



Joint IOU Report of the CARE and ESA Programs

Low Income Oversight Board Meeting
Webex
September 17, 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.

2020 YTD CARE Program Updates *

Authorized 2020 Program Budgets Expenditures				
Utility	2020 Budget	YTD Expenditures	%	YTD Rate Discounts
PG&E	\$17,955,243	\$9,081,093	51%	\$424,572,169
SCE	\$6,579,068	\$3,933,232	60%	\$241,441,092
SDG&E	\$7,320,433	\$3,479,557	48%	\$72,617,572
SoCalGas	\$10,091,122	\$4,072,182	40%	\$91,718,089
Total	\$41,945,866	\$20,566,064		\$830,348,922

2020 YTD Enrollment and Penetration						
Utility	Total Residential Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled	Penetration Rate	Newly Enrolled Customers
PG&E	5,552,167	1,446,418	26%	1,531,467	105%	225,502
SCE	4,464,750	1,332,580	30%	1,289,685	97%	229,715
SDG&E	1,351,487	302,245	23%	326,137	94%	51,216
SoCalGas**	5,649,640	1,675,718	30%	1,699,741	101%	210,890
Total	17,018,044	4,767,961		4,847,030		717,323

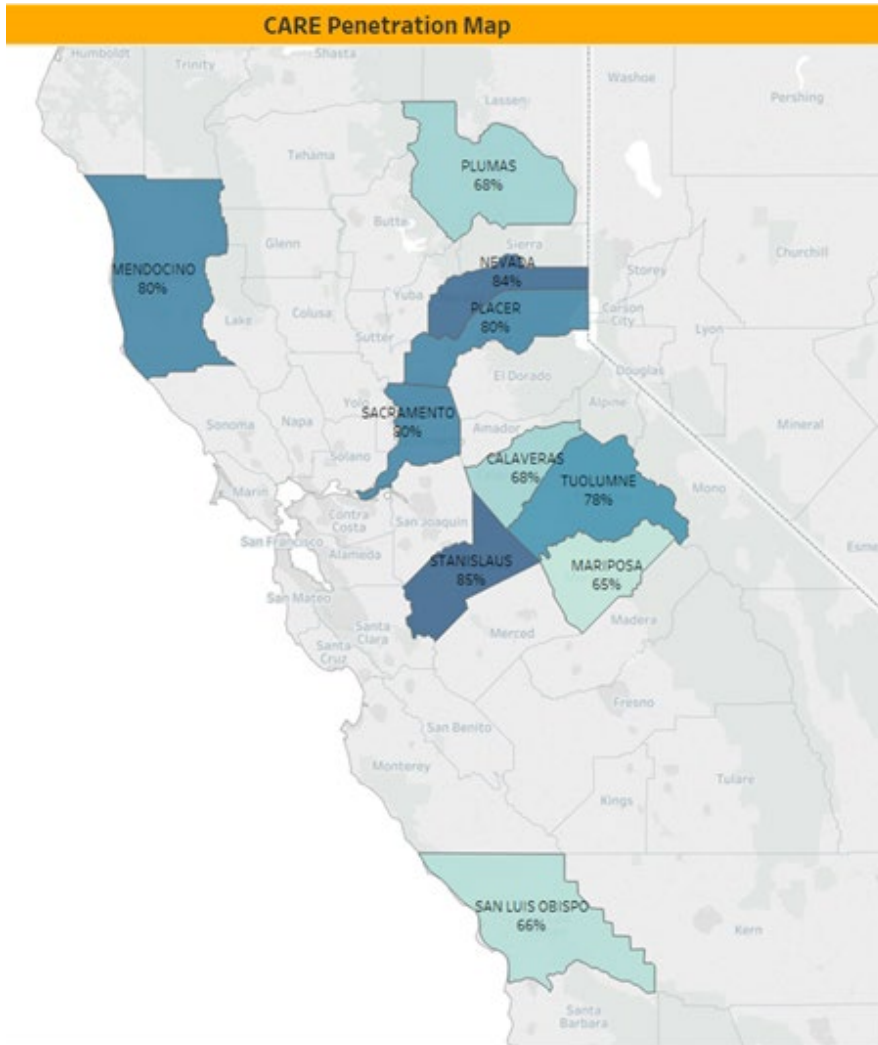
* 2020 YTD through July 31, 2020, as reported in the IOU ESA-CARE Monthly Report filed on August 21, 2020.

