an issue with a household earning \$100,000 being classified as low income under AMI rules. Board Chair Delgado-Olson asked for ED to provide continuing updates on the applications.

### Lunch

At this point, the meeting was adjourned for lunch. After lunch, Board Chair Delgado-Olson invited Dolores Huerta, of her eponymous foundation, and co-founder of United Farm Workers, to speak. Ms. Huerta spoke about California being the richest state in the country, but there is still high poverty in the San Joaquin Valley. She mentioned her foundation's work to reduce childhood poverty, which includes 450,000 children statewide, including 250,000 in deep poverty.

## ESA Multi-Family Single Administrator Issue:

Board Chair Delgado-Olson spoke about the background of the issue and motion, to have the LIOB provide recommendations for a third-party administered Multi-Family (MF) program that incorporates best practices. The board also highlighted and thanked Vice Chair Stamas and Boardmember Castaneda for their work and joint leadership on this issue. Board Member Castaneda spoke about the need to continue using the Multi Family Working Group (MFWG). Commissioner Shiroma spoke of her gratitude of the work done to present the motion, but will abstain on the vote.

The Board then introduced the motion and passed it, with the vote of 7 in favor, 0 opposed, and 1 abstention.

## Updates on the Technical Advisory Committee, Disadvantaged Communities Advisory Committee, and related proceedings:

Board Chair Delgado-Olson said the next TAC meeting to discuss barriers to sharing data between IOUs and agencies will meet in early January.

Board Member Castaneda said there was no update from the Disadvantaged Communities (DAC) Advisory Committee, and Board Chair Delgado-Olson stated since Vice Chair Stamas is absent, there is no update on the Disconnection or Affordability proceedings.

## Update on Solar on Multi Family Affordable Housing (SOMAH) Program:

Jae Berg of the Center for Sustainable Energy (CSE), one of the SOMAH Program administrator team members, presented on the program. Board Member Wimbley asked about eligibility and streamlining enrollment; Ms. Berg responded that eligibility is limited to MF properties that are deed-restricted with 80 percent of the units at 60 percent of AMI, or in a DAC. Ms. Berg also responded that SOMAH passes along customer information to the IOUs for ESA and other program eligibility. In responding to Commissioner Shiroma, Ms. Berg replied that the property must have a certificate of occupancy and is not for new construction. Ms. Berg mentioned that part of the 2020 outreach plan is targeted towards Local Governments, as well as increasing participation from DACs, other IOU territories (PacifiCorp and Liberty) and Tribal areas.

Ms. Berg also mentioned that the SOMAH predecessor program (MASH) created a lot of pent-up demand, especially with property owners, resulting in a wait list on the first day of enrollment in some territories. Board Member Watts asked about the \$100 million in initial funding going to seven contractors in a competitive process. Ms. Berg responded that the competitive process is only required for applicants that do not already have a developer. She also responded that the multiple bid requirement received a lukewarm reception by the industry and some negative contractor feedback. Board Member Watts asked whether ESA contractors are among the seven and if they are doing project audits. In responding to Board

Member Castaneda, Ms. Berg stated there are five completed installations but that projects are not required to report this until the end of the 18-month timeline.

Board Member Castaneda said that he attended the SOMAH outreach meeting in San Diego and thanked Tory Francisco of ED for his leadership.

In responding to Board Member Watts, Ms. Berg stated that the four CBOs providing outreach are Communities for a Better Environment, Environmental Health Coalition, CA Energy Justice Alliance, and Asian Pacific Energy Network.

At this point in the meeting, Commissioner Martha Guzman Aceves spoke, and thanked Commissioner Shiroma for her leadership in re-invigorating the LIOB. She also mentioned that she is the assigned commissioner for the SOMAH program.

### Investor Owned Utilities ESA/CARE Status Reports:

Due to time constraints, this item was postponed to the next LIOB meeting.

Action Item: Place on agenda for Q1 2020 LIOB meeting.

### IOU Presentations on Final Versions of their 2021-2026 ESA/CARE Applications, filed Nov 4, 2019:

The IOUs presented for about five minutes each on their final post-2020 ESA/CARE program applications, followed by Public Comment and Board Q&A.

A commenter from the United Ways of California noted that they are working with the IOUs on the digital divide and improving access to broadband. They also felt that it was appropriate to use ratepayer funds on outreach, per Decision 19-06-022.

Eduardo Gonzalez of Fresno State said that broadband is necessary for online access to the ESA and CARE programs.

Commissioner Shiroma reiterated that the LIOB is not the appropriate venue to discuss broadband, but agreed on the need for broadband for low income households. She said she can use her experience as the assigned Commissioner for the Lifeline program to bring to the LIOB.

Board Chair Delgado-Olson noted his prior experience of highlighting KingsNet as a model, specifically Kettleman City and Corcoran, and stated he is willing to work outside of his LIOB role to assist if needed.

Susan Walters of CalETF spoke about the need for broadband information to be included in IOU outreach. She also mentioned that the SDG&E territory has higher broadband penetration due to local institutions.

Board Member Castaneda appreciated all the work that went into the IOU applications, and referenced the prior LIOB recommendations white paper. He also spoke about a hierarchy of

need model, and the need to reduce the energy burden and increase conservation. He also spoke about how the programs are not based enough on analytics and should not be based on consumption. He also said that eligibility is an issue in terms of who is able to qualify. He also said that the IOUs are seeking investments in Information Technology (IT) and marketing, but a better investment would be in the program providers.

Board Member Medina asked about the impact to consumers, and noted the links between the internet, communications, and energy use.

Board Member Delgado-Olson discussed the impacts of PSPS, and how this 10-year timeline eclipses that of the next ESA/CARE program cycle of six years and asked how to incorporate generators and batteries. He asked the IOUs to provide input.

Commissioner Shiroma discussed her tour of the SDG&E Operations Center, including the use of batteries for medical rate customers (100 total), funded through the medical rate program. She also mentioned that she is the assigned commissioner for Microgrids, including a meeting on December 12, 2019, and to be cautious of scenarios where customers are paying for something that third-parties are making money off of.

Board Member Castaneda asked about using CARE lists to identify households so that we have better information when emergencies hit.

Commissioner Shiroma mentioned the upcoming pre-hearing conference (PHC) in January for the ESA/CARE, which is the legal start to the proceeding. She also talked about the importance of the IOUs incorporating workforce training into the applications, as well as metrics to track past performance and future goals.

### Future Agenda Items/Closing:

Board Chair Delgado-Olson mentioned the upcoming LINA and LIEAP subcommittee meetings in January 2020, thanked former Board Members Toledo and Gross for their services to the LIOB, and noted that these vacancies are being filled. He then adjourned the meeting at about 3:00PM.

### Complete Meeting Audio:

[ftp://ftp2.cpuc.ca.gov/AudioVisualFiles/Liob\\_12102109workshop\\_morning.wav](ftp://ftp2.cpuc.ca.gov/AudioVisualFiles/Liob_12102109workshop_morning.wav) - Morning Session

[ftp://ftp2.cpuc.ca.gov/AudioVisualFiles/Liob\\_12102109workshop\\_afternoon.wav](ftp://ftp2.cpuc.ca.gov/AudioVisualFiles/Liob_12102109workshop_afternoon.wav) - Afternoon Session

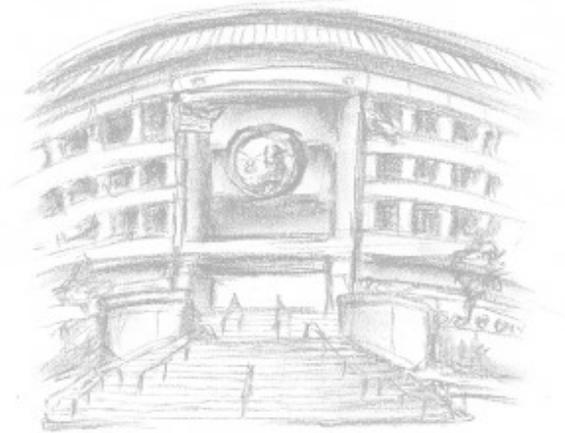
5. Comment from Community-Based Organizations – *Discussion Item*
6. Assembly Bill 1180 - Eliminating Transaction Fees on Water Utility Bill Payments by Credit and Debit Cards – Jeremy Ho, CPUC
7. CPUC Standing Reports – *Discussion Item*
  - a. Legislative Update - Office of Governmental Affairs
  - b. Energy Division Updates – Kapil Kulkarni
8. Local Elected Officials





# Assembly Bill 1180

## Eliminating Transaction Fees on Water Utility Bill Payments by Credit and Debit Cards *LIOB Presentation*



**Water Division**

**March 6, 2020**



## AB 1180 Summary

- **Public Utilities (PU) Code 755 (2005) allowed energy, telecommunications, and water utilities to charge a transaction fee to recover costs for customers paying with credit or debit cards.**
  - **9 water utilities offer payments through credit cards**
  - **2 water utilities waived transaction fees**
    - **California Water Service Company**
    - **Suburban Water Systems**
- **Assembly Bill 1180 passed in 2016 created PU Code 755.5 and 915 which offered Class A water utilities the opportunity to analyze whether transaction fees should be removed in their General Rate Case (GRC).**





## PU Code 755.5 Legislation Summary for Utilities

The pilot program lasts the length of the GRC and participating water utilities are required to:

- **Waive transaction fees for customers paying by credit card, debit card, and prepaid card**
- **Collect information on the various forms of payment**
  - Costs effectiveness of payment options
  - Customer utilization
  - Customer expectations and satisfaction
- **Notify customers of temporary nature of pilot program**
- **Limited to duration of rate case cycle**
  - 3 utilities were chosen to operate the pilot program



## Utilities Participating in Pilot Program

- **California American Water Company (2018-2020)**
  - Charges Card and E-check Fee of \$1.95
- **Golden State Water Company (2019-2021)**
  - Charges \$1.45
- **Great Oaks Water Company (2019-2021)**
  - Charges Card and Bank Fee
    - \$1.95 for Interactive Voice Response system
    - \$2.95 for Customer Service Representative





