



# Joint IOU Report of the CARE and ESA Programs

Low Income Oversight Board Meeting  
Hanford, CA  
December 10, 2019

# 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	\$8,838,114	47%	\$505,416,188
SCE	\$6,791,638	\$4,677,631	69%	\$280,407,038
SDG&E	\$7,227,114	\$4,437,219	61%	\$88,467,137
SoCalGas	\$10,091,122	\$4,977,712	49%	\$99,225,073
<b>Total</b>	<b>\$42,793,655</b>	<b>\$22,930,676</b>		<b>\$973,515,436</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%	1,383,495	96%	180,775
SCE	4,432,454	1,337,092	30%	1,177,046	88%	182,635
SDG&E	1,339,676	319,125	24%	296,127	93%	57,806
SoCalGas**	5,619,786	1,683,537	30%	1,601,822	95%	229,150
<b>Total</b>	<b>16,899,262</b>	<b>4,786,168</b>		<b>4,458,490</b>		<b>650,366</b>

\* 2019 YTD through September 30, 2019, as reported in the IOU ESA-CARE Monthly Report (filed October 21, 2019).

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



# CARE Program *CARE Penetration map*

**PG&E**

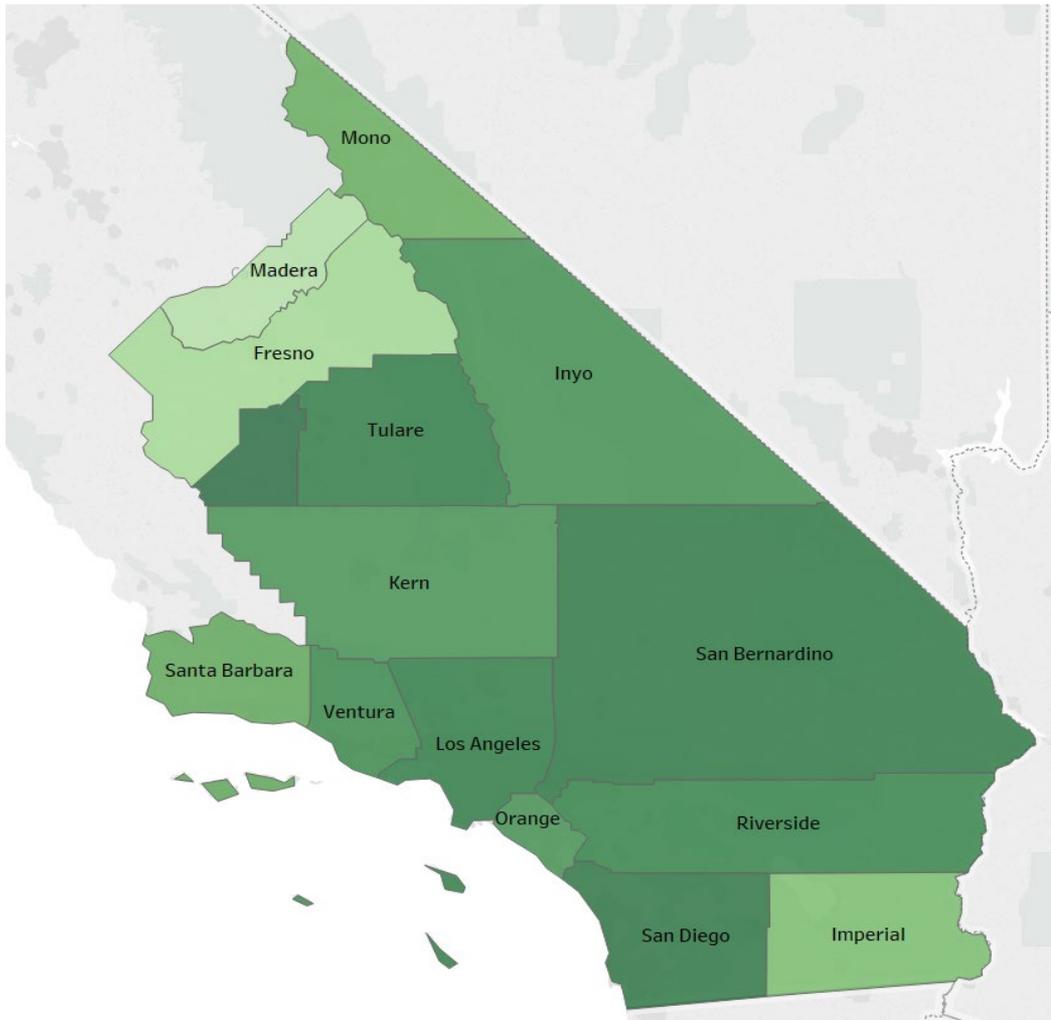
## Counties with Lowest CARE Penetration Rates (2019)



