

LOW INCOME OVERSIGHT  
BOARD MEETING (LIOB)



Seaside City Hall  
Council Chambers  
440 Harcourt Avenue  
Seaside, CA 93955  
1-866-642-1440  
7516937#

**Thursday, October 29<sup>th</sup>, 2015**

# Low Income Oversight Board (LIOB)

Thursday, October 29<sup>th</sup>, 2015

Seaside City Hall

Council Chambers

440 Harcourt Avenue

Seaside, CA 93955

10:00am – 3:30pm

[www.liob.org](http://www.liob.org)

Call - In Number 1-866-642-1440 - Passcode 7516937#

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[10:00am -10:10am.]	1.	Welcome and Introductions— Robert Castañeda, LIOB Chair and Commissioner Catherine J.K. Sandoval (10 minutes) <i>Standing Item</i>
[10:10 a.m. – 10:30 a.m.]	2.	Public Comments— Facilitated by Robert Castañeda, LIOB Chair (20 minutes) <i>Informational/Standing item</i>
[10:30 a.m. – 10:35 a.m.]	3.	Approval of the August 19 <sup>th</sup> , 2015 LIOB Meeting Minutes, Facilitated by Robert Castañeda, LIOB Chair (5 minutes) <i>Action Item</i>
[10:35 a.m. – 11:05a.m.]	4.	Investor Owned Utilities Reports – Utility Representatives (30 minutes) <i>Standing /Action/Discussion Item</i> a) CARE Enrollment Penetration and Expenditures b) ESA Homes Treated and Program Expenditures c) Projected Year-End Expenditures and Unspent Funds
[11:05 a.m. –11:35 a.m.]	5.	Legislative Update – CPUC- Office of Governmental Affairs – (30 minutes) <i>Informational/Standing Item</i>
[11:35 a.m. - 12:00 p.m.]	6.	Water Utilities’ Current Issues – Rami Kahlon – Director, Division of Water and Audits (25 minutes) <i>Update/Informational/Standing Item</i>
[12:00 p.m. – 1:00 p.m.]		Lunch (60 minutes)
[1:00 p.m. - 1:25 p.m.]	7.	Lifeline Telephone Program Update – Anna Jew, CPUC -Consumer Programs – Communications Division (25 minutes) <i>Informational/Standing Item</i> a) Lifeline Proceeding Update b) Update on Lifeline Direct Application Project c) Update on Current Outreach Contractor d) Tribal Lifeline Update 1. Average Subscriber Subsidy 2. Xerox Update on Potential Customers Qualifying for Tribal Lifeline 3. Propose Methods to Increase Penetration Rates for the Tribal Lifeline Program
[1:25 p.m. – 2:10 p.m.]	8.	Highlights of Upcoming Activities for Low-Income Energy Programs – Energy Division Staff (45 minutes) <i>Standing Item</i> a) Update on the Low Income Needs Assessment b) Update on SB 350

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[2:10 p.m. – 2:30 p.m.]	9.	Subcommittee Reports and Updates – Facilitated by Robert Castañeda, LIOB Chair (20 minutes) Standing /Action/Discussion Item
	a)	Marketing & Outreach (Board Members Toledo, Gross, Watts, Delgado-Olson & Rendler)
	b)	ESAP and CARE Implementation (Board Members Castañeda, Wimbley, Watts, Lopez & Rendler)
	c)	Workforce Education and Training (Board Members Hernandez & Castañeda)
	d)	Water Industry (Board Members Stephenson, Lopez and Castañeda)
	e)	Emerging Issues/Climate Change (Board Members Toledo & Delgado-Olson)
	f)	AB 327 Subcommittee (Board Members Hernandez, Lopez, & Wimbley)

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[2:30 p.m. – 2:50 p.m.]	10.	Sunne Wright McPeak, President and CEO, California Emerging Technology Fund Overview of the California Emerging Technology Fund and the Drive to Close the Digital Divide for All Low-Income Households (20 minutes)
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[2:50 p.m. – 3:10 p.m.]	11.	Elisabeth Russell, AMBAG Energy Watch Energy Efficiency & Climate Planning Programs (20 minutes)
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[3:10 p.m. – 3:30 p.m.]	12.	Future Meetings Dates & Agenda Items for Future Meeting (20 minutes) Discussion Item
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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 Zaida Amaya at (916) 928-4702 or sending a written request to 180 Promenade Circle, Suite 115, Sacramento, CA 95834. Providing your request at least five (5) business days before the meeting will help ensure availability of the requested accommodation.

Interested parties may attend in person or via teleconference. Notice of the Low Income Oversight Board meeting can be accessed at: [www.liob.org](http://www.liob.org)

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

This meeting notice is being sent to all parties on the service lists of Applications A.14-11-007, et al; and A.15-02-001, et al., And solely for the purposes of Commission's Ex Parte Communication Requirements, this notice will be deemed a functional equivalent of the notice pursuant to Commission's Rules of Practice and Procedure, Rule 8.3 (c)(1) for the proceedings A.14-11-007, et al; and A.15-02-001, et al.

Please note: the CPUC will be limiting the amount of meeting packages provided at the LIOB meetings in an effort to conserve paper and curtail printing expenses.

# *Welcome and Introductions*

# LIOB MEMBERS

**Robert Castaneda**

LIOB Chair

Proteus, Inc.