## PU Code 915 Reporting to Legislation

- **Commission and LIOB collaborate to assess the following items:**
  - **Credit cards to avoid service disconnections by low-income customers**
  - **Impact using a credit card to pay water bills on household debt burden**
  - **Customer bill payment preferences**
  - **Cost-effectiveness of various payment options**
  - **Levying a transaction fee on customers paying by credit, debit, or prepaid card serves customers' interests.**



# Data Request Challenges

- **Billing Data**
  - Either “fully paid” or “not paid”
  - SB 998 increased disconnection length
  - Possible double counting of customers
- **Household Burden**
  - Different types of credit card fees
- **Not Enough Data**
  - Most utilities have less than a year’s worth of data to see the impact for waiving the transaction fees
- **Cost-effectiveness on Different Payment Options**
  - In-person or by mail costs estimates



## Data Requests

- **Monthly bill payments with transaction fees vs other (indication of low income for each category)**
  - Total customers
  - Credit Card
  - Other payments with transaction fees
  - All other payments
- **Additional requests for costs analysis for different payment options**





# Additional Questions?





# Thank You

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## California Public Utilities Commission

### Legislative Update – Office of Governmental Affairs

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*Bills of Interest to the Low-Income Oversight Board  
Meeting – Friday March 6, 2020*

The Legislature reconvened on January 6<sup>th</sup> and the bill introduction deadline was on February 21<sup>st</sup>. Several members have introduced bills with the intention of legislating around the LifeLine program, however only one bill so far has substantive language included. A summary is provided below:

#### **1. Assembly Bill 3079 (E. Garcia) - Telecommunications: universal service: lifeline program**

This bill would require the commission, on or before July 1, 2021, to update the portability freeze rule to include a 6-month duration of the portability freeze. The bill would require the commission to adopt updated rules for the lifeline program that include a modified recertification process and other changes relating to enrollment, participation, and renewal in the program. The bill would require that the commission authorize only commission-approved telephone corporations to provide service using lifeline program funding and require the commission, before July 1, 2022, to determine whether to permit a lifeline telephone service subscriber to have an additional lifeline subscription for broadband services. The bill would require the commission to annually report to the Legislature on the implementation of those updated rules and lifeline participation and renewal levels by ZIP Code until specified participation goals are achieved.



# Energy Division Program Proceeding Updates

**Staff Briefing for the Low Income Oversight Board  
(LIOB) Meeting  
March 6<sup>th</sup>, 2020**

**Energy Division  
California Public Utilities Commission (CPUC)**





❖ **Disconnection OIR Update**

❖ **ESA/CARE Proceeding**

❖ **Low Income Needs Assessment**





## Disconnection OIR Update

- Phase 1 will examine current policies and changes that can be made to reduce disconnections to a target by January 1, 2024. Proposed decision in Phase 1 by 2nd quarter 2020.
  - D.18-12-013 created interim measures to reduce disconnections as proceeding continues
    - Prevents disconnections of elderly and medical baseline customers (subject to payment plan)
    - Prevents disconnections during extreme weather
    - Provides a goal for each utility of maintaining disconnections at 2017 level
  - A ruling was issued in November 2019 to solicit parties' comments on policy proposals that address disconnections, including an arrearage management program, a percentage of income payment plan pilot, and benefit of service process reform proposal.
  - Energy Division published the second workshop report in October 2019 and will submit a legislative report in April 2020.
- Phase 1-A will address disconnections in SMJU territories.
- Phase 2 will take a broader look at the disconnection process and consider innovative solutions.





## ESA/CARE Proceeding

- The IOUs submitted applications for their post-2020 ESA/CARE programs on November 4th.
- The CPUC held a pre-hearing conference on January 17<sup>th</sup>, and released a scoping memo on February 18<sup>th</sup>.
- ED is working with the IOUs to schedule workshops during March and April.





## 2022 Low Income Needs Assessment Recent Activity

- In January 2020, the Energy Division granted the IOUs authority to move forward with the 2022 Low Income Needs Assessment via advice letter approval.
- The LIOB also held a LINA subcommittee meeting in January to discuss topics to include in the project scope.
- The Scope of Work is currently under development for review and consideration and is expected to be completed in March 2020.





## 2022 Low Income Needs Assessment Upcoming Activity

- Once the scope of work is finalized a request for proposal will be issued to solicit bids and select a consultant to conduct and complete the study.
- The statutory deadline to complete this study is December 2022.
- Coordination and collaboration between the Energy Division, IOUs and the LIOB and opportunities for stakeholder engagement will be ongoing throughout the process.





# 2022 Low Income Needs Assessment Tentative Schedule

2022 Low Income Needs Assessment Tentative Schedule													
Tasks	2019	2020				2021				2022			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Advice Letter Submitted													
Advice Letter Approved													
LIOB LINA Subcommittee Meeting													
Develop Scope of Work													
Stakeholder Input Workshop													
Request for Proposal/Bid Solicitation													
Consultant Selection/Hiring													
Develop Research Plan													
Research Plan Workshop													
Data Collection and Analysis													
Complete Draft Report													
Draft Report Workshop													
Finalize and Post Report													



9. Building Decarbonization and the CPUC – Rory Cox, CPUC
  
10. Coordination Report on Low Income Weatherization Program (LIWP) - Jason Wimbley, CSD



# Building Decarbonization and the CPUC

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Low Income Oversight Board

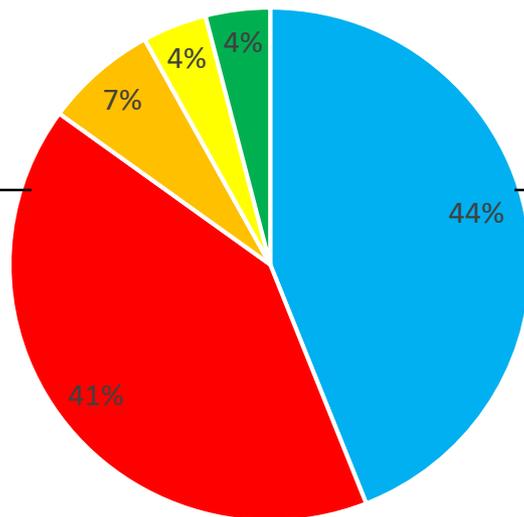
March 6, 2020

Rory Cox, Analyst, CPUC



# The Problem: 10% of GHGs directly from Buildings

Shares of Natural Gas Consumption by End Use, Residential



■ Space Heating ■ Water Heating ■ Cooking ■ Clothes Dryers ■ Pools and Hot Tubs

- 70% of direct emissions come from residential sector
- Most emissions (85%) come from space and water heating



# What is Building Electrification? (Ex. 1): Space Heating



**Gas**



**Electric (heat pump)**



# What is Building Electrification? (Ex. 2): Water Heating



**Gas**



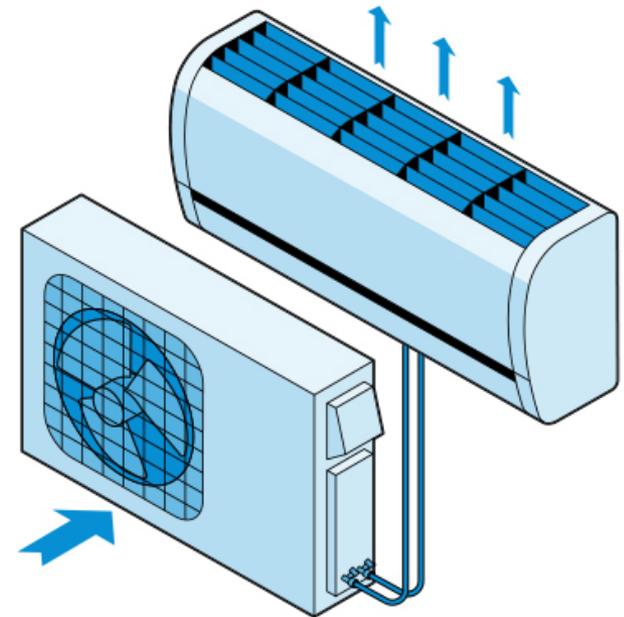
**Electric (heat pump)**



# Building Decarbonization Policy Context: Legislation

## Legislation Summary

- **SB 100 (De Leon)** – 60% of electricity must come from renewable sources by 2030, carbon free by 2045.
- **AB 3232 (Friedman)**: Requires CEC to produce plans (with CPUC) to reduce buildings emissions by 40% by 2030.
- **SB 1477 (Stern)**: Allocates \$50 million/year for BUILD and TECH programs, 30% for low income customers. Administered by CPUC.
- **SB 1013 (Lara)**: Puts state on path to low GWP refrigerants.
- **SB 49 (Skinner)**: Encourages development of “smart” appliances for load management