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



CARE Program *CARE Penetration map*

PG&E



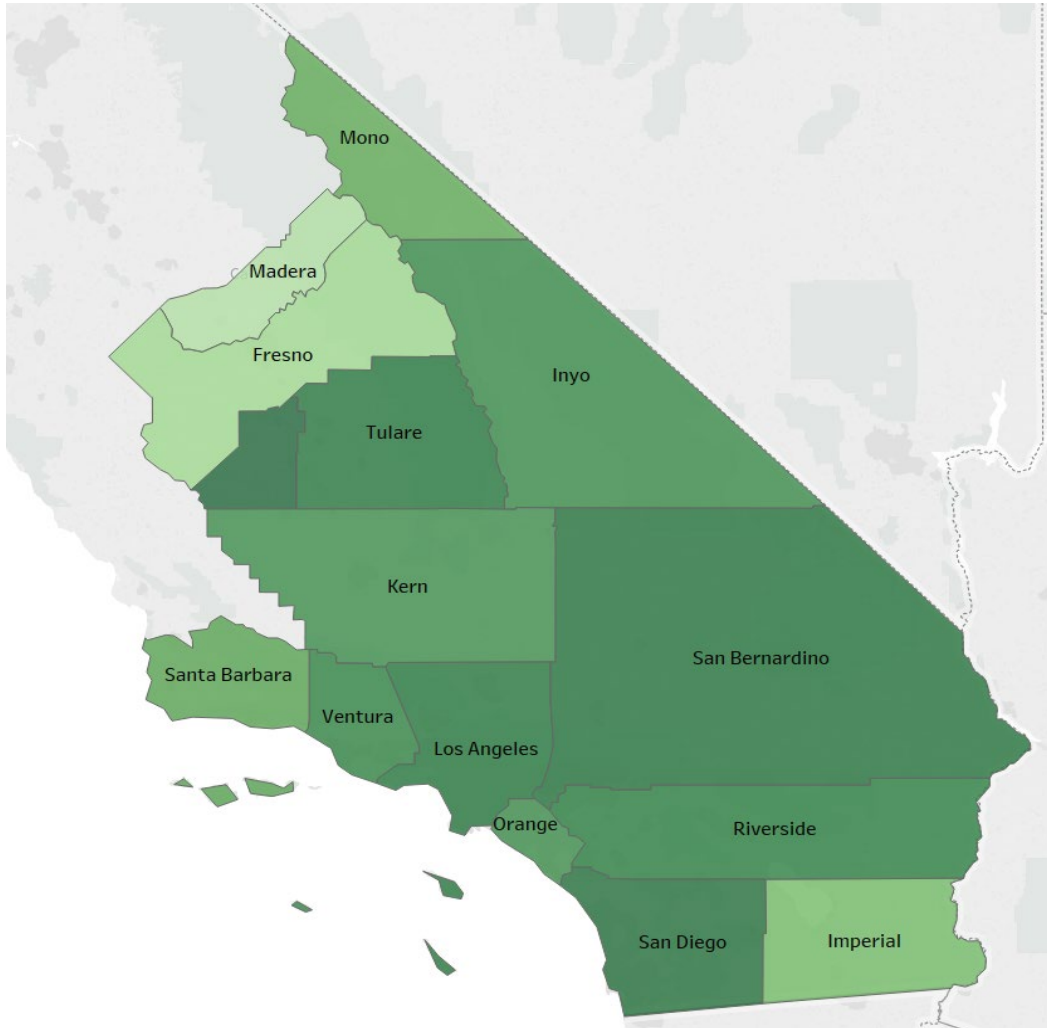
County	Penetration Rate*
MARIPOSA	65%
SAN LUIS OBISPO	66%
CALAVERAS	68%
PLUMAS	68%
TUOLUMNE	78%
PLACER	80%
SACRAMENTO	80%
MENDOCINO	80%
NEVADA	84%
STANISLAUS	85%

*Represents PG&E counties with the lowest penetration rates, as of July 31, 2020.