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[robertprm@gmail.com](mailto:robertprm@gmail.com)

Public Member Position

**Patricia Watts**

LIOB Vice-Chair

President/CEO

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Private Weatherization Contractor Representative

**Catherine J.K. Sandoval**

Commissioner

California Public Utilities Commission

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Commissioner

**Ortensia Lopez**

Executive Director

El Concilio of San Mateo County

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Public Member Position

**Jason Wimbley**Department of Community Services and  
Development

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[jwimbley@csd.ca.gov](mailto:jwimbley@csd.ca.gov)California Department of Community Services and  
Development Appointee**Jose Atilio Hernandez**

IDEATE California

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Public Member Position

**Dave Stephenson**American Water Works Service Company  
Rate Regulation Manager – Western Region

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Water Corporation Representative

**Charlie Toledo**

Director, Suscol Intertribal Council

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Napa, CA 94581

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Public Member Position

**Larry Gross**

Executive Director

COALITION for ECONOMIC SURVIVAL

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Public Member Position

**Benito Delgado-Olson**

K to College

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[benito@ktocollege.org](mailto:benito@ktocollege.org)

Governor Appointee

**Daniel J. Rendler**Director – Consumer Programs and Assistance  
Southern California Gas Company

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Los Angeles, CA 90013

(213) 244-3480

[DRendler@semprautilities.com](mailto:DRendler@semprautilities.com)

Electrical/Gas Corporation Representative

\* Per Article Six of the LIOB Charter, Officers shall serve a one year term.

*Approval of the August 19<sup>th</sup>, 2015  
LIOB Meeting Minutes*

# Low Income Oversight Board (LIOB)

Wednesday, August 19, 2015

City of Santa Ana  
Council Chambers  
22 Civic Center Plaza  
Santa Ana, CA 92701  
9:30am – 3:30pm

[www.liob.org](http://www.liob.org)

Call - In Number 1-866-642-1440 - Passcode 7516937#

**DRAFT MEETING MINUTES**

*Meeting Called to order at 9:32am by Chairman Castaneda*

## **LIOB Board Members Present:**

Chairman Robert Castaneda, Vice-Chairwoman Patricia Watts, Commissioner Catherine J.K. Sandoval, Ortensia Lopez, Dave Stephenson, Benito Delgado-Olson, Dan Rendler, Larry Gross and Charlie Toledo

## **LIOB Members Absent:**

Jose Atilio Hernandez and Jason Wimbley

## **California Public Utilities Commission (CPUC) Staff Present:**

Administrative Law Judge Anthony Colbert, Jamie Ormond, Rami Kahlon, Anna Jew, Joanna Gubman, Syreeta Gibbs and Zaida Amaya

## **Public Present:**

John Fasana, Lisa Mau, Tory Weber, Warrant Dotty, Danielle Manzano, Rose Casillas, Louis Lopez, Pam Greene, Jessica Lim, Lauri Walker, Jack Clark, Kimberly Lukasiak, Celine Apo, Valerie Ontiveroz, Vid Prabhakaran, Lori Williams, Sally Andreatta, Vanessa Melvin-Gunn, Art Brice, Luis Chavez, David Ortiz, David Clark, Allan Rago, Ron Garcia, Kim Hassan, Arleen Novotney, Mauricio Blanco, Jose Landeros, Emma Ponco, Dave Cantrell, Elizabeth Baires, Pamela Wu, Thuy Nguyen, Ted Humprey, Cynthia Bruno, Trevor Ware, Mary O'Drain, Lisa Long, Ayaka Emoto, Brandon Ridley, Allen Fernandez Smith, Claire Luffborough, Lisa Davison, Ty Tantum, Irma DePratti, Mayda Bandy, Carmen Rudshagen, Mark Aguirre, James Ozenne, Danielle De Clercq, Nguyen Quan, Natasha Siores, Cynthia Mifsud, Melissa Nottingham, Julissa Garcia, Marco Lizarraga and Anna Solorio,

1. Welcome and Introductions— Robert Castañeda, LIOB Chair and Commissioner Catherine J.K. Sandoval -  
*Standing Item*  
*Introduction of Dan Rendler, Utility Representative - SoCalGas*

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Chairman Castañeda welcomed everyone to the Low Income Oversight Board Meeting.

Commissioner Sandoval thanked the City of Santa Ana for their hospitality and allowing the LIOB to utilize its facility. Mr. Dan Rendler from SoCalGas was introduced as the LIOB's new utility representative. Commissioner Sandoval announced the two session workshop scheduled at today's meeting. She explained that these workshops are part of CPUC proceedings which involve the Energy Savings Assistance (ESA) Program and the California Alternate Rates for Energy (CARE). The first workshop will focus on the Small Multi-Jurisdictional Utilities (SMJUs) and their current activities in the ESA and CARE programs. The second session will focus on the Investor-Owned Utilities (IOUs) on a number of issues that have been raised in the ESA program, highlighting the unspent funds and high energy usage. Party and public comment will be allowed at the end of the workshop and a workshop report will be prepared as part of the record in the proceedings.

2. Approval of the May 28, 2015 LIOB Meeting Minutes, Facilitated by Robert Castañeda, LIOB Chair- *Action Item*

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A motion was made to approve the May 28<sup>th</sup>, 2015 LIOB meeting minutes. The motion was moved by Board Member Charlie Toledo and seconded by Chairman Robert Castaneda (Yes; Commissioner Sandoval; Board Members Lopez, Toledo, Castañeda, Delgado-Olson and Stephenson; motion passed) (Members Abstained; Board Members Rendler, Gross and Watts)

# Low Income Oversight Board (LIOB)

## 3. Workshop in Proceedings A.15-02-001 and A.14-11-007

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Commissioner Sandoval commenced the workshop in proceeding numbers A.15-02-001 (SMJUs) and A.14-11-007 (IOUs). The workshop report on the California Alternate Rates for Energy (CARE) and the Energy Savings Assistance (ESA) Programs of the Small and Multi-jurisdictional Utilities (SMJUs - A.15-02-001) and the Investor Owned Utilities (IOUs - A.14-11-007), can be viewed and downloaded at:  
<http://docs.cpuc.ca.gov/SearchRes.aspx?docformat=ALL&docid=154510541>

## 4. Overview of CSE's Program – Center for Sustainable Energy, Sachu Constantine, Director of Policy - *Informational Item*