County	Penetration Rate
TRINITY	36%
SIERRA	36%
LASSEN	56%
SAN LUIS OBISPO	61%
MARIN	66%
PLACER	66%
PLUMAS	67%
CALAVERAS	71%
MARIPOSA	74%
HUMBOLDT	74%

# CARE Program *CARE Penetration map*

## SCE

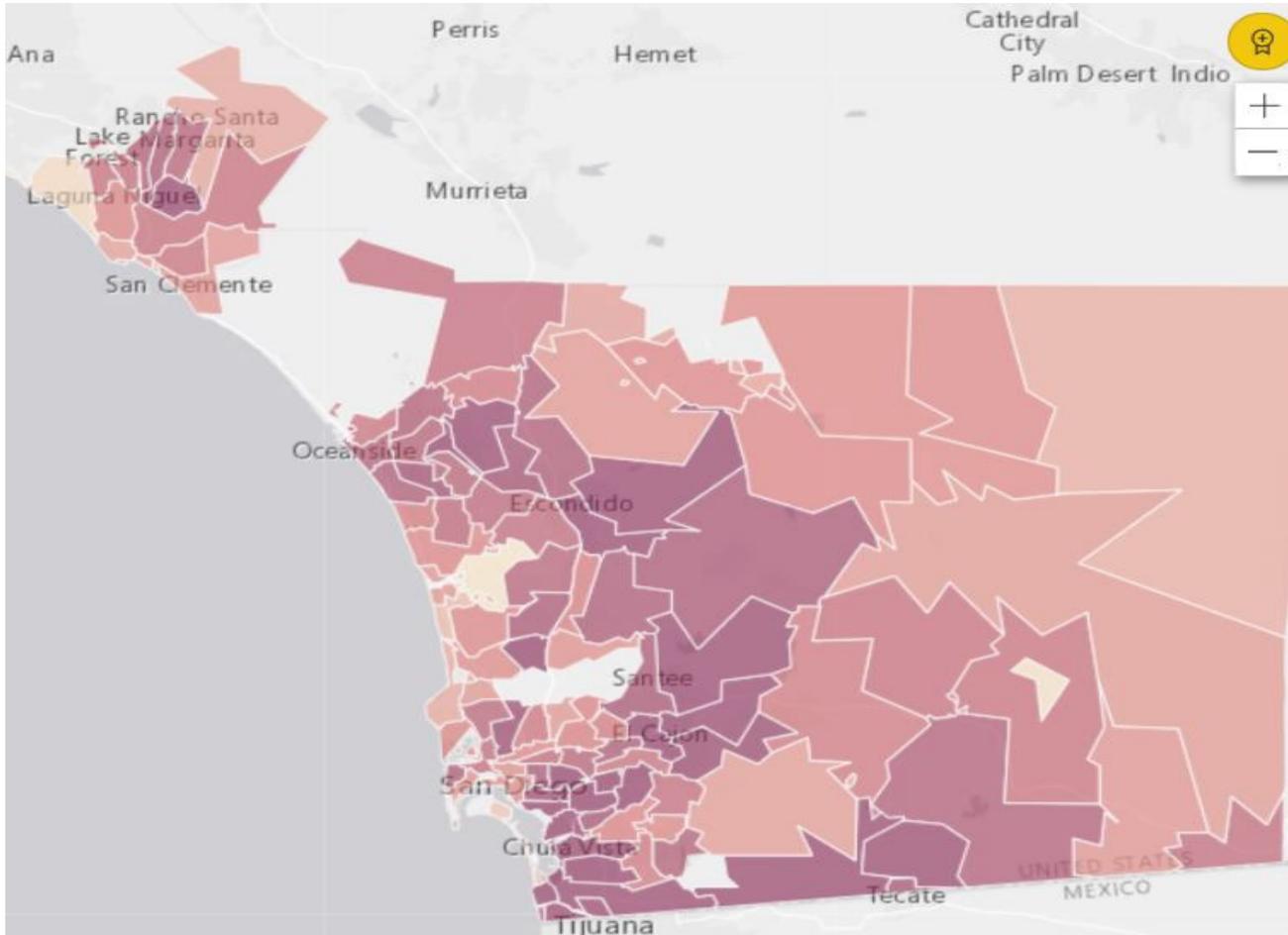


County	Penetration Rate*
Kings	107%
San Bernardino	99%
Tulare	94%
Los Angeles	93%
Riverside	89%
Ventura	81%
Inyo	75%
Orange	75%
Santa Barbara	52%
Mono	47%
Imperial*	36%
Kern	29%
Fresno*	8%
San Diego	0%
Madera*	0%

\* Represents the penetration rates for all SCE counties effective September 30, 2019.