# Building Decarbonization Proceedings

## CPUC Proceedings - Highlights

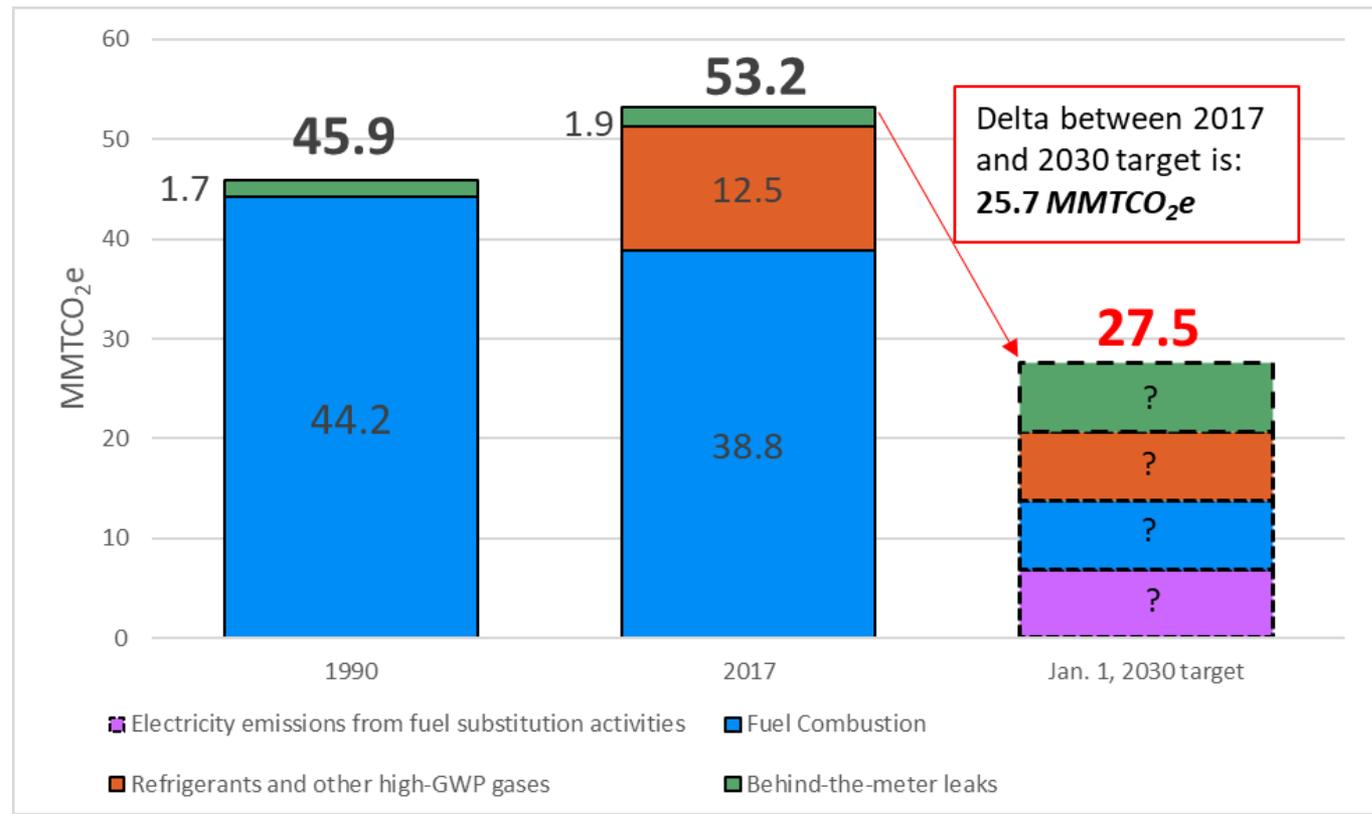
- **R.15-03-010** – \$56 million for Disadvantaged Communities in San Joaquin Valley.
- **R.19-01-011** –
  - \$120 million for space and water heating in existing homes (TECH).
  - \$80 million for low income new construction (BUILD).
- **R.12-11-005** – Funding from the Self Generation Incentive Program of \$41 million available for elec. heat pump water heaters, with an additional \$4 million for low income customers
- **R.13-11-005**
  - Revised rules so energy efficiency funding could be used for “fuel substitution”, allowing access to \$600 million budget.
  - Approved \$250 million for Market Transformation Activities.
- **There’s more**—a minimum of \$381 million has been authorized for building decarbonization





# State's Goals for Building Decarbonization

- **AB 3232 (Friedman):** Requires CEC to produce a plan (with CPUC) to reduce buildings emissions by 40% by 2030.
- CEC, working with CPUC, has begun process.



From CEC Presentation given at Dec. 4, 2019, workshop, "Building Decarbonization Assessment Baseline."



# Low GWP Refrigerant Policy

## Global Warming Potential (GWP) of Common Refrigerants

Low GWP

Mid GWP

High GWP

Refrigerant	100-yr GWP	Uses
R-717 (Ammonia)	0	Industrial Heat pump for non-residential buildings
R-600a (Iso-Butane)	0	Industrial heat pump technology replacement for R-22
R-600 (N-Butane)	0	Industrial heat pump technology
R-744 (CO2)	1	Currently used for water heat pumps around the world and marketed in the US, cost issue
R-290 (Propane)	4	Used widely in Europe
R-1234yf and R-1234ez	4	Residential heat pumps for water heaters
R-447A (HFO L-41)	583	Replacement for R-410a in residential heat pumps
R-454B (HFO DR-5A)	466	Replacement for R-410a in residential heat pumps
R-32	675	Drop in replacement for R-410a in residential heat pumps
DR-55 HFO	698	Mini Split Air Conditioner replacement for R-410a
R-466A	733	Non-flammable replacement for wide use in heat pumps
R-134a	1430	Current wide use in heat pumps
R-22	1810	Current wide use in air conditioners
R-410a	2088	Current wide use in heat pumps

- CEC’s Building Energy Efficiency Standards defines low GWP as < 150 GWP
- CARB has proposed requiring refrigerants of < 150 GWP by 2022.
- SB 1477 pilots: Incentives only for Mid-GWP refrigerants
- Kicker incentives for using low GWP refrigerants



# CPUC's Proceeding on Building Decarbonization (R.19-01-011)

## 1. Implementation of SB 1477

- Authorizes the CPUC to select a program implementer for BUILD and TECH programs
  - A. BUILD = Building Initiative for Low Emissions Development
  - B. TECH = Technology and Equipment for Clean Heating
- May set rules and guidelines for program implementation, including design, participant eligibility, incentive levels, evaluation protocols
- BUILD – Largely an all-electric, new construction program for low income housing
- TECH – Largely focused on manufacturers, distributors, and contractors.



Habitat for Humanity all electric, ZNE home, Santa Ana. Photos: Orange County Register



# CPUC's Proceeding on Building Decarbonization

## 2. Pilot programs for post-fire rebuilding

- Considers consistent, unified statewide approach for fire victims to rebuild homes all electric
- CPUC approved a PG&E program in Northern California, with Sonoma Clean Power as a partner.
- CPUC approved similar program for SCE's territory.



Photo: Sonoma Magazine



# CPUC's Proceeding on Building Decarbonization

## 3. Building and Appliance codes and standards

- CPUC will consider specific program policies, procedures, and rules to incent builders to choose Title 24 compliance pathways that maximize GHG reductions.

## 4. Develop a Building Decarbonization Policy Framework

- Development of a coherent and comprehensive set of Commission rules, policies, and procedures to accelerate the reduction of GHG from buildings.
- Draw on lessons learned from the smaller-scale programs authorized by SB 1477 to scale up, including rate design.
- Possible topics: Rate design and financing

JOHN BELL, December 17, 1933

# Of course it's clean -it's electric!

IF YOU THINK that 'what was good enough for mother is good enough for me', have a look at your neighbour's new electric cooker. The first thing you'll notice is that it's clean. Doubtful? Then make a simple test: look at the bottoms of her saucepans—they're spotless! There's no grime to soil and blacken pans. What's more, the surfaces of an electric cooker are smooth; a quick wipe with a damp cloth and they're sparkling!

It's the radiant heat that guarantees tender meat and tin's full-bodied flavours. Electric heat is concentrated heat; it goes right under the saucepan and all around the food in the oven, so of course it cooks evenly right through. Natural juices stay in the food; so you get the full flavour.

Superb cooking is a matter of perfect heat control. That's where electric cookers really score—you get the exact heat you want. The modern automatic electric cooker switches itself on, cooks the meal and switches itself off—all while you're out of the kitchen or out of the house!

Just add up all the advantages of an electric cooker: superb, quick cooking; easy, exact control; a clean, cool kitchen; safety. There's nothing to beat an electric cooker. Come and see for yourself!

The electric cooker is one of the Four Foundations of Modern Living

ELECTRIC COOKER    ELECTRIC REFRIGERATOR    ELECTRIC WATER HEATER    ELECTRIC WASHING MACHINE

**Call in at your Electricity Service Centre... where you can see a wide variety of modern electric cookers and get helpful advice.**

Issued by the Electrical Development Association



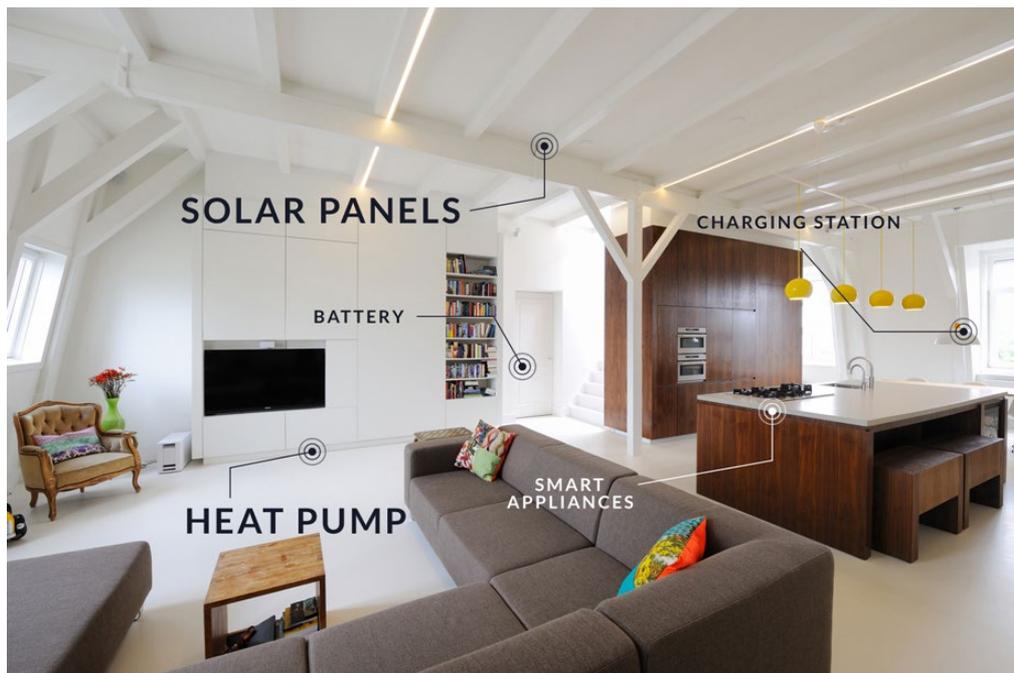
## Metrics: GHG Reductions and Bill Savings for BUILD and TECH