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Ms. Laurie Walker, the manager for the Energy Upgrade California, Community Ambassador Program, provided an overview of the Energy Upgrade California (EUC) process and how the program is administered. Ms. Walker explained that this program consists of statewide Community Based Organization (CBOs). Ms. Walker highlighted the difference in the logos for Energy Upgrade California (EUC) and the Home Upgrade Program Energy Upgrade California (HUP EUC), and explained that based on CPUC guidance in decision, [D.13-12-038](#), EUC transitioned to serve as the primary statewide campaign to educate, residential and small business customers and the HUP EUC logo is to identify the whole house retro fit program. CSE signed contract with IOUs in February 2014 and in March 2014, CSE proceeded with outreach on climate credits and also launched their first version of its website. In May 2014 CSE had experiential events that focused on Energy Upgrade California and the marketing of the program and in September 2014, they launched a subsequent of its website and they also initiated their retail and community based CBO program. In May 2015, the statewide mobile education was launched and in the summer of 2015 they are focusing on the rebate finder, online energy management tool, youth education, small business and real state program.. There are 75 CBOs Statewide; 83% CBOs address the Low-moderate income; 10% CBOs address small business; and 6% CBOs address environmental issues. Ms. Walker explained the process for CBO training and grants, highlighting monthly webinars; upcoming campaigns/best practices; weekly social tips and training; online training modules and onsite training in targeted areas. She also reported on the CBO channel highlights from Sept 2014 - July 2015. Ms. Walker informed the Board that CSE is waiting for the bridge funding to be approved for 2016 to continue the program, and explained that the parameters with this program only allows for half of the budget, and CSE has requested for additional funding to continue and not lose momentum with the education of Californians in 2016-2017 on energy efficiency and the ESA program. CSE also proposes an Annual statewide ESA Summit on outreach to share best practices; address barriers and lessons learned. The Board thanked Ms. Walker for her presentation.

CSE's presentation can be view and downloaded at:  
<http://www.liob.org/docs/Item%204.%20Center%20for%20Sustainable%20Energy.ppt>

## 5. Legislative Update – CPUC- Office of Governmental Affairs – *Informational/Standing Item*

The office of Governmental Affairs was not able to present before the board. The following list of low income related bills was provided to the Board.

<http://www.liob.org/docs/Item%205.%20Summary%20of%20Low%20Income%20Related%20Bills%20-%20Office%20of%20Governmental%20Affairs.pdf>

## 6. Public Comments— Facilitated by Robert Castañeda, LIOB Chair - *Informational/Standing item*

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Casey McFall from Milestone Consulting discussed Lifeline subscription in the limited English proficient population. Ms. McFall commented that customers are dropped because they do not understand the process and that there is no effective appeal process. She also mentioned that with the implementation of the new wireless Federal Lifeline program, there is a new set of issues for the limited English communities, particularly related to what the Commission calls, aggressive sales practices. Ms. McFall stated that many companies do not inform customers about the qualifications to only have one discounted service per household, which is a misrepresentation, fraud, and a violation of the Commission's own limited English proficient decision that requires any company that markets in language to provide terms and conditions of the contract to the customer's language. Due to the lack of information provided to the customer, many customers end up with bills of up to \$400. CBO's in the TEAM (Telecommunications Education and Assistance in Multiple-languages) program are now faced with many customers asking for assistance to discontinue the cell phone service that they unknowingly signed up for; however, the appeals process prevents this from happening.

## Low Income Oversight Board (LIOB)

Ms. McFall also informed the Board that a letter has been drafted to go out to people who unknowingly were found to have two lifelines (cell phone and landline). The letter "Households that do not follow the one discounted service per household rule will lose their discounts, and may be prosecuted by the U.S. government. Receiving multiple discounted phone services violates the program's rules. Penalties for violating the California LifeLine Program's rules can include imprisonment, losing the discounts, monetary fines, and being banned from the California LifeLine Program. Also be advised that the phone company may disconnect your service and charge regular rates to continue your new use of phone service. Please contact the phone company if you would like to make new arrangements for phone service".

Ms. McFall asked for the Board to take this issue to the Commission and to take immediate action.

The Board thanked Ms. McFall for bringing this issue before the Board. Ms. Jamie Ormond from Commissioner Sandoval's office and Ms. Anna Jew from Telecommunications will look into this issue.

7. Highlights of Upcoming Activities for Low-Income Energy Programs – Energy Division Staff - *Standing Item*
    - Update: Low Income Needs Assessment
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Ms. Joanna Gubman, Supervisor of the Low Income and Residential Energy Efficiency Team provided an update on the IOU and SMJU consolidated application, it is anticipated that a proposed decision for both the IOUs and the SMJUs will be issued in October with comments and reply comments due in November, a final decision for the IOUs in November and subsequent a final decision for the SMJUs in December.

Ms. Gubman also provided the Board with an update on the recent activities surrounding the Low Income Needs Assessment, highlighting that the 2016 LINA RFP was issued on 7/22/15, with bids due 8/18/15. A contractor is expected to be selected by the end of September. Once the contract is in place, ED staff will coordinate with the LIOB and the IOUs on the refinement of the statement of work. The points of engagement that were agreed upon were: monthly conference calls between LIOB liaisons and CPUC staff; LINA updates and discussion during existing quarterly LIOB meetings, as needed and LIOB member participation in public stakeholder workshops.

Chairman Castaneda asked if given this construct if it was doable to involve and integrate some of the SMJUs within the LINA.

Ms. Gubman responded that ED will need to check where the funding comes from, and if comes out of the overall IOU proceeding and whether the same contract works for the SMJUs. She will keep the board updated.