*Excludes counties with less than 1,000 estimated eligible households

CARE Program *CARE Penetration map*

SCE



County	Penetration Rate*
Kings	129%
San Bernardino	105%
Los Angeles	100%
Tulare	99%
Riverside	99%
Kern	98%
Ventura	87%
Orange	83%
Santa Barbara	55%
Inyo	54%
Mono	45%
Imperial**	34%
Fresno**	8%
San Diego**	0%
Madera**	0%

*Represents the penetration rates for all SCE counties effective July 31, 2021.

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

CARE Program *CARE Penetration map*



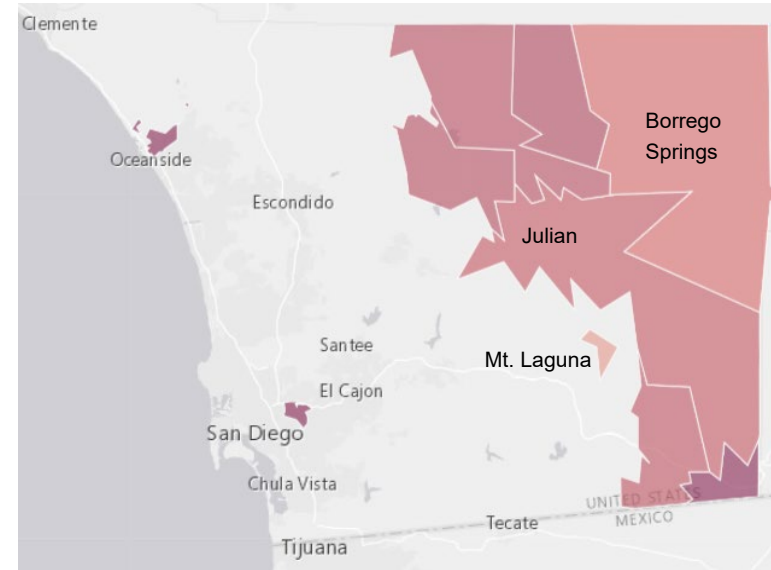
SDG&E

Zip codes with lowest penetration (overall) **

City	Penetration Rate
Rancho Santa Fe	12%
Mount Laguna	13%
Laguna Beach	17%
Coronado	30%
Del Mar	32%
Borrego Springs	44%
La Jolla	48%
Palomar Mountain	48%
Dana Point	52%
Solana Beach	54%
Pala	55%
San Juan Capistrano	57%

Top Areas of Focus*

City	Penetration Rate
Jacumba	89%
Borrego Springs	44%
Boulevard	67%
Santa Ysabel	65%
Ranchita	77%
Warner Springs	69%
Julian	57%
Mount Laguna	13%