- SB 1477 requirements
  - Cost per metric ton of avoided GHG emissions
  - Projected annual and lifetime utility bill savings
  - Number of low-emission systems installed (BUILD)
  - Market share for eligible technologies (TECH)
- Cap-and-Trade fund requirements:
  - Total avoided GHG emissions from each year's expenditures
  - Total expenditures
  - Itemization of administration and outreach expenditures





# Questions?



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Image: <https://www.thefctre.com/en/>

# 11. Updates on the Technical Advisory Committee, Disadvantaged Communities Advisory Committee, and related proceedings

## a. Technical Advisory Committee Update (Delgado-Olson & Wimbley)

- Legislative Item: CARE Outreach through Public Assistance Programs

## b. Disadvantaged Communities Advisory Committee Group Update (Castaneda)

## c. Update on the Disconnection and Affordability Proceedings (Stamas)

## 12. Subcommittee Reports

- a. Low Income Energy Assistance Programs Subcommittee
  - Castaneda, Stamas, Watts, Wimbley, Rendler, and Medina
- b. Legislative Subcommittee
  - Delgado-Olson, Stamas, Watts, and Castaneda
- c. Water and Climate Change Subcommittee
  - Liman, Delgado-Olson, Castaneda, and Medina

### 13. Investor Owned Utilities ESA/CARE Status Reports

- a. Board member questions on IOU status reports
- b. Energy Division presentation on rules regarding unspent funds
- c. Board member questions on unspent funds

### 14. Public Safety Power Shutoffs – IOUs

### 15. Future Agenda Items/Closing



# Joint IOU Report of the CARE and ESA Programs

Low Income Oversight Board Meeting  
San Jose, CA  
March 6, 2020

# CARE Program

PU Code Section 739.1(a) requires the CPUC to establish a program of assistance to low-income electric and gas customers with annual household incomes that are no greater than 200 percent of the federal poverty guideline levels.

## 2019 YTD CARE Program Updates \*

Authorized 2019 Program Budgets Expenditures				
Utility	2019 Budget	YTD Expenditures	%	YTD Rate Discounts
PG&E	\$18,683,781	\$11,415,518	61%	\$650,117,327
SCE	\$6,791,638	\$6,155,745	91%	\$365,302,843
SDG&E	\$7,227,114	\$5,969,507	83%	\$117,947,051
SoCalGas	\$10,091,122	\$6,892,681	68%	\$133,972,855
<b>Total</b>	<b>\$42,793,655</b>	<b>\$30,433,451</b>		<b>\$1,267,340,076</b>

2019 YTD Enrollment and Penetration						
Utility	Total Residential Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled	Penetration Rate	Newly Enrolled Customers
PG&E	5,507,346	1,446,414	26%	1,382,663	96%	234,273
SCE	4,455,442	1,337,092	30%	1,185,146	89%	252,196
SDG&E	1,347,344	319,125	23%	298,719	94%	72,371
SoCalGas**	5,622,313	1,685,526	30%	1,609,738	96%	313,763
<b>Total</b>	<b>16,932,445</b>	<b>4,788,157</b>		<b>4,476,266</b>		<b>872,603</b>

\* 2019 YTD through December 31, 2019, as reported in the IOU ESA-CARE Monthly Report (filed January 21, 2020).

\*\* Total residential gas households. This includes sub-metered households.



# CARE Program *CARE Penetration map*

**PG&E**

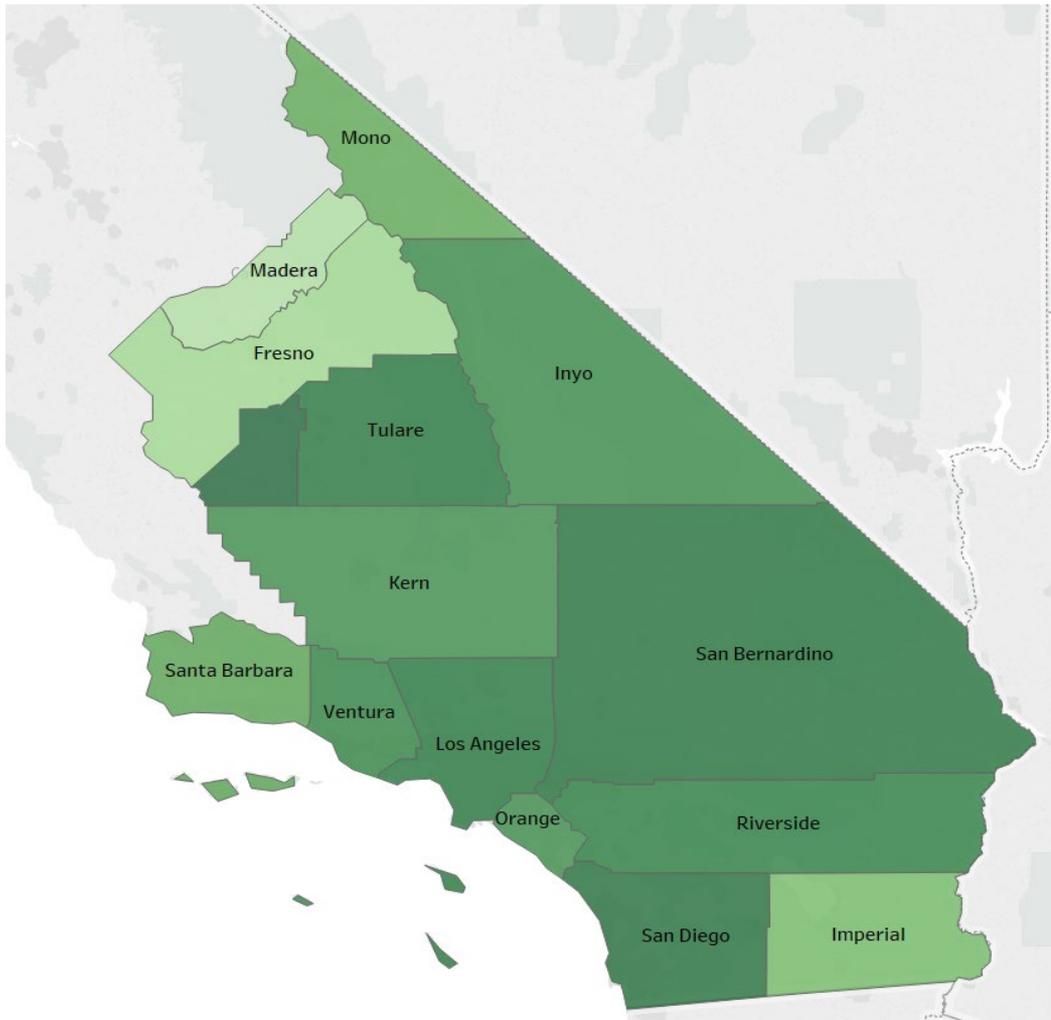
## Counties with Lowest CARE Penetration Rates (2019)



County	Penetration Rate
TRINITY	36%
SIERRA	37%
LASSEN	57%
SAN LUIS OBISPO	61%
MARIN	67%
PLACER	64%
PLUMAS	67%
CALAVERAS	71%
MARIPOSA	74%
HUMBOLDT	75%

# CARE Program *CARE Penetration map*

## SCE



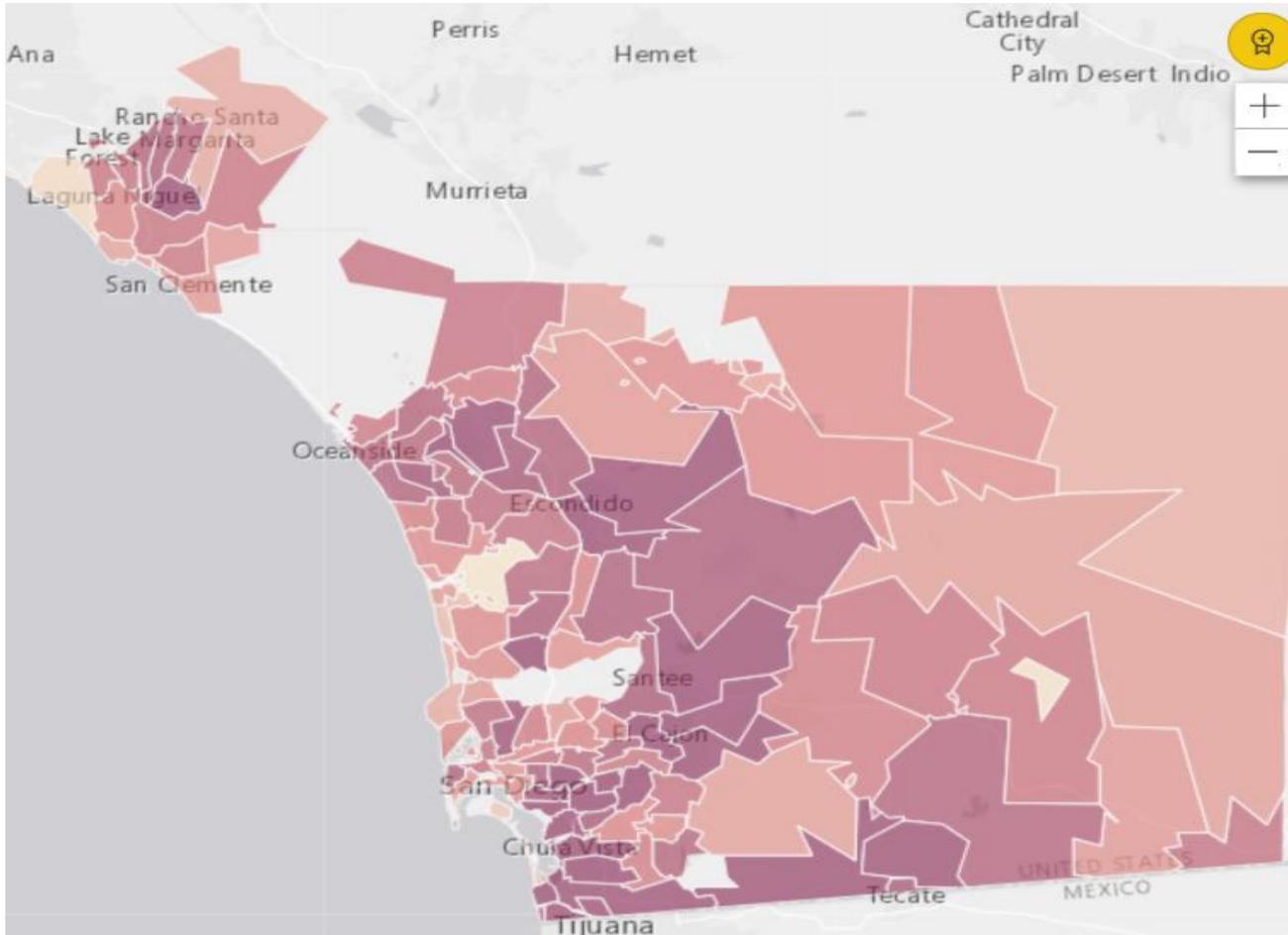
County	Penetration Rate*
Kings	123%
San Bernardino	98%
Tulare	97%
Los Angeles	93%
Riverside	91%
Ventura	81%
Inyo	69%
Orange	75%
Kern	74%
Santa Barbara	52%
Mono	40%
Imperial**	33%
Fresno**	8%
San Diego**	0%
Madera**	0%