Presentations can be viewed and downloaded at:

<http://www.liob.org/docs/Item%207.%20LINA%20Updaterrev.ppt>

<http://www.liob.org/docs/Item%207.%20ED%20highlights%20for%20August%2019%202015%20%20LIOBrev.ppt>

8. Lifeline Telephone Program Update – Anna Jew, CPUC -Consumer Programs –Communications Division  
*Informational/Standing Item*
  - a) Lifeline Proceeding Update (*Standing Item*)
  - b) Update on Lifeline Direct Application Project
  - c) Tribal Lifeline Update
    1. Allocation of Funds

# Low Income Oversight Board (LIOB)

## 2. Process for Carriers Offering Tribal Lifeline

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Ms. Anna Jew presented on Lifeline and reported that there are 12 approved CA Lifeline wireless providers, and 2 approved Federal Lifeline wireless providers; there are 8 pending CA Lifeline wireless providers and 4 pending Federal Lifeline wireless providers. As of July 31, 2015, there are 2,227,180 California LifeLine and/or Federal Lifeline participants. Ms. Jew mentioned that California Lifeline wireline continues to decline and that in the past 6 months it has been steadily declining at about 17,000 per month. As of July 31, 2015, the approved wireline participants is 712,693 and 1,512,245 wireless approved participants, combined CA Lifeline wireline and wireless the participation rate is at 73%. Ms. Jew also reported that there are 138 enhanced Lifeline participants, and explained that the reason Frontier and Verizon had dramatic decreases was due a miscoding and also to the fact that many customers are transitioning to wireless offerings. Ms. Jew informed the board that Xerox is working on providing on what can be potential CA Lifeline customers already on the program to be eligible for enhanced Lifeline. Ms. Jew will keep the Board informed on this process. Lastly, Ms. Jew reported on the process for a carrier to provide Enhanced Lifeline wireless and the mission and purpose of the Universal LifeLine Telephone Service Trust Administrative Committee.

Board Member Toledo commented that the numbers are still very low and that this program is not working at any level acceptable, and that some companies are not even aware of the enhanced lifeline program. Board Member would like a presentation on the plan to improve and change this process. Board member Toledo asked if RHA's contract is over, and that it is important to make sure the new contract omits any conflict of interest preventing consumers from sitting on the Lifeline committee.

Ms. Jew confirmed that the contract with RHA was over last year, but that new contract has not been set up with a new provider. She also informed the board that Telco Division is drafting their budget for 2016-2017, which appropriates funds to the marketing and outreach efforts.

Board Member Delgado-Olson asked about the average cost to get consumers to sign-up for these services.

Chairman Castaneda encouraged the Communications Division to move quickly on an outreach and marketing RFP, to select a vendor that can interact with this Board, and to start addressing some of low penetration issues, as this is a very critical issue for Tribal lands.

Ms. Jew's report can be viewed and downloaded at:

<http://www.liob.org/docs/Item%208.%20California%20LifeLine%20Presentation%20LIOB%20August%202015%20in%20Santa%20Ana.ppt>

## 9. Water Utilities' Current Issues – Rami Kahlon – Director, Division of Water and Audits- *Update/Informational/Standing Item*

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Mr. Rami Kahlon, Director of Division of Water and Audits provided an update on the drought; customer impacts; participation rates and water action plan. Mr. Kahlon highlighted that the Governor's order called for a 25% reduction across the State, and so far Californians have stepped up, with a 27.3% reduction across the State for the month of June. Mr. Kahlon shared the current reservoir levels; as of August 2, 2015: Shasta 43% (of capacity); Oroville 32% (of capacity) and Folsom 28% (of capacity). Mr. Kahlon noted that Godzilla El Nino may or may not materialize, and that there are not guarantees that there is going to be above average rain fall. He reported on the surcharge in both public and private agencies and noted that overcharges are being reduced for low income customers and that in general the IOUs customers are stepping up in meeting the water use reduction. All large (Class A) water utilities offer low-income bill assistance programs and about 250,000 CPUC-regulated residential water customers participate in income water assistance programs, there was a huge increase in participation rates in 2013 due to auto enrollments resulting from data exchanges between the energy and water utilities. One objective was to assist low income ratepayers and track service shut offs, he explained that there aren't a lot of service shut-offs for customers, because if water is shut off, the home becomes uninhabitable. The customers are given payment options, and the option to pay by credit card, the action plan calls to continue working with the LIOB; to develop standardized tariff discounts; which are still being discussed with the Commission, also, the increase of penetration rates which has happened and finally the enhance website, which the Commission is in the process of re-designing and making it more customer friendly. Lastly, Mr. Kahlon commented that they are addressing low income concern and that it has been a priority for this Commission. The Board thanked Mr. Kahlon for his report. Mr. Kahlon's report can be viewed and downloaded at:  
<http://www.liob.org/docs/ACF417.ppt>

# Low Income Oversight Board (LIOB)

## 10. New Assignments and Approval of the LIOB Subcommittees - *Action/Discussion Item*

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A motion was made for Board Member Dan Rendler to serve in the ESA and CARE Implementation subcommittee and the Marketing and Outreach subcommittee. The motion was moved by Board member Toledo and seconded by Chairman Castaneda (Yes: Lopez, Toledo, Watts, Castaneda, Gross, Stephenson and Rendler; motion passed)

## 11. Subcommittee Reports and Updates – Facilitated by Robert Castañeda, LIOB Chair - *Standing /Action/Discussion Item*

a) *Marketing & Outreach* (Board Members Toledo, Gross, Watts & Delgado-Olson)

b) *ESAP and CARE Implementation* (Board Members Castaneda, Wimbley, Watts & Lopez)

On July 29th, 2015 the Marketing & Outreach and the ESAP and CARE Implementation held a joint meeting. Most of the discussion was focused on what presented at today's meeting. The subcommittees agreed that it is important to have the annual presentation from the IOUs and SMJUs. The Marketing & Outreach subcommittee decided that it is important to provide input into the re-design of the LIOB website and possibly including a Facebook. Board Member Delgado-Olson is the lead on this project and will be working with ED staff.

c) *Workforce Education and Training* (Board Members Hernandez & Castaneda)

The Workforce Education and Training subcommittee did not meet.

d) *Water Industry* (Board Members Stephenson, Lopez and Castaneda)

The Water Industry subcommittee did not meet.

e) *Emerging Issues/Climate Change* (Board Members Toledo & Delgado-Olson)

Board Member Toledo reported that the Emerging Issues/Climate Change subcommittee met and discussed focusing on the education aspect, especially with respect to the drought. Board Members Toledo and Delgado-Olson will be working with climate.org for a possible presentation and the tactics they are using to educate the public about climate change.

f) *AB 327 Subcommittee* (Board Members Hernandez, Lopez, & Wimbley)

The AB 327 Subcommittee did not meet.