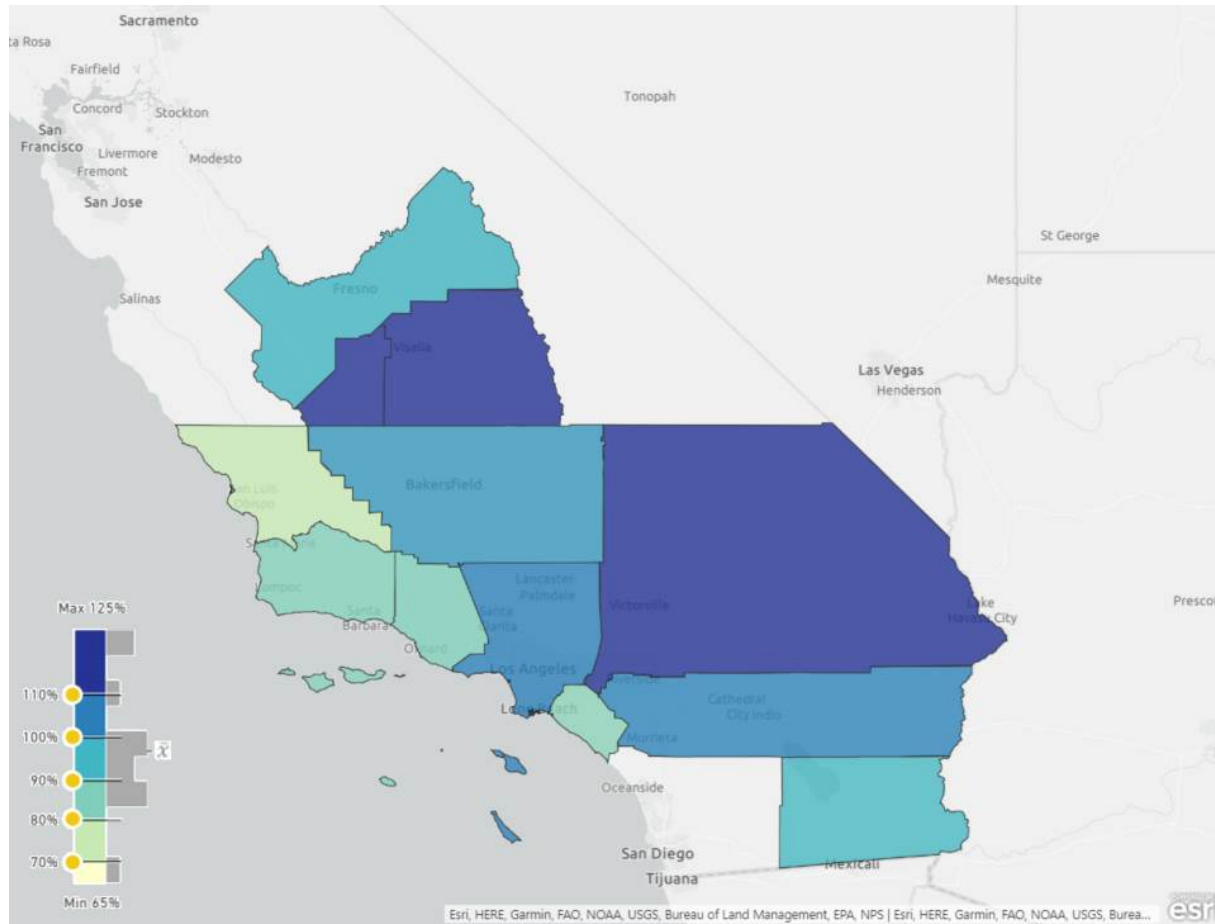


* SDG&E focuses on cities where the percent of the total eligible population is above 50%, and CARE penetration is below 90%.

** Note: Cities with the lowest penetration also have the smallest populations: Mount Laguna – 57; Julian – 1,502; Borrego Springs – 3,429; TOTAL 4,988

CARE Program *CARE Penetration map*

SoCalGas



County	Penetration Rate *
San Bernardino	124%
Kings	128%
Tulare	111%
Fresno	95%
Los Angeles	102%
Kern	98%
Imperial	94%
Riverside	101%
Ventura	93%
Santa Barbara	90%
Orange	89%
San Luis Obispo	67%

* 2020 YTD through July 31, 2020, as reported in the IOU ESA-CARE Monthly Report (filed August 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.

2020 YTD ESA Program Budget Updates *

2020 Authorized Program Budgets and YTD Expenditures			
Utility	Authorized 2020 Budget ¹	YTD Expenditures ²	%
PG&E	\$338,612,853	\$71,405,519	21%
SCE	\$65,067,100	\$28,583,879	53%
SDG&E	\$35,509,153	\$8,610,628	27%
SoCalGas	\$216,861,913	\$58,284,934	27%
Total	\$656,051,019	\$163,410,387	27%

¹ 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.

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

* 2020 YTD through July 31, 2020, as reported in the IOU ESA-CARE Monthly Report (filed August 21, 2020).