# CARE Program *CARE Penetration map*

## SDG&E

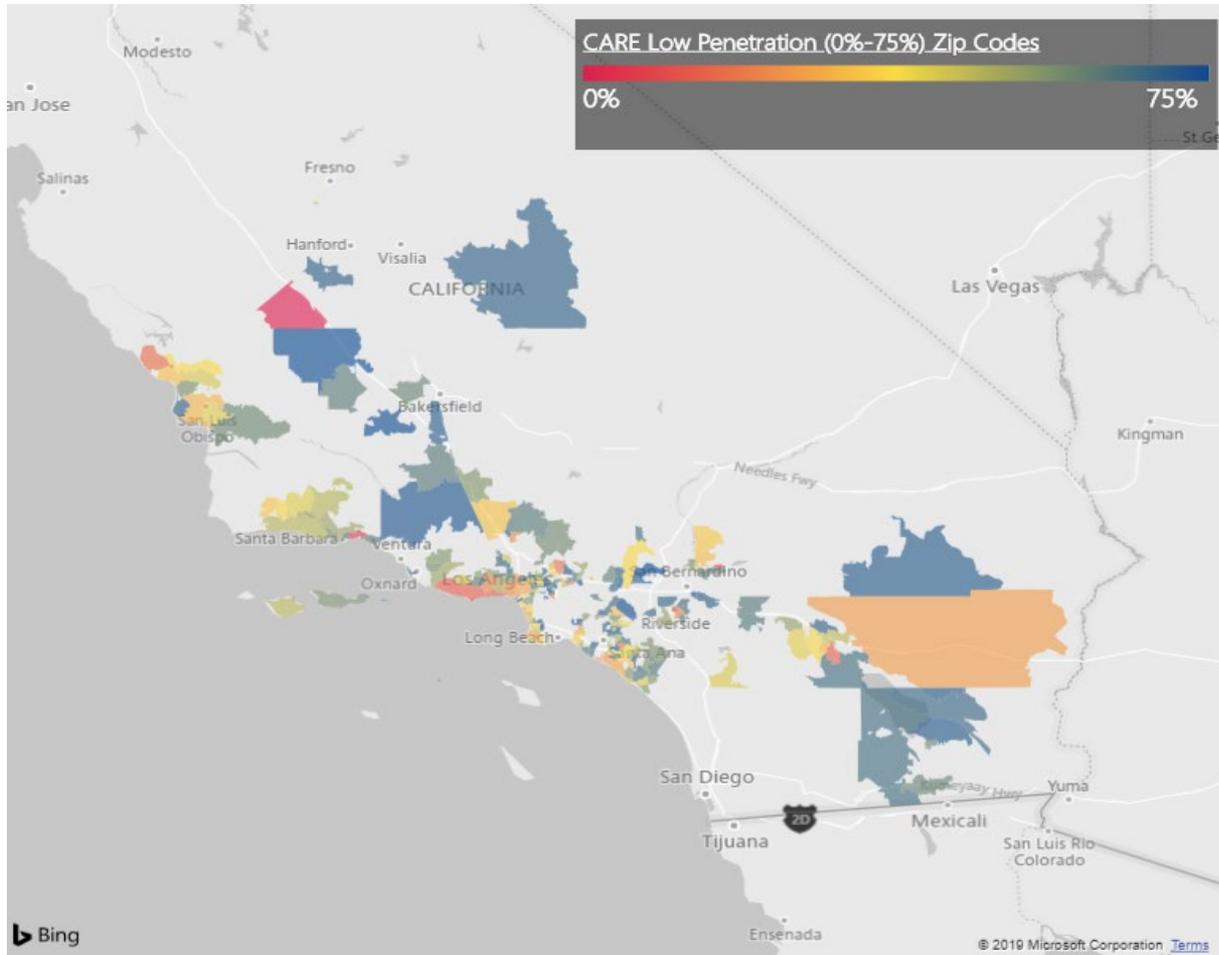


City	Penetration Rate*
Rancho Santa Fe	7.3%
Mount Laguna	10.1%
Laguna Beach	13.4%
Coronado	25.7%
Del Mar	28.8%
Borrego Springs	36.9%
La Jolla	38%
Palomar Mountain	39.1%
Trabuco Canyon	42.1%
Pala	43.2%
Dana Point	44.4%
Jamul	48.2%

\*Cities with the lowest CARE penetration rate.

# CARE Program *CARE Penetration map*

## SoCalGas



County	Penetration Rate *
Fresno	99%
Imperial	95%
Kern	95%
Kings	108%
Los Angeles	97%
Orange	80%
Riverside	94%
San Bernardino	112%
San Luis Obispo	68%
Santa Barbara	82%
Tulare	105%
Ventura	85%

\* 2019 YTD through September 30, 2019, as reported in the IOU ESA-CARE Monthly Report (filed October 21, 2019).

# 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	\$122,382,408	46%
SCE	\$83,272,311	\$67,722,074	81%
SDG&E	\$34,652,791	\$13,541,011	39%
SoCalGas	\$208,099,969	\$77,551,774	37%
<b>Total</b>	<b>\$591,202,886</b>	<b>\$281,197,267</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 September 30, 2019, as reported in the IOU ESA-CARE Monthly Report (filed October 21, 2019).