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The Board thanked the IOUs and the SMJUs for their thorough reports at today's meeting/workshop. The Board expressed concerns about the unspent funds as reported during the workshop session and the need to have collaboration to address the needs of the low income customers.

### *Future Meetings Dates & Agenda Items for Future Meeting - Discussion Item*

Board Member Gross suggested inviting stakeholders to attend a future LIOB meeting as this would benefit the Board to hear directly from the community. Chairman Castaneda agreed and suggested that might be an assignment for a subcommittee to take the lead on.

Board Member Lopez suggested inviting the California Emerging Technology Fund to make a presentation. Board Member Lopez will follow up with Chairman Castaneda.

### Upcoming Meetings:

Thursday, October 29<sup>th</sup>, 2015

10:00am - 3:30pm

Seaside City Hall

Council Chambers

440 Harcourt Ave

Seaside, CA 93955

The LIOB Meeting adjourned at 3:45pm

# *Investor Owned Utilities Reports- Utility Representatives*

- a) CARE Enrollment Penetration and Expenditures*
- b) ESA Homes Treated and Program Expenditures*
- c) Projected Year-End Expenditures and Unspent Funds*

# PG&E CARE-ESA Program Update

**Low Income Oversight Board Meeting**

Seaside, CA

October 29, 2015



## PG&E CARE Program

CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – Sept 30	1,420,197	1,635,673	87%	\$ 9,700,960	61%	\$424,199,462
2014 Year-End	1,413,334	1,648,774	86%	\$ 12,281,846	78%	\$ 607,206,765
2013 Year-End	1,386,070	1,574,844	88%	\$ 8,826,133	61%	\$ 703,432,080

# PG&E ESA Program

## Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	Expenditures	% of Authorized
2015 – September 30	77,134	119,940	64%	\$101,337,512	62%
2014 Year End	123,539	119,940	103%	\$145,940,449	88%
2013 Year End	123,566	119,940	103%	\$142,181,389	91%

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# PG&E ESA Program

## Projected Year-End Expenditures and Unspent Funds

Projected Expenses 2015	Amount Authorized 2015	Projected Unspent Funds in 2015	Total Unspent Funds Through 2014 <sup>1</sup>	Projected Unspent Funds Through 2015
\$137,000,000	\$162,218,020	\$25,218,020	\$93,059,282	\$118,277,302

<sup>1</sup> The \$41.1M in electric funds included in the total and requested to be applied to the 2016 revenue requirement in PG&E's Application has been adjusted to \$38.4M to reflect an accounting adjustment.

2014	2014 Total Unspent	Unspent as Percent Of Authorized	2014 Explanation <sup>4</sup>
Measures <sup>1</sup>	\$72,234,750	9%	Fund shifting rule restrictions between categories
Marketing & Statewide Marketing <sup>2</sup>	\$2,166,628	20%	Marketing efforts lower in previous years, increased contractor support to locate customers
Regulatory Compliance	\$630,424	31%	Amount varies per year depending on Regulatory needs and requests
General Administration	\$4,123,249	18%	Increased efficiencies led to lowered expenses
CPUC Energy Division	\$272,581	59%	Same amount budgeted annually, actual expenses based on Energy Division needs.
Other <sup>3</sup>	\$13,631,649	32%	NGAT inspection costs moved to GRC
<b>Total</b>	<b>\$93,059,282</b>	<b>10%</b>	

<sup>1</sup> Includes In-Home Education and Customer Enrollment

<sup>2</sup> Statewide Marketing has no unspent funds

<sup>3</sup> Includes Training, Inspections, and Evaluations/Studies

<sup>4</sup> Utilities must not overspend authorized budgets to avoid mid-cycle program shut down

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## PG&E CARE-ESA Contacts

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## ***Southern California Edison ESA and CARE Enrollment, Penetration, and Expenditure Update***

October 29, 2015

## Southern California Edison CARE Program

### CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – Sept. 30	1,294,962	1,499,342	86.4%	\$2,654,038	38%	\$278,881,306
2014 Year-End	1,311,210	1,499,830	87.4%	\$5,094,434	73%	\$386,148,028
2013 Year-End	1,335,607	1,410,534	94.7%	\$4,797,688	39%*	\$358,025,586

Notes: \* D.14-08-030 addressed SCE's Petition for Modification of D.12-08-044, filed in 2012, to reduce the 2012-2014 CARE Administration budget. The 2013 budget was reduced from \$12,256,000 to \$7,429,460.

# Southern California Edison ESA Program

## Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	Expenditures	% of Authorized
2015 – Sept. 30	35,257	87,389	40%	\$35,109,084	48%
2014 Year End	76,983	87,389	88%	\$55,886,233	77%
2013 Year End	69,031	87,389	79%	\$55,604,816	77%
Notes:					

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# Southern California Edison ESA Program

## Projected Year-End Expenditures and Unspent Funds

Projected Expenses 2015	Amount Authorized 2015	Projected Unspent Funds in 2015	Total Unspent Funds Through 2014	Projected Unspent Funds Through 2015
\$48,300,000	\$72,736,630	\$24,436,630	\$88,218,830	\$112,655,460

2009 - 2014	Total Unspent 2009 - 2014	Unspent as Percent Of Authorized	2009 - 2014 Explanation
Measures	\$71,211,022	20%	SCE underspent in all years except 2010. Reasons for underspending include: <ul style="list-style-type: none"> <li>Nearly doubling budget in 2009 requiring workforce expansion</li> <li>Meeting homes treated goal in 2011 while underspending by \$13 million</li> <li>2012 month-to-month bridge period created great program uncertainty</li> <li>In 2013 and 2014 factors include customer unwillingness and the Modified Three Measure Minimum Rule</li> </ul>
Local & Statewide Marketing	\$3,863,803	65%	
Regulatory Compliance	\$1,154,126	39%	
General Administration	\$9,024,771	33%	
CPUC Energy Division	\$298,835	63%	
Other	\$2,666,273	24%	
<b>Total</b>	<b>\$88,218,830</b>	<b>22%</b>	

Notes: The authorized ESA budgets for 2009 – 2015 total approximately \$476 million

"Other" includes Training, Inspections, Studies, Pilots. "Measures" include Enrollment and In-home education

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## Southern California Edison Contacts

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ESA Program – Roberto Del Real, Manager  
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# SDG&E CARE Program

## CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – Sept 30	273,555	370,088	74%	\$3,797,460	69%	\$46,929,241
2014 Year-End	278,931	368,229	76%	\$4,530,706	82%	\$63,897,068
2013 Year-End	300,554	353,997	85%	\$3,453,771	63%	\$64,079,640

Notes:

September 2015 CARE program data reported in SDG&E's Monthly Low Income Report submitted to CPUC October 21<sup>st</sup>.