\*Represents the penetration rates for all SCE counties effective January 31, 2020.

\*\*Represents counties with less than 1,000 estimated eligible households

# CARE Program *CARE Penetration map*

## SDG&E

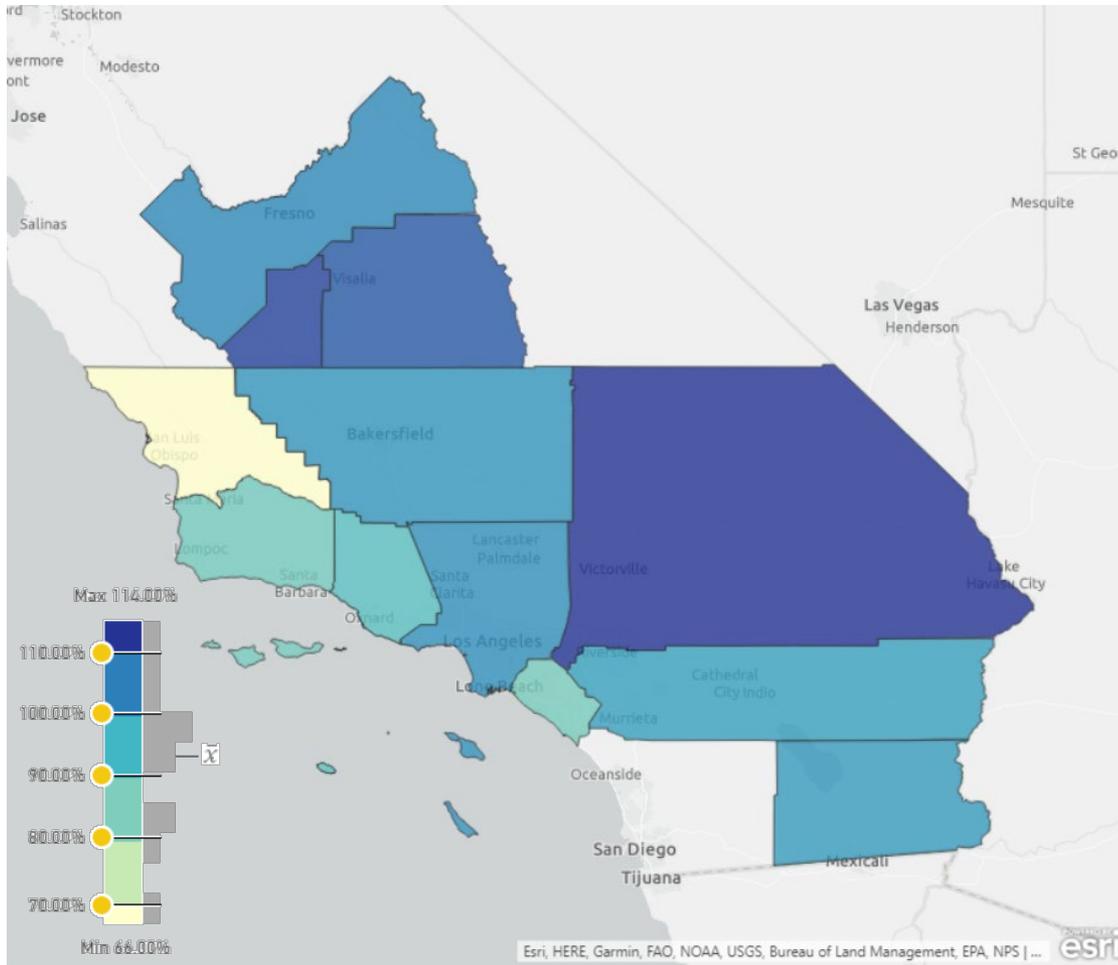


City	Penetration Rate*
Rancho Santa Fe	7.3%
Mount Laguna	10.1%
Laguna Beach	13.4%
Coronado	25.7%
Del Mar	28.8%
Borrego Springs	36.9%
La Jolla	38%
Palomar Mountain	39.1%
Trabuco Canyon	42.1%
Pala	43.2%
Dana Point	44.4%
Jamul	48.2%

\*Cities with the lowest CARE penetration rate.

# CARE Program *CARE Penetration map*

## SoCalGas



County	Penetration Rate *
San Bernardino	115%
Kings	108%
Tulare	105%
Fresno	98%
Los Angeles	97%
Kern	96%
Imperial	95%
Riverside	94%
Ventura	86%
Santa Barbara	82%
Orange	81%
San Luis Obispo	67%

\* 2019 YTD through December 31, 2019, as reported in the IOU ESA-CARE Monthly Report (filed January 21, 2020).

# Energy Savings Assistance Program

PU Code Section 2790 requires the CPUC to provide energy efficiency services to qualifying low-income households. This program provides energy efficiency services such as weather stripping, insulation, and appliance upgrades to help these Californians better manage their energy bills.

## 2019 YTD ESA Program Budget Updates \*

2019 Authorized Program Budgets and YTD Expenditures			
Utility	Authorized 2019 Budget <sup>1</sup>	YTD Expenditures <sup>2</sup>	%
PG&E	\$265,177,815	\$171,334,132	65%
SCE	\$83,272,261	\$87,415,781	105%
SDG&E	\$34,652,791	\$18,198,522	53%
SoCalGas	\$208,099,969	\$109,551,666	53%
<b>Total</b>	<b>\$591,202,836</b>	<b>\$386,540,101</b>	

<sup>1</sup> Authorized funding in Conforming AL Resolutions, Clear Plan Dispositions, and Mid-Cycle Update AL Dispositions, including authorized 2009-2016 unspent funding. This is sum of the amounts shown in the IOU ESA-CARE Monthly Reports, ESA Tables 1 and 1A.

<sup>2</sup> Expenditures are the sum of amounts shown in each IOU's ESA-CARE Monthly Report, ESA Table 1 and Table 1A.

\* 2019 YTD through December 31, 2019, as reported in the IOU ESA-CARE Monthly Report (filed January 21, 2020).



# Energy Savings Assistance Program

## 2019 YTD Energy Savings Targets

2019 Annual Savings for YTD Treatment <sup>1</sup>			Estimated Annual HH Usage for HH Treated YTD <sup>2</sup>		Savings as % of Average HH Usage		Annual Program Savings Target <sup>3</sup>	
Utility	kWh	therms	kWh	therms	kWh	therms	kWh	therms
PG&E	68,952,732 <sup>4</sup>	(470,826) <sup>4</sup>	630,020,160	35,510,227	10.9%	(1.3%)	49,350,000	1,900,000
SCE	46,895,078	N/A	575,834,400	N/A	8.1%	N/A	30,600,000	N/A
SDG&E	3,599,383	32,487	50,752,548	2,686,068	7.1%	1.2%	6,880,000	400,000
SoCalGas	N/A	641,598	N/A	31,362,388	N/A	2.0%	N/A	6,530,000
<b>TOTAL</b>	<b>119,447,193</b>	<b>203,259</b>	<b>1,256,607,108</b>	<b>69,558,683</b>			<b>86,830,000</b>	<b>8,830,000</b>

<sup>1</sup> 2019 through December 31, 2019, as reported in the IOU ESA-CARE Monthly Report (filed January 21, 2020).

<sup>2</sup> Derived from average CARE Customers Usage for PY 2018 (Annual Report CARE Table 9) multiplied by 2019 December homes treated and annualized.

<sup>3</sup> Authorized in ED Dispositions (December 2018 and January 2019) to IOU Mid-Cycle Advice Letter filings.

<sup>4</sup> PG&E's YTD energy savings through December 31 include updates from the ESA 2019 Impact Evaluation. These Energy Savings adjustments were first included in PG&E's July monthly reporting (filed on August 21). As a result, therm savings were revised downward significantly.