# 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	49,001,646 <sup>4</sup>	(308,084) <sup>4</sup>	457,837,380	25,805,380	10.7%	(1.2%)	49,350,000	1,900,000
SCE	40,747,318	N/A	422,664,864	N/A	9.6%	N/A	36,500,000	N/A
SDG&E	2,782,175	21,371	36,630,924	1,938,684	8%	0.10%	6,880,000	400,000
SoCalGas	N/A	410,048	N/A	20,410,575	N/A	2.0%	N/A	6,530,000
<b>TOTAL</b>	<b>92,531,139</b>	<b>123,335</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>92,730,000</b>	<b>8,830,000</b>

<sup>1</sup> 2019 through September 30, 2019, as reported in the IOU ESA-CARE Monthly Report (filed October 21, 2019).

<sup>2</sup> Derived from average CARE Customers Usage for PY 2018 (Annual Report CARE Table 9) multiplied by 2019 September 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 September 30 include updates from the ESA 2019 Impact Evaluation. These Energy Savings adjustments were 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

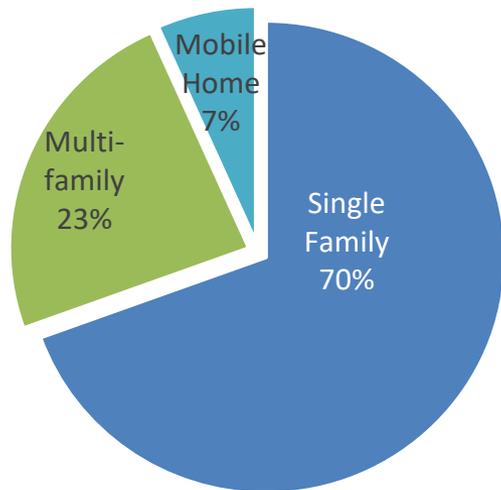
## Top Two Drivers for Energy Savings Shortfalls below Target