2014 and 2013 Annual data reported in SDG&E's Low Income Report submitted to CPUC May 1 of each year.

# SDG&E ESA Program

## Number of Homes Treated and Program Expenditures

Year	Homes Treated	2015 Goal	% of Goal	2015 YTD Expenditures	% of Authorized
2015 – Sept 30	9,474	20,316	47%	\$11,889,168	50%
2014 Year End	22,039	20,316	108%	\$19,143,282	71%
2013 Year End	17,568	20,316	86%	\$17,874,649	81%

Notes:

September 2015 ESA Program data reported in SDG&E's Monthly Low Income Report submitted to CPUC October 21<sup>st</sup>.

2014 and 2013 Annual data reported in SDG&E's Low Income Report submitted to CPUC May 1 of each year.

# SDG&E ESA Program

## Projected Year-End Expenditures and Unspent Funds

Projected Expenses 2015	Amount Authorized 2015	Projected Unspent Funds in 2015	Total Unspent Funds Through 2014	Projected Unspent Funds Through 2015
\$26,904,989	\$23,772,250	\$5,072,250	\$20,078,232	\$25,150,482

## Total Unspent Funds by Category through 2014

Category	Total Unspent	Unspent as Percent Of Authorized	
Measures <sup>1</sup>	\$14,972,305	10%	SDG&E calculated the unspent ESA Program funds from 2006 through 2014. Unspent funds are attributable to : 1) Timing of the Phase II low income decision which granted SDG&E's budget augmentation. Timing led to a delay in implementing some of SDG&E's program plans 2) Timing of the decision also caused SDG&E to limit go-backs 3) The measure mix provided to dwelling varied from SDG&E's forecast.
Marketing & Statewide Marketing	\$1,639,136	23%	
Regulatory Compliance	\$797,437	30%	
General Administration	\$2,268,265	16%	
CPUC Energy Division	\$208,675	63%	
Other <sup>2</sup>	\$192,415	14%	
Total	\$20,078,232	12%	

Notes:

<sup>1</sup> Includes In-Home Education and Customer Enrollment

<sup>2</sup> Other = Inspections, and Evaluations/Studies categories

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# SDG&E Contacts

CARE & ESA Program – Joy Yamagata  
 Regulatory Manager 858-654-1755  
 JYamagata@semprautilities.com



## SoCalGas CARE Program

### CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – Sept 30	1,556,125	1,898,272	81.98%	\$78,546,009	53.25%	\$73,118,925
2014 Year-End	1,568,011	1,898,302	82.60%	\$117,510,411	79.66%	\$109,488,808
2013 Year-End	1,604,411	1,798,002	89.23%	\$125,388,452	85.90%	\$118,556,705

Notes:

1. September 2015 CARE program data reported in the SoCalGas Monthly Low Income Report dated October 21, 2015.
2. The 2014 and 2013 annual data reported in the SoCalGas' Low Income Report submitted to CPUC on May 1 of each year.

# SoCalGas ESA Program

## Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	Expenditures	% of Authorized
2015 – Sept 30	54,209	136,836	39.62%	\$55,622,962	42.01%
2014 Year End	92,967	136,836	67.94%	\$93,781,355	70.82%
2013 Year End	106,948	136,836	78.16%	\$97,554,614	82.98%

Notes:

1. September 2015 CARE program data reported in the SoCalGas Monthly Low Income Report dated October 21, 2015.
2. The 2014 and 2013 annual data reported in SoCalGas' Low Income Report submitted to CPUC on May 1 of each year.

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# SoCalGas ESA Program

## Projected Year-End Expenditures and Unspent Funds

Projected Expenses 2015	Amount Authorized 2015	Projected Unspent Funds in 2015	Total Unspent Funds Through 2014	Projected Unspent Funds Through 2015
\$75.9M*	\$131.4M	\$55.5M	\$113.3M	\$168.8M

2014	2014 Total Unspent****	Unspent as Percent Of Authorized	2014 Explanation
Measures **	\$104.4M	30%	Treated units below authorized
Marketing & Statewide Marketing	\$0.7M	19%	Funding uncertainty associated with bridge funding arrangements in 2012.
Regulatory Compliance	\$0.1M	6%	Not applicable
General Administration	\$2.5M	15%	Various
CPUC Energy Division	\$0.2M	90%	Budget prepared per ED guidance
Other ***	\$5.4M	44%	Treated units below authorized
<b>Total</b>	<b>\$113.3M</b>	<b>29%</b>	

Notes:

\* Projected based on trailing twelve month expenses through Sept. SoCalGas has identified several strategies designed to improve on current performance levels.

\*\* Includes Energy Education and Customer Enrollment budgets.

\*\*\* Includes Training, Inspections and EM&V budgets.