# Energy Savings Assistance Program

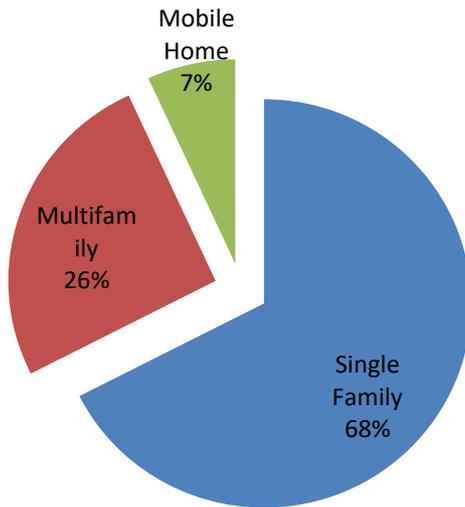
## Top Two Drivers for Energy Savings Shortfalls below Target

IOU	Drivers
PG&E	<ol style="list-style-type: none"> <li>1. PG&amp;E is forecasting to meet ESA's kWh target.</li> <li>2. PG&amp;E is forecasting to not meet ESA's therm target due to (1) the introduction of LED lighting interactive effects, which PG&amp;E indicated in the Mid-Cycle Advice Letter; and (2) transition to using Final Impact Evaluation results beginning with reporting for July 2019. (Final Impact Evaluation results are much lower than the Phase 1 results used in the Mid-Cycle Advice Letter.)</li> </ol>
SCE	<ol style="list-style-type: none"> <li>1. SCE has surpassed the kWh target.</li> <li>2. SCE has treated more homes in 2018 than 2019. However, SCE still does not meet its homes treated target mainly due to difficulty in enrolling first touch customers. These customers have been offered the ESA Program through multiple marketing and outreach activities conducted by SCE and its contractors. These customers have been unresponsive. SCE has been implementing various strategies to close this gap.</li> </ol>
SoCalGas	<ol style="list-style-type: none"> <li>1. Enrollment rates below the original forecast and goals. This is a result of the challenges the program faces in finding and enrolling new, untreated, eligible and willing customers.</li> <li>2. Lower forecast rates of feasibility for some of the program measures.</li> <li>3. The differences between the assumptions used to develop the original targets and those currently being used for reporting.</li> </ol>
SDG&E	<ol style="list-style-type: none"> <li>1. Homes treated number are lower than expected. Challenges with contractor workforce and outreach challenges.</li> <li>2. Lower than forecasted installation rates for certain measures due to feasibility of installation.</li> </ol>

# Energy Savings Assistance Program

PU Code Section 2790 requires the CPUC to provide energy efficiency services to qualifying low-income households. This program provides energy efficiency services such as weather stripping, insulation, and appliance upgrades to help these Californians better manage their energy bills.

## 2019 SW Participation by Type



## 2019 YTD Households Treated

2019 YTD Households Treated <sup>1</sup>						
Utility	Annual Goal	First Touch	Go-Backs	Total	Total as % of 2019 Goal	Total as % of Eligible ESA HH <sup>2</sup>
PG&E	102,237	42,325	63,739	106,064	104%	6.48%
SCE	103,621	74,630	20,770	95,400	92%	6.66%
SDG&E	22,641	6,441	5,340	11,781	52%	3.67%
SoCalGas	182,265	51,475	49,982	101,457	56%	5.32%
<b>Total</b>	<b>410,764</b>	<b>174,871</b>	<b>139,831</b>	<b>314,702</b>		

<sup>1</sup> 2019 through December 31, 2019, as reported in the IOU ESA-CARE Monthly Report (filed January 21, 2020).

<sup>2</sup> Athens estimate of IOU residential customers estimated eligible for ESA at 200% of FPL; updated annually in February.

# Energy Savings Assistance Program

## 2019 MULTIFAMILY UPDATES

**SPOC: All IOUs have SPOC facilitation at this time. SPOC continues to leverage with other utility program offerings.**

- **PG&E:** In 2019 PG&E's SPOC conducted 163 referrals in 6 PG&E customer programs.
- **SCE:** SCE SPOC has visited over 20 customers in Santa Ana, Ventura, Goleta, Victorville, and Rancho Cucamonga to promote MF CAM.
- **SDG&E:** In 2019 SDG&E's SPOC enrolled 28 properties into at least one SDG&E customer program.
- **SoCalGas:** Installation will begin in March to replace 11 boilers for a Palm Desert Project that provides hot water for 384 units (over 1,000 tenants for low-income families). An RFP is underway for four projects in North Hollywood and Van Nuys to replace a boiler at each site. Each sites serves between 14 – 18 units. Future projects include a boiler replacement in Santa Ana and eight water heaters in Alta Loma.

**Common Areas: All IOUs continue implementing their Common Area Measures Initiative Implementation Plans in 2019.**

- **PG&E:** As of 02/11/2020, PG&E has enrolled 1,665 and audited 1639 buildings. First project installation is complete and pending project verification.
- **SCE:** There are 33 projects in progress, 1 completed, and 28 in the pipeline.
- **SDG&E:** In 2019, SDG&E's ESA CAM implementor completed 22 Energy Assessments. Currently, there are 20 properties pending program qualification and there are 26 properties who are actively interested in the program. 24 sites are currently undergoing measure installations and 9 projects have been completed. All ESA CAM activity will be further reported in SDG&E's Annual Report.
- **SoCalGas:** As of December 2019, SoCalGas has completed four CAM projects, impacting approximately 1,600 units and thousands of tenants. These CAM projects have replaced systems ranging from 75-gallon water heaters to 1 million BTU boilers throughout our service territory. The projects completed in 2019, in addition to the projects slated for 2020, represent approximately 25% of the allocated SoCalGas CAM budget.

## ENERGY EDUCATION

The statewide Energy Education Resource Guide has been finalized and the IOUs and SMJU's are in the process of rolling out to Service Providers; the guide is available in English, Spanish, Chinese, Vietnamese, Korean, Hmong, Russian, and Braille.

# Energy Savings Assistance Program



## Tribal Activities

IOU	Federally-Recognized Tribes	Activities
PG&E	51	In October, PG&E completed the focused work with the Yurok tribe. The goal was to gain insights into the barriers to ESA participation. The ESA Contractor had conducted 285 outreach touches to a total list of 110 households and completed 12 assessments. A report from the project facilitator has been submitted for review and a summary PPT document will be shared with CPUC Tribal Liaison. The penetration rate for homes treated was 57 percent at YE 2019 for the estimated number of ESA-eligible customers living on tribal lands in PG&E's service area.
SCE	13	SCE has already met the goal of offering the ESA Program to all tribes in its territory by 2020. However, SCE is still continuing enrollment efforts with interested tribes. For instance, SCE has reached out to Morongo Band of Mission Indians and has set up a referral program with their TANF Office. SCE will also participate in their Earth Day activities.
SoCalGas	20	During 2019, SoCalGas attended 19 events, 12 meetings, and one conference with the local tribal communities. The 2019 events are as listed in the tribal outreach table. During these events, SoCalGas staff present information and provide attendees with Customer Assistance Program information. SoCalGas staff have continued to actively participate in the Inter-Tribal Educational Collaborative (ITEC) monthly meetings.
SDG&E	19	In 2019, SDG&E's ESA CAM implementor completed 22 Energy Assessments. Currently, there are 20 properties pending program qualification and there are 26 properties who are actively interested in the program. 24 sites are currently undergoing measure installations and 9 projects have been completed. All ESA CAM activity will be further reported in SDG&E's Annual Report.
<b>Total</b>	<b>103</b>	



# Energy Savings Assistance Program

## PG&E Tribal Outreach for Low Income Programs

TRIBAL OUTREACH STATUS	In Person	No Response or Materials Only	Non-FR
Berry Creek Rancheria of the Tyme-Maiou Tribe	X NC		
Big Sandy Rancheria of Western Mono Indians of California	X SF		
Cahto Indians of the Laytonville Rancheria	X		
Chicken Ranch Rancheria of Me-Wuk Indians of California		No Response	
Cold Spings Rancheria of Mono Indians	X SF		
Dunlap Band of Mono	X SF		X
Grindstone Rancheria of Wintun-Wailaki Indians		X	
Guidiville Rancheria of California	X NC		
Habematolel Pomo of Upper Lake	X		
Hoopa Valley Tribe	X		
Hopland Band of Pomo Indians	X		
Manchester Band of Pomo Indians	X NC		
Mooretown Rancheria of Maidu Indians	X NC		
North Fork Mono	X SF		X
North Fork Rancheria of Mono Indians	X SF & Web		
Pinoleville Pomo Nation		X	
Redwood Valley Rancheria of Pomo Indians	X		
Robinson Rancheria of Pomo Indians		X	
Round Valley Indian Tribe	X		
Sherwood Valley Rancheria of Pomo Indians	X		
Tuolumne Me-Wuk Tribe	X		
United Auburn Indian Community/Auburn Rancheria	X		
Yurok Tribe	X		

All 11 priority tribes have been contacted.  
12 other tribes have been contacted, of which 2 are non-federally recognized.