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. Currently on target to meet energy savings goals. However, Homes Treated goals remain in jeopardy due to fewer customers willing and eligible to participate. Program is in last years of cycle, and most customers have already participated or are unwilling to participate regardless of efforts.</li><li>2. Eligible customers are non-responsive to outreach efforts. Other ways of reaching out to customers including propensity modeling for direct marketing and outbound calling efforts are being utilized.</li></ol>
SoCalGas	<ol style="list-style-type: none"><li>1. Penetration 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. Also, 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	31,833	45,244	77,077	75%	4.71%
SCE	98,953	56,458	13,566	70,024	81%	4.88%
SDG&E	22,641	4,399	4,104	8,503	38%	1.06%
SoCalGas	182,265	30,668	35,360	66,028	36%	3.46%
<b>Total</b>	<b>403,117</b>	<b>123,358</b>	<b>98,274</b>	<b>221,632</b>		

<sup>1</sup> 2019 through September 30, 2019, as reported in the IOU ESA-CARE Monthly Report (filed October 21, 2019).

<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 enrolled 41 properties in 7 PG&E customer programs.
- **SCE:** SCE streamlined process to be able to have paperless enrollment, added another SPOC to augment outreach activities, and sent communications to 11 local government partnership contacts to provide MF CAM information.
- **SDG&E:** In 2019 SDG&E's SPOC enrolled 21 properties into at least one SDG&E customer program.
- **SoCalGas:** Is currently in the RFP stage for a property in Palm Desert to replace 11 boilers that provide hot water for 384 units (over 1,000 tenants for low-income families). Additional, SoCalGas is evaluating a small project in Riverside that has two boilers and serves 102 senior units.

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

- **PG&E:** As of 11/19/2019, PG&E has enrolled 1,099 and audited 895 buildings. First project is forecasted to be completed in October.
- **SCE:** As of 10/31/19, SCE had 3 new projects in its immediate pipeline; Our SPOC team is working with MF CAM Service Providers to secure all the necessary paperwork to begin work on these projects. SCE MF CAM Service Providers are indicating that 12 of the 18 current active jobs should complete and bill before December 31, 2019.
- **SDG&E:** As of September 2019, SDG&E's ESA CAM implementor has completed 12 Energy Assessments since the inception of the program. 4 Energy Assessments are pending completion with 15 more in the queue. 7 sites are currently undergoing measure installations and 5 projects have been completed and are awaiting invoicing.
- **SoCalGas:** As of September 2019, SoCalGas has completed three CAM projects. The 1,100 unit project in Los Angeles was completed in October, 2019. This was celebrated with a ceremony that hosted guests from the CPUC, Los Angeles Mayor's Office, Los Angeles Department of Water & Power, SoCalGas, Retirement Housing Foundations, along with vendors, guests and local media. The 358 unit project in Rancho Cucamonga, along with a 160 unit project in Corona to replace twelve 75-gallon, 76k BTU water heaters was also completed. These projects, in addition to the completed project in 2018, represent approximately 17% of the allocated 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	<p>In addition to outreach and communication with the 11 priority tribes, PG&amp;E has had contact with 12 others, bringing the total outreach to 23 tribal communities of which 19 were federally recognized and 2 that were not. In October, PG&amp;E completed the focused work with the Yurok tribe. The goal of this work was to gain insights into the barriers to ESA participation. At the end of October, the ESA Contractor had conducted 284 outreach touches to a total list of 110 households. The Contractor completed 12 assessments. Full reports from the focused work, customized outreach and completed assessments will be ready in December 2019.</p> <p>The penetration rate for homes treated reached 57 percent at the end of September 2019 for the estimated number of ESA-eligible customers living on tribal lands in PG&amp;E's service area. The penetration rate is updated every quarter.</p>
SCE	12	<p>Utu UtuGwaitu/ Benton Paiute Tribal members assessment scheduling is still pending. Contact has been made with Morongo and the owner's authorization has been routed for signature.</p>
SoCalGas	20	<p>SoCalGas attended the following events: the Redbird's 18th Annual Children of Many Color Pow Wow in Moorpark, the 18th Annual Hawaiian Gardens Pow Wow American Indian Day, the 18th Annual Community Gathering in Griffith Park, the Santa Ynez Pow Wow, the Morongo Thunder and Lightning Pow Wow, and the Taejon Indian Tribe Pow Wow at Cal State Bakersfield where event staff were present at an information booth providing attendees with Customer Assistance Program information. SoCalGas staff have continued to actively participate in the Inter-Tribal Educational Collaborative (ITEC) monthly meetings. SoCalGas staff also attended the 16th Annual American Indian Chamber of Commerce of California Expo. Additional meetings and follow-ups are scheduled for the remainder of 2019 along with participation in community events and continuing partnership with ITEC.</p>
SDG&E	19	<p>Since January of 2019, SDG&amp;E has attended 11 tribal events and presentations reaching over 700 people. The Tribal partners of our Energy Solutions Partner Network have shared SDG&amp;E messaging via social media and email reaching over 13,000 people.</p>
<b>Total</b>	<b>102</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		
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