\*\*\*\* Represents total carry forward balances as of year end 2014.  
\$M = million dollars

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## Utility Contacts

CARE Program – Carmen Rudshagen, Program Manager @ [crudshagen@semprautilities.com](mailto:crudshagen@semprautilities.com)

ESA Program – Mark Aguirre, Program Manager @ [MAguirre2@semprautilities.com](mailto:MAguirre2@semprautilities.com)

Low Income Policy – Andrew Steinberg, Policy and Reporting Manager @ [ASteinberg@semprautilities.com](mailto:ASteinberg@semprautilities.com)

*Legislative Update*  
*CPUC - Office of Governmental*  
*Affairs*

**SUMMARY OF LOW INCOME RELATED BILLS**

<b>Bill / Author</b>	<b>TOPIC</b>	<b>Proposed Change to Existing Law</b>	<b>Disposition</b>
			address these problems, while maintaining rate payer protections.
<b>AB 682</b> <b>WILLIAMS</b>	Mobilehome park: electric and gas service: master-meter customers	Would authorize a person, without filing an application for an alteration or conversion with the department, to alter or convert, or cause to be altered or converted, the structural, fire safety, plumbing, heat-producing, or electrical systems and installations or equipment of a manufactured home or mobilehome in order to extend a gas line or electrical feeder line, or both, from a utility-owned service line to the electrical subpanel or gas inlet of the manufactured home or mobilehome only for the purpose of a natural gas or electric service utility upgrade, or both, within a mobilehome park.	SIGNED. No signing message.
<b>AB 693</b> <b>EGGMAN</b>	Multifamily Affordable Housing Renewables Program	Would require the commission to annually authorize the allocation of \$100,000,000, beginning with the fiscal year commencing July 1, 2016, and ending with the fiscal year ending June 30, 2026, from the greenhouse gas allowance revenues received by electrical corporations set aside for clean energy and energy efficiency projects for the Multifamily Affordable Housing Renewables Program, which the bill would create.	SIGNED. No signing message.
<b>AB 793</b> <b>QUIRK</b>	Energy efficiency	Would require weatherization programs to include energy management technology.	SIGNED. No signing message.
<b>AB 802</b> <b>WILLIAMS</b>	Public utilities: energy efficiency savings	Would require the PUC to authorize electrical corporations and gas corporations to count all energy savings achieved toward overall energy efficiency goals or targets established by the PUC. The bill would authorize the PUC to adjust the energy efficiency goals or targets of electrical corporations and gas corporations to reflect the energy savings achieved in meeting or exceeding energy efficiency requirements in existing buildings.	SIGNED. No signing message.
<b>AB 1262</b> <b>WOOD</b>	Telecommunications: universal service: California Advanced Services Fund	Would require that of the moneys collected for CASF on and after January 1, 2011, \$15,000,000 is to be deposited into the Rural and Urban Regional Broadband Consortia Grant Account and used for specified purposes, and \$10,000,000 is to be deposited into the	SIGNED. No signing message.

**SUMMARY OF LOW INCOME RELATED BILLS**

Bill / Author	TOPIC	Proposed Change to Existing Law	Disposition
<p align="center"><b>AB 88</b></p> <p align="center"><b>GOMEZ</b></p>	<p>Sales and use taxes: exemption: energy or water efficient home appliances</p>	<p>Would, until January 1, 2021, exempt from sales and use taxes the gross receipts from the sale of, and the storage, use, or other consumption in this state of, an energy or water efficient home appliance purchased by a public utility that is provided at no cost to a low-income participant in a federal, state, or ratepayer-funded energy efficiency program for use by that low-income participant in the energy efficiency program.</p>	<p>VETOED. Veto Message: To the Members of the California State Assembly: I am returning the following nine bills without my signature: Assembly Bill 35 Assembly Bill 88 Assembly Bill 99 Assembly Bill 428 Assembly Bill 437 Assembly Bill 515 Assembly Bill 931 Senate Bill 251 Senate Bill 377 Each of these bills creates a new tax credit or expands an existing tax credit. Despite strong revenue performance over the past few years, the state's budget has remained precariously balanced due to unexpected costs and the provision of new services. Now, without the extension of the managed care organization tax that I called for in special session, next year's budget faces the prospect of over \$1 billion in cuts. Given these financial uncertainties, I cannot support providing additional tax credits that will make balancing the state's budget even more difficult. Tax credits, like new spending on programs, need to be considered comprehensively as part of the budget deliberations.</p>
<p align="center"><b>AB 401</b></p> <p align="center"><b>DODD</b></p>	<p>Low-Income Water Rate Assistance Program</p>	<p>Would require the Department of Community Services and Development, no later than January 1, 2017, in collaboration with relevant stakeholders, to develop a plan for the funding and implementation of the Low-Income Water Rate Assistance Program.</p>	<p>SIGNED: Signing Message: To the Members of the California State Assembly: I am signing Assembly Bill 401, which directs the State Water Resources Control Board and Board of Equalization to develop a plan for establishing and funding a low-income water rate assistance program. My administration and the Legislature have taken important steps to promote access to safe, clean, affordable water. Yet, too many Californians still lack affordable, safe drinking water. While the plan called for in this bill will provide a path for modest, additional steps, we already know that Proposition 218 serves as the biggest impediment to public water systems being able to establish low-income rate assistance programs. Proposition 218 similarly serves as an obstacle to thoughtful, sustainable water conservation pricing and necessary flood and stormwater system improvements. My administration will work with the Legislature and stakeholders next year to</p>

**SUMMARY OF LOW INCOME RELATED BILLS**

<b>Bill / Author</b>	<b>TOPIC</b>	<b>Proposed Change to Existing Law</b>	<b>Disposition</b>
		Broadband Infrastructure Revolving Loan Account.	
<b>SB 7</b> <b>WOLK</b>	Housing: water meters: multiunit structures	Would, if a submeter is used to charge a tenant separately for water service, impose requirements on landlords relating to submetered water service to individual dwelling units.	Two-year bill. Failed to garner sufficient votes on the Assembly Floor.
<b>SB 350</b> <b>DE LEON</b>	Clean Energy and Pollution Reduction Act of 2015	Would require the California Public Utilities Commission and California Energy Commission to take into account benefits to disadvantaged communities and to review technology incentive programs to better align clean energy goals and help disadvantaged communities, among other major changes.	SIGNED. No signing message.
<b>SB 681</b> <b>HILL</b>	Corporation taxes: deduction: public utilities	Would not allow a deduction under the Corporation Tax Law for expenses or expenditures by Pacific Gas and Electric Company that the Public Utilities Commission identified in its San Bruno penalty proceeding, thus assuring millions more in taxpayer funds for low-income programmatic spending.	Two-year bill. Moved to the inactive file on the Senate Floor.