Energy Savings Assistance Program

2020 YTD Energy Savings Targets

2020 Annual Savings for YTD Treatment ¹			Estimated Annual HH Usage for HH Treated YTD ²		Savings as % of Average HH Usage		Annual Program Savings Target ³	
Utility	kWh	therms	kWh	therms	kWh	therms	kWh	therms
PG&E	27,969,089	(74,252)	254,938,188	14,686,094	11%	-0.5%	51,820,000	1,900,000
SCE	15,446,731	N/A	17,729,700	N/A	87.1%	N/A	33,920,000	N/A
SDG&E	518,296	13,949	19,756,800	1,209,600	2.6%	1.2%	7,220,000	420,000
SoCalGas	N/A	259,549	N/A	14,846,106	N/A	1.8%	N/A	6,530,000
TOTAL	43,934,116	199,246	292,424,688	30,741,800			92,960,000	8,850,000

¹ 2020 through July 31, 2020, as reported in the IOU ESA-CARE Monthly Report (filed August 21, 2020).

² Derived from average CARE Customers Usage for PY 2019 (Annual Report CARE Table 9) multiplied by 2020 April homes treated and annualized.

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



Energy Savings Assistance Program

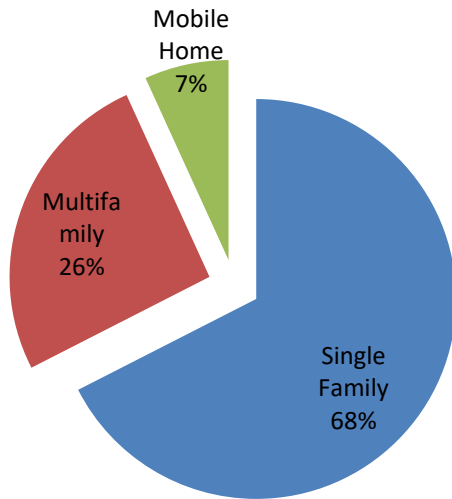
Top Two Drivers for Energy Savings Shortfalls below Target

IOU	Drivers
PG&E	<ol style="list-style-type: none">1. PG&E's ESA Program was on pause for in excess of two months due to the COVID-19 pandemic. Barring something unforeseen, it will be a challenge to meet this year's homes treated goal.2. PG&E is forecasting to not meet ESA's therm target due to (1) the introduction of LED lighting interactive effects, which PG&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.)
SCE	<ol style="list-style-type: none">1. Discounting recent restrictions from the COVID-19 pandemic, SCE would surpass energy savings targets.2. Enrollment rates are still below Pre-COVID-19 levels. Marketing campaigns have resumed but is still limited.
SoCalGas	<ol style="list-style-type: none">1. Enrollment rates are below original forecast and goals. This is a result of the impacts of COVID-19 including challenges ramping up after a two and a half month suspension of program activities.2. Lower therm savings per unit installed, compared with the assumptions used to develop the original savings targets.
SDG&E	<ol style="list-style-type: none">1. The Impact Evaluation has lowered saving values for program measures, making it challenging to meet program savings targets.2. COVID-19 Pandemic suspended ended on May 29, 2020. The full extent of the pandemic's impacts continues to be difficult to predict. SDG&E anticipates additional challenges towards year-end when both the flu season and COVID-19 are impacting customers apprehension for services.

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.

2020 SW Participation by Type



2020 YTD Households Treated

2020 YTD Households Treated ¹						
Utility	Annual Goal	First Touch	Go-Backs	Total	Total as % of 2019 Goal	Total as % of Eligible ESA HH ²
PG&E	104,222	14,454	28,639	43,093	41%	2.68%
SCE	113,612	22,233	6,017	28,250	25%	1.97%
SDG&E	23,761	2,128	2,672	4,800	20%	1.58%
SoCalGas	191,186	29,505	18,522	48,027	25%	2.53%
Total	432,781	54,355	44,733	99,088		

¹ 2020 through July 31, 2020, as reported in the IOU ESA-CARE Monthly Report (filed August 21, 2020).

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



Energy Savings Assistance Program

2020 MULTIFAMILY UPDATES

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

- **PG&E:** To date PG&E's SPOC conducted 243 referrals across PG&E and non PG&E multifamily programs.
- **SCE:** Implementing other outreach strategies since SCE SPOC face-to-face outreach is limited.
- **SDG&E:** Through July 2020, SDG&E's SPOC facilitated the enrollment of 25 properties into at least one SDG&E customer program.
- **SoCalGas:** Since the program resumed on June 1, 2020, ESA CAM has been building the pipeline for common area projects. SoCalGas currently has thirteen active projects that involve the replacement of water heaters and boilers. Since June, SoCalGas has completed one project and has six projects beginning the construction/install phase.