NC = Northern Circle Indian Housing Authority

SF = Sierra Tribal Forum

**Priority Tribe**

# Energy Savings Assistance Program

## SCE Tribal Outreach for Low Income Programs

#of Federally Recognized Tribes in SCE Territory	# of Tribes who no longer are in SCE Territory	# of Tribes who Refused/Members not Eligible	# of Tribes enrolled and completed installations	# of Tribes Reached Out to, but no response	# of Tribes Completed Tribal Consultation
<b>13</b>	<b>1</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>6</b>
	Pechanga	Twenty-Nine Palms Agua Caliente San Manuel Band of Mission Indians	Chemehuevi Death Valley Timbisha Shoshone	Soboba Band of Luiseño Indians	Benton Paiute Tribe Bishop Paiute Tribe Bridgeport Paiute Indian Colony Tule River Indian Tribe Colorado River Indian Tribes (CRIT) Morongo Band of Mission Indians

# Energy Savings Assistance Program



## SDG&E Tribal Outreach for Low Income Programs

Association	Start Time	Event Title	Activity	Reach
Ad-Hoc Event	1/25/2019	Rincon Community Preparedness Meeting	Event/Booth	35
SCAIR	2/2/2019	Cuyamaca Pow Wow	Event/Booth	50
SCAIR	3/1/2019	Eblast	Messaging	25
SCTA	3/1/2019	Website	Messaging	300
SCAIR	3/1/2019	Website	Messaging	300
SCAIR	4/1/2019	Eblast	Messaging	25
SCTA	4/1/2019	Website	Messaging	500
SCAIR	4/1/2019	Website	Messaging	800
SCAIR	4/3/2019	Tupe Cultural Night Ballard Center	Event/Booth	15
SCAIR	4/6/2019	Spring Gathering	Event/Booth	60
Ad-Hoc Event	4/6/2019	Unite the Tribe San Pasqual Earth Day Concert	Event/Booth	75
Ad-Hoc Event	4/13/2019	Intertribal Earth Day	Event/Booth	70
SCAIR	4/29/2019	Facebook	Messaging	450
SCAIR	5/1/2019	Career & resource Fair Pala CA	Event/Booth	50
Ad-Hoc Event	5/18/2019	Earth Day	Event/Booth	13
SCAIR	6/14/2019	Men's Wellness Health Fair	Event/Booth	10
SCAIR	7/1/2019	Newsletter	Messaging	115
SCAIR	7/6/2019	All Tribes Sycuan	Event/Booth	200
SCAIR	7/12/2019	Seasonal Family Gathering	Event/Booth	15
SCAIR	8/23/2019	Back to School Night	Event/Booth	120
SCAIR	9/19/2019	Founders Day Open House	Event/Booth	60
SCTA	10/1/2019	Blog	Messaging	500
SCAIR	10/1/2019	Outreach Civic Center	Event/Booth	100
Ad-Hoc Event	10/18/2019	Viejas Wellness Event	Event/Booth	100
SCAIR	10/24/2019	ETSY Entrepreneurship	Event/Booth	32
SCAIR	10/27/2019	Tribal TANF Training	Event/Booth	60
SCAIR	11/5/2019	Grief Education	Event/Booth	30
SCAIR	11/13/2019	Cultivating Strength at SCAIR	Event/Booth	25
SCAIR	11/15/2019	Che Cafe Black Belt Eagle Scout	Event/Booth	50
SCAIR	11/21/2019	Native American Indian food distribution	Event/Booth	150
SCAIR	11/22/2019	SDSU Healing Conference	Event/Booth	100
SCAIR	11/26/2019	Holiday Health Class	Event/Booth	20
SCTA	12/1/2019	Blog	Messaging	600
SCAIR	12/19/2019	Native American Indian food distribution	Event/Booth	160

\*SCTCA – Southern California Tribal Chairmen’s Association

\*SCAIR – Southern California American Indian Resource Center

# Energy Savings Assistance Program



## SoCalGas Tribal Outreach for Low Income Programs

Name	Organizer	Location
<b>College Exploration Day</b>	Inter-Tribal Educational Collaborative	UC Irvine
<b>49th Annual CSU Long Beach Puvungna Pow Wow and Outreach</b>	California State University Long Beach American Indian Studies Program, American Indian Student Council, American Indian Student Services, Division of Student Affairs, Student Life and Development, and Associated Students, Inc.	Long Beach
<b>Native American Festival at Shoreline Village</b>	Shoreline Village	Long Beach
<b>One Mind One Heart One Spirit Conference</b>	San Manuel Band of Mission Indians	Highland
<b>1<sup>st</sup> Annual Native American Peoples Intertribal Pow Wow “Honoring our Elders and Veterans”</b>	Oxnard Powwow Committee / LUCHA / City of Oxnard / Ventura County Supervisor of District 5 Mr. John Zaragoza	Oxnard
<b>38<sup>th</sup> Annual UC Riverside Pow Wow</b>	University of California Riverside Native American Student Programs	Riverside
<b>Strawberry Festival &amp; Pow Wow</b>	Native American United Methodist Church	Anaheim
<b>Redbird’s 18<sup>th</sup> Annual Children of Many Colors Pow Wow</b>	Redbird, Ventura County Community Foundation, Moorpark College, the National Endowment for the arts, and the Moon Family Trust	Moorpark
<b>18<sup>th</sup> Annual Hawaiian Gardens Pow Wow</b>	City of Hawaiian Gardens	Hawaiian Gardens

# Energy Savings Assistance Program



## SoCalGas Tribal Outreach for Low Income Programs

Name	Organizer	Location
<b>American Indian Day 18<sup>th</sup> Annual Community Gathering and Family Picnic</b>	United American Indian Involvement, Inc.	Los Angeles (Griffith Park)
<b>Santa Ynez Pow Wow</b>	Santa Ynez Tribe	Santa Barbara
<b>Morongo Thunder &amp; Lightning Pow Wow</b>	Morongo Band of Mission Indians	Morongo Casino
<b>5th Annual Tejon Indian Tribe Pow Wow</b>	Tejon Tribe and Cal State Bakersfield	Cal State Bakersfield
<b>26th Annual Hart of the West Pow Wow</b>	County of Los Angeles Department of Parks and Recreation, Friends of Hart Park & Museum, Fernandeno Tataviam Band of Mission Indians	Newhall
<b>13th Annual Native American Heritage Month Community Pow Wow</b>	American Indian Community Council	Franklin High School, Los Angeles
<b>Native American Heritage Month Community Pow Wow Event</b>	Los Angeles American Indian Community Council	El Monte
<b>Native American Heritage Event</b>	LA City / County Native American Commission	Downey
<b>Monthly Meetings – Inter-Tribal Educational Collaborative</b>	Inter-Tribal Educational Collaborative (ITEC)	Southern California
<b>16th Annual American Indian Chamber of Commerce of California Expo</b>	American Indian Chamber of Commerce	Agua Caliente



# Energy Division – Requirements for Unspent Funds

**Staff Briefing for the Low Income Oversight Board  
(LIOB) Meeting  
March 6<sup>th</sup>, 2020**

**Energy Division  
California Public Utilities Commission (CPUC)**





## D.12-08-044 allowed the IOUs continued flexibility to:

- Commit funds for expenditure during the next program cycle for long-term projects that required funding beyond the current budget cycle.
- Shift funds from one year to another within budget cycles.
- Shift and “borrow” from the next budget cycle, if approved, to avoid program interruptions.
- Carry over all remaining, unspent funds from program year to program year or budget cycle to budget cycle.

These activities did not require prior approval but utilities were required to track and maintain a clear and concise record of all fund shifting in their compliance reports.





## 2009-2015 Unspent Funds

- Significant unspent funds, from the 2009-2015 ESA Program years, resulted in necessary changes and enhanced reporting, monitoring, and tracking unspent Program funds.
- Unspent funds resulted from:
  - Budget carry over from prior years,
  - Estimates and authorizations that exceeded actual expenditures over time,
    - Overestimates based on the maximum level of program activity possible.
- The size of the carry-over budgets, \$400M combined, raised the question of why funds were not being spent, and whether the program focus or rules should be recalibrated to enable spending to achieve statutory objectives





## D.17-12-009 addressed the accumulated unspent fund balance and:

- Permitted IOUs to use an Advice Letter process consistent with the Fund Shifting Rules adopted for the General Energy Efficiency programs, in lieu of a motion to request a fund shift of carry over funds between their gas and electric departments. (page 363 of modified decision)
- Authorized the use of unspent funds to support the programmatic initiatives (including ESA MF CAM, new measures, etc.) and program rule changes adopted in the decision and approved via conforming or mid-cycle Advice Letters or petition for modification. (page 364)
- Implemented more rigorous monitoring, tracking, and carry-over processes to prevent a similar accumulation of unspent funds from recurring, including quarterly reports to the LIOB. (page 365)





## Current Fund Shifting Rules and Examples

- Funds can be shifted via a Tier 2 Advice Letter (AL), per the clarification language in D.17-12-009 that adopts the AL process in lieu of previous rules that may have required ALJ approval or a motion. (pages 364, 366)
- The General EE fund shift rules, which are outlined in the EE Policy Manual (v5), which require ALs for shifts greater than 15% of an annual amount.
  - For example, if \$15 is being shifted from Statewide Program A (approved budget of \$110) to Statewide Program B (approved budget of \$80), then an AL is needed because either  $\$15/\$110$  or  $\$15/\$85$  is more than 15%.
  - However, D.17-12-009 refers to total ESA budget when trying to determine the denominator for ESA fund shifting.
- If an IOU were requesting to shift an amount equal to 30% of their total ESA budget, then ED could approve 25% (the cap) with the rest going to offset collections. (page 366)





## Going Forward

- The post 2020 guidance document requires the IOUs address the following in their application regarding unspent funds:
  - Discuss unspent funds, and any failure to meet household treatment goals, for each completed year of the prior budget cycle.
  - Discuss how you will more accurately budget upfront for activities and take actions, to mitigate performance shortfalls before the end of the annual period to avoid failing to meet annual performance targets.





## Definitions and Clarifications

- “Committed” funds are committed to a specific contract or customer project
- “Uncommitted” funds are unspent funds that are not committed to existing projects or contracts
- “Unspent funds,” without qualification, refers to all authorized yet unspent funds, whether committed or not





# Joint IOU's Unspent Funds for Energy Savings Assistance Program

Low Income Oversight Board Meeting  
San Jose, CA  
March 6, 2020

# Energy Savings Assistance Program *Unspent/Uncommitted ESA Fund.*

## PG&E Remaining Uncommitted 2009-2016 Unspent Funding

Committed 2017-2020 ESA Unspent Funding			
Year	Authorized Unspent Funding <sup>1</sup>	YTD Expenditures <sup>2</sup>	Remaining Committed Unspent Funding <sup>4</sup>
2017	\$2,377,763	\$2,377,763	\$0
2018	\$18,570,835	\$2,477,114	\$16,093,721
2019	\$43,600,229	\$10,126,094	\$33,474,135
2020	\$59,329,898		\$59,329,898
<b>Total</b>	<b>\$123,878,724</b>	<b>\$14,980,971</b>	<b>\$108,897,753</b>

Remaining Uncommitted 2009-2016 Unspent Funding <sup>3</sup>		
Principal	Interest	Total
\$55,472,295	\$13,687,381	\$69,159,677

<sup>1</sup> The amount of 2009-2016 unspent funds authorized for ESA 2017-2020 in Conforming AL Resolution and Mid-Cycle AL Disposition. These funds are shown in ESA Table 1A of PG&E's Monthly and Annual ESA-CARE Reports.