Partner	Start Time	Event	Activity	Reach
SCTCA	1/1/2019	E-News - All Messages	Messaging	100
Ad-Hoc Event	1/25/2019	Rincon Community Preparedness Meeting	Event/Booth	35
SCTCA	2/1/2019	E-News - TOU	Messaging	400
SCAIR	2/1/2019	SCAIR - Website	Messaging	8,000
SCAIR	2/2/2019	Cuyamaca Pow Wow	Event/Booth	50
SCTCA	3/1/2019	Website - All	Messaging	300
SCTCA	4/1/2019	Website - All	Messaging	500
SCAIR	4/1/2019	Website - Assistance Programs	Messaging	800
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 - ESAP	Messaging	450
SCTCA	5/1/2019	Website - All	Messaging	800
SCAIR	5/1/2019	Eblast - TOU	Messaging	25
SCAIR	5/1/2019	Career & resource Fair Pala CA	Event/Booth	50
Ad-Hoc Event	5/18/2019	Jamul Tribal Earth Day	Event/Booth	13
SCAIR	6/5/2019	Safety Preparedness Presentaion	Presentation	20
SCAIR	6/14/2019	Men's Wellness Health Fair	Event/Booth	10
SCTCA	7/1/2019	Website - Summer EE Tips	Messaging	500
SCAIR	7/1/2019	Eblast - Level Pay Plan	Messaging	25
SCAIR	7/6/2019	Event - All Tribes Sycuan	Event/Booth	200
SCTCA	8/1/2019	Website - All	Messaging	700
SCAIR	8/1/2019	Eblast - Wild Fire Season is Here	Messaging	25
SCAIR	8/23/2019	Event - Back to School Night	Event/Booth	120
SCTCA	9/1/2019	Website - All	Messaging	700
SCAIR	9/1/2019	Eblast	Messaging	25
SCAIR	9/19/2019	Founders Day Open House	Event/Booth	60

\*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
Redbird's 18th Annual Children of Many Colors Pow Wow	Redbird, Ventura County Community Foundation, Moorpark College, the National Endowment for the arts, and the Moon Family Trust	Moorpark
18th Annual Hawaiian Gardens Pow Wow	City of Hawaiian Gardens	Hawaiian Gardens
American Indian Day 18th Annual Community Gathering and Family Picnic	United American Indian Involvement, Inc.	Los Angeles (Griffith Park)
Santa Ynez Pow Wow	Santa Ynez Tribe	Santa Barbara
Morongo Thunder & Lightning Pow Wow	Morongo Band of Mission Indians	Morongo Casino
5th Annual Tejon Indian Tribe Pow Wow	Tejon Tribe and Cal State Bakersfield	Cal State Bakersfield