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

- **PG&E:** As of 08/10/2020, PG&E has enrolled 1,882 and audited 1,800 buildings. Upon reaching our enrollment goal, PG&E opened it's 2021 program waitlist. PG&E successfully completed and paid two ESA CAM projects in Q3.
- **SCE:** Deed Restricted: In progress – 23 Whole Building, 8 In Unit; Completed – 5 Common Area, Market Rate: In progress – 25 In-Unit.
- **SDG&E:** As of July, SDG&E's ESA CAM implementor has completed 25 Energy Assessments with another 15 currently under way in the 2020 program year. Additionally, 32 properties have been completed with measure installations and another 16 properties are currently in different stages of the installation phase.
- **SoCalGas:** SoCalGas anticipates to complete between 10 – 15 projects by year end. Based on this forecast, approximately \$1.9 million will be spent to provide improved health, safety and comfort to low-income tenants.

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	PG&E has completed outreach to all Federally Recognized Tribes. See status in following table. An email was sent to all Tribes in June emphasizing the customer protections put in place due to COVID as well as promoting CARE and other assistance programs. Only one tribe (Greenville) requested more information. Tribes targeted for ESA services have also requested documentation of safety protocols regarding ESA contractors. This information should help overcome concerns about having contractors come onto the reservations.
SCE	13	SCE has met the goal of offering the ESA Program to all tribes in SCE service territory by 2020. However, SCE is continuing enrollment efforts with interested tribes, offering virtual enrollments.
SoCalGas	20	Due to COVID-19 many events have been cancelled, postponed or made virtual. In 2020, SoCalGas attended zero events in the second quarter. Community Based Organizations and SoCalGas Customer Assistance Outreach Staff continue to actively participate in outreach efforts via virtual means as listed below. Since last report, Walking Shield, an organization that provides assistance to American Indian families, was onboarded as a community partner to assist in building awareness and enrollment in SoCalGas' Customer Assistance Programs. Attended and cancelled events are listed in the table below for 2020 through July 31.
SDG&E	19	Since January of 2020, SDG&E has attended eight tribal events reaching over 500 people. In late March, because of COVID-19 all in-person tribal related events have been canceled. The Tribal partners of our Energy Solutions Partner Network have, however, continued to share SDG&E messaging via social media and email; overall, 26 messages have been shared reaching over 13,000 people.
Total	103	



Energy Savings Assistance Program

PG&E Tribal Outreach for Low Income Programs

# of Federally Recognized Tribes	# of Tribes contacted, three email attempts, no response.	# of Tribes requested materials	# of Tribes completed Tribal Consultation	# of Non-Federally Recognized Tribes in communications	# of Tribes involved in focused Project on Tribal Lands
51	24	6	21	2	4
All tribes have been contacted and offered consultations	Big Lagoon Blue Lake Rancheria Chicken Ranch Cloverdale Colusa Rancheria Cortina Rancheria Dry Creek Enterprise Rancheria Jackson Rancheria Middletown Paskenta Picayune Pit River Redding Rancheria Rohnerville Rancheria Rumsey Santa Rosa Rancheria Santa Ynez Scotts Valley Shingle Springs Stewarts Point Sulphur Bank Table Mountain Trinidad	Big Valley Rancheria Greenville Rancheria Grindstone Rancheria Mechoopda Pinoleville Pomo Nation Robinson Rancheria	Berry Creek Big Sandy Cahto of Laytonville Cold Springs Coyote Valley Guidiville Rancheria Upper Lake Hoopa Valley Hopland Band of Pomo Ione Band of Miwok Karuk Manchester Point Mooretown Rancheria North Fork Rancheria Redwood Valley Round Valley Sherwood Valley Table Bluff Tuolumne Me-Wuk United Auburn Rancheria Yurok	Dunlop Band of Mono North Fork Mono	Yurok (complete) Hoopa (on hold) Round Valley Sherwood Valley