<sup>2</sup> 2017-2018 ESA expenses from 2017-2018 ESA-CARE Annual Reports, filed May, 1 2018 and 2019. 2019 is YTD through December 31, from ESA-CARE Monthly Report for December, 2019, filed January 21, 2020. These funds are shown in ESA Table 1A of PG&E's Monthly and Annual ESA-CARE Reports.

<sup>3</sup> PG&E's remaining uncommitted unspent 2009-2016 funding will be used to offset collections that would otherwise have been required in this program cycle, as directed by D.17-12-009, OP.137, and will be depleted by 2021. This funding is through December 31, 2019, and includes an average annual interest rate of 2.24%.

<sup>4</sup> Unspent funding at year-end is carried forward to following years in the same cycle.



# Energy Savings Assistance Program *Unspent/Uncommitted ESA Funds*

PY 2017-2020

## SCE Remaining 2009-2016 Unauthorized Unspent/Uncommitted Funds

	Authorized			Spent [3]			Remaining [4]		
	Annual Budget [1]	Unspent-Uncommitted from 2009-2016 [1] [2]	Total	Annual Budget	Unspent-Uncommitted from 2009-2016	Total	Annual Budget	Unspent-Uncommitted 2009-2016	Total
PY 2017	\$ 59,601,019	\$ 11,139,809	\$ 70,740,828	\$ 61,045,978	\$ 74,978	\$ 61,120,956	\$ (1,444,959)	\$ 11,064,831	\$ 9,619,872
PY 2018	\$ 61,919,683	\$ 17,186,772	\$ 79,106,455	\$ 64,849,390	\$ 2,968,328	\$ 67,817,718	\$ (2,929,707)	\$ 14,218,444	\$ 11,288,737
PY 2019	\$ 63,616,662	\$ 19,655,599	\$ 83,272,261	\$ 79,055,243	\$ 11,743,064	\$ 90,798,307	\$ (15,438,581)	\$ 7,912,535	\$ (7,526,046)
PY 2020	\$ 65,067,100	\$ 20,183,403	\$ 85,250,503	\$ -	\$ -	\$ -	\$ 65,067,100	\$ 20,183,403	\$ 85,250,503
<b>Total</b>	<b>\$ 250,204,464</b>	<b>\$ 68,165,583</b>	<b>\$ 318,370,047</b>	<b>\$ 204,950,611</b>	<b>\$ 14,786,370</b>	<b>\$ 219,736,981</b>	<b>\$ 45,253,853</b>	<b>\$ 53,379,213</b>	<b>\$ 98,633,066</b>

[1] Authorized Budget through Resolution E-4885

[2] Authorized Budget through AL 3824-E

[3] Annual spent reflected is through 9/30/2019

[4] Remaining authorized Unspent-Uncommitted thru 2020

SCE does not anticipate having any remaining 2017-2020 Unspent-Uncommitted funds at the end of the cycle

### PY 2009-2016

2009-2016 Unspent-Uncommitted fund as of 1/1/2017	\$ 124,383,309	[a]
Balance from 2009-2016 Authorized to Spend for 2017-2020	\$ 68,165,583	[b]
Balancing Account Interest	\$ 6,181,514	[c]
2009-2016 Remaining Unspent-Uncommitted Fund	\$ 62,399,240	[a]-[b]+[c]
Bridge Funding Budget Proposal Advice Letter 4053-E	\$ 40,926,750	[d]
Remaining unauthorized Unspent-Uncommitted funds	<b>\$ 21,472,490</b>	[a]-[b]+[c]-[d]



# Energy Savings Assistance Program (cont'd) Unspent/Uncommitted ESA Funds

## SDG&E Remaining Unspent Uncommitted Funds

	Total ESA (Table 1 + 1A)		
	Authorized Budget [1]	Spent	Remaining
PY 2017 [2] [3]	\$34,313,691	\$17,996,715	\$16,316,976
PY 2018 [2] [3]	\$33,744,223	\$22,896,182	\$10,848,041
PY 2019 [4]	\$34,652,791	\$18,198,522	\$16,454,269
PY 2020	\$35,509,153	TBD	TBD

	Total ESA (Table 1 + 1A)			
	Revenues Collected in Rates	Interest Earned	Program Year Expenditures	Current Year Unspent, Uncommitted, Collected
PY 2009-16 [5]				\$10,362,880
PY 2017 [6]	\$22,351,356	\$256,588	\$17,485,110	\$5,122,834
PY 2018 [6]	\$31,323,325	\$655,589	\$23,347,010	\$8,631,904
PY 2019 Amortization [2]				(\$20,000,000)

Remaining Unspent Uncommitted Funds

**\$4,117,618**

[1] Commission disposition letter authorized funding in SDG&E Advice Letter 3250-E/2688-G.

[2] Unspent-Uncommitted funds from 2017 and 2018 were used to offset the 2019 ESA revenue requirements for electric (\$10M) and gas (\$10M) customers, as directed by the CPUC (SDG&E Advice Letters 3280-E and 2713-G).

[3] Expenses as reflected on Annual Reports (includes manual adjustments).

[4] Preliminary expenses through 12/31/2019. Subject to be updated in 2019 Annual Report to be filed on May 1, 2020.

[5] SDG&E's unspent/over collected funds at the end of 2016 totaled \$23,322,672. Resolution E-4884 authorized \$12,959,793 to be used in the 2017-2020 budget cycle. Unspent carryover funds from PY2017 and PY2018 were redistributed to PY2019 as authorized in SDG&E Advice Letter 3250-E/2688-G.

[6] Expenses as reflected in balancing accounts (does not include manual adjustments).



# Energy Savings Assistance Program *Unspent/Uncommitted ESA Funds*

## SoCalGas Remaining Unspent Funds

### 2017-2020 ESA Program

	Authorized Annual Budget <sup>[1]</sup>	Spent <sup>[2]</sup>	Unspent <sup>[3]</sup>
PY 2017	\$ 138,130,301	\$ 79,364,204	\$ 58,766,097
PY 2018	\$ 198,805,587	\$ 94,492,552	\$ 104,313,035
PY 2019	\$ 208,099,969	\$ 109,551,666	\$ 98,548,303
PY 2020	\$ 216,861,913	\$ -	
<b>Total</b>	<b>\$ 761,897,770</b>	<b>\$ 283,408,422</b>	<b>\$ 261,627,435</b>

<sup>[1]</sup> Includes 2009-2016 unspent funds authorized in Decision 16-11-022, Midcycle, Conforming AL Resolutions and Clear Plan Dispositions.

<sup>[2]</sup> Annual spend for PY 2017 and 2018. PY 2019 spend amount is year-to-date through December.

<sup>[3]</sup> SoCalGas has no remaining uncommitted funds. SoCalGas plans to spend the authorized 2017-2020 funding including prior cycle funds allocated to the current cycle by December 31, 2020.

Note: SoCalGas' ESA Program budgets are recovered through the Direct Assistance Program Balancing Account (DAPBA), which accrues interest based on the average balance in the account at the 3-month commercial paper rate as indicated in SoCalGas' Commission-approved Preliminary Statement for the DAPBA.

# Energy Savings Assistance Program *Unspent/Uncommitted ESA Funds*

## Top Two Drivers for Unspent Funds

IOU	Drivers
PG&E	<ol style="list-style-type: none"> <li>1. Authorized PY2017-18 (Table 1) Unspent Funds were carried forward to 2019: ESA budget under spent due to not meeting homes treated goals in 2017-2018, and over estimation of measures to be installed. We've onboarded additional contractors and anticipate addressing the delta in homes treated in 2019 and 2020.</li> <li>2. 2009-2016 Unspent Funds committed for ESA 2017-2020 through Conforming and Mid-Cycle Advice Letters (Table 1A): 1. Delayed launch of new measures pending 2018 Mid-Cycle Advice Letter Filing Resolution. 2. Delayed start installing measures for Multi-Family Common Area Measure (CAM) as a result of transitioning to a deemed measures program based on options provided by Energy Division; this spend will shift to 2020.</li> <li>3. Remaining Uncommitted 2009-2016 Unspent Funding: This is being used to offset 2020 collections that would otherwise have been required in this program cycle, per D.17-12-009, OP.137, and will be spent by 2021.</li> </ol>
SCE	<ol style="list-style-type: none"> <li>1. Remaining "first touch" eligible population is much smaller and harder to reach. Mitigation strategies to improve participation rates have been initiated (e.g. adding assessment agencies for HTR customers). Inaccurate assumptions on customers Willingness &amp; Feasible to Participate. Customers have been marketed to, but still choose to not enroll despite the program benefits.</li> <li>2. So far, limited opportunities to leverage with CSD. Current projects have few potential measures that SCE can reimburse CSD for.</li> </ol>
SoCalGas	<ol style="list-style-type: none"> <li>1. Enrollment rates below the original forecast and goals. This is a result of the challenges the program faces in finding and enrolling new, untreated, eligible and willing customers.</li> <li>2. Lower forecast rates of feasibility for some of the program measures.</li> </ol>
SDG&E	<ol style="list-style-type: none"> <li>1. Over estimation of measure to be installed.</li> <li>2. Lower than projected homes were weatherized after receiving the initial treatment.</li> </ol>