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
13	1	3	2	1	6
	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 Social Media Outreach for Low Income Programs

Association	Date	Activity Title	Activity	Reach
SCAIR	1/1/2020	Website - Winter Energy Saving Tips	Monthly Messaging	500
SCAIR	1/1/2020	Eblast	Monthly Messaging	25
SCTCA	1/1/2020	Website - All	Monthly Messaging	650
SCAIR	2/1/2020	Eblast	Monthly Messaging	25
SCAIR	2/1/2020	Website - SDG&E's Weather Station Network Has Expanded	Monthly Messaging	150
SCTCA	2/1/2020	Website - All (English and Spanish)	Monthly Messaging	200
SCAIR	2/3/2020	Facebook - SDG&E's Weather Station Network Has Expanded	Monthly Messaging	532
SCAIR	2/3/2020	Facebook - Ways to Save Energy at Home This Winter	Monthly Messaging	532
SCAIR	3/1/2020	Blog - Instant Water Heater Updates	Monthly Messaging	150
SCAIR	3/2/2020	Facebook - Rebates	Monthly Messaging	558
SCAIR	4/1/2020	Monthly Message	Monthly Messaging	40
SCAIR	4/1/2020	Monthly Message	Monthly Messaging	40
SCAIR	4/1/2020	Website - COVID-19	Monthly Messaging	250
SCTCA	4/1/2020	Website - COVID-19	Monthly Messaging	200
SCAIR	4/29/2020	Facebook - COVID-19	Monthly Messaging	569
SCAIR	5/1/2020	Blog - COVID Assistance	Monthly Messaging	50
SCAIR	5/1/2020	E-blast	Monthly Messaging	35
SCTCA	5/1/2020	Blog - All	Monthly Messaging	5,000
SCAIR	5/26/2020	Facebook - COVID Assistance	Monthly Messaging	593
SCAIR	6/1/2020	Blog - Summer Energy Tips	Monthly Messaging	250
SCTCA	6/1/2020	Blog - All (English/Spanish)	Monthly Messaging	575
SCAIR	6/16/2020	Facebook - Summer Energy Tips	Monthly Messaging	3
SCAIR	7/1/2020	Website - Lifeline & LIHEAP	Monthly Messaging	500
SCTCA	7/1/2020	Website - All (English & Spanish)	Monthly Messaging	1,000
SCAIR	7/7/2020	Facebook - Assistance Programs	Monthly Messaging	604
SCAIR	7/21/2020	Facebook - CA Lifeline	Monthly Messaging	604

*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	Notes
6th Annual College Exploration Day: Inter-Tribal Educational Collaborative	Inter-Tribal Educational Collaborative	USC	
Wild Horse Pow Wow	Wildhorse Native American Association	Lawndale	
Monthly Meetings – Inter-Tribal Educational Collaborative	Inter-Tribal Educational Collaborative (ITEC)	Southern California	
50 th Annual CSU Long Beach Puvungna Pow Wow and Outreach	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	Cancelled due to COVID-19
1 st Annual Spring Spotlight	Twenty-Nine Palms Band of Mission Indians	Coachella	Cancelled due to COVID-19
University of Redlands Pow Wow	University of Redlands Native Student Programs	Redlands	Cancelled due to COVID-19
One Mind One Heart One Spirit Conference	San Manuel Band of Mission Indians	Highland	Cancelled due to COVID-19
Chumash Day Native American Powwow & Intertribal Gathering	City of Malibu	Malibu	Cancelled due to COVID-19
1st Annual H.D. Intertribal Gathering of Indigenous People	Indigenous Embrace	Hesperia	Cancelled due to COVID-19
Rebird's 19th Annual Children of Many Colors Pow Wow	Redbird	Moorpark	Cancelled/postponed due to COVID-19
Walking Shield (CBO) One on One Phone and Virtual Meetings	Walking Shield	Phone/Zoom	Active CBO Outreach
Walking Shield (CBO) Email Outreach	Walking Shield	Email	Active CBO Outreach
Walking Shield (CBO) Social Media Outreach	Walking Shield	Social Media	Active CBO Outreach