*Water Utilities' Current Issues*  
*Rami Kahlon, Director, Division of Water and Audits*

# *Lifeline Telephone Program Update*

## *Anna Jew—Consumer Programs*

- a) Lifeline Proceeding Update*
- b) Update on Lifeline Direct Application Project*
- c) Update on Current Outreach Contractor*
- d) Tribal Lifeline Update*
  - 1. Average Subscriber Subsidy*
  - 2. Xerox Update on Potential Customers Qualifying for Tribal Lifeline*
  - 3. Propose Methods to Increase Penetration Rates for the Tribal Lifeline Program*

# *Energy Division Reports and Updates*

- a) Highlights of Upcoming Activities for Low-Income Energy Programs*
- b) Update on the Low Income Needs Assessment*
- c) Update on SB 350*



# ***Energy Division Low Income Program Highlights & Upcoming Activities***

**LIQB MEETING  
OCTOBER 29, 2015  
SEASIDE, CALIFORNIA**





## IOU and SMJU Consolidated Application Anticipated Proceeding Schedules

ACTIVITY	IOU (A.14-11-007)	SMJU (A.15-02-001)
Proposed Decision	November 2015	November 2015
Comments on Proposed Decision	November 2015	November 2015
Replies to Comments on Proposed Decision	November 2015	November 2015
Final Decision	December 2015	December 2015





# 2016 Low Income Needs Assessment Status Update- Low Income Potential Analysis

Briefing for the Low Income Oversight Board

October 2015

Energy Division  
California Public Utilities Commission (CPUC)



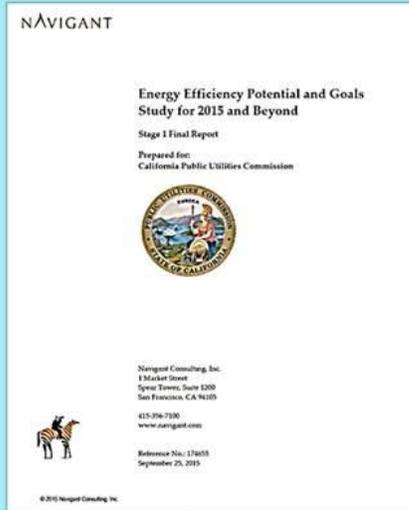
## Presentation Overview

- Background of existing low income potential analysis
- Description of what was revised in the most recent potential analysis
- How revised data changes low income potential results
- Recommendations for improving low income potential analysis in the future
  - **Research recommendations**
  - **Potential program recommendations to improve low income potential**





## Low Income Potential Analysis – Background



[www.californiaenergyefficiency.com](http://www.californiaenergyefficiency.com)

- Low income market potential was first included in the potential model in 2011
  - Inputs for low income potential was obtained from IOU reports and interviews with IOU staff
- The 2013 potential used the same data inputs used in 2011 potential analysis
- AB 327 requires a triennial low income needs assessment, including estimates for remaining low income potential
- The 2015 potential analysis used revised low income data inputs

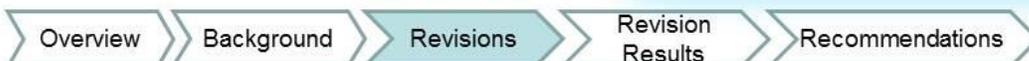
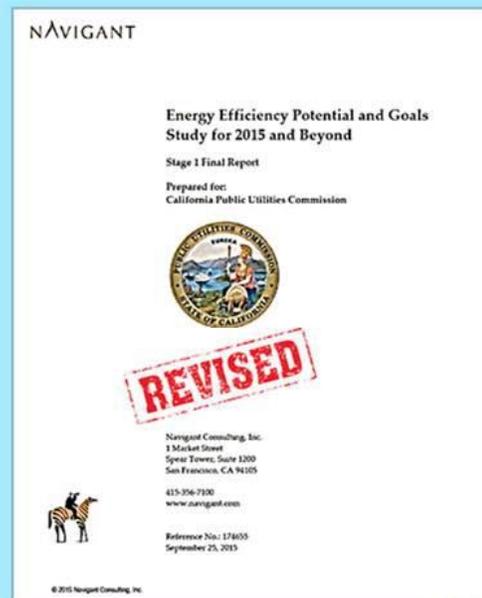


Slide 3



## Low Income Potential Analysis – Revisions

- The 2015 potential study included two primary data input revisions
  - Unit Energy Savings (UES)
  - Participation Forecast
- UES = Annual Reported Program Savings (2011 – 2014) / Total of Participating Homes.
  - Average Annual UES was then used to calculate 2015 – 2020 potential
- Participation Forecast: IOUs' 2015 ESA program participant forecasts for 2015 – 2020
  - Based on willingness to participate found in 2013 needs assessment



Slide 4



## LI Potential Analysis Revision Results - UES

Utility	Potential Model Version		
	2011-2013	2015 Draft	2015 Final
<b>KWh</b>			
PG&E	391	367	349
SCE	286	279	378
SDG&E	397	279	333
SCG	NA	NA	NA
<b>KW</b>			
PG&E	0.24	0.24	0.08
SCE	0.29	0.29	0.14
SDG&E	0.23	0.23	0.03
SCG	NA	NA	NA
<b>Therms</b>			
PG&E	20	22	15
SCE	NA	NA	NA
SDG&E	21	26	17
SCG	20	13	27

- The table to the left shows estimated UES as compared between the prior potential analyses and the current 2015 potential analysis.



Slide 5



## LI Potential Analysis Revision Results - Participation

2011 & 2013 Participation Assumptions

Year	Total	PG&E	SCE	SDG&E	SCG
2013	329,749	132,500	77,000	20,000	100,249
2014	326,749	132,500	74,000	20,000	100,249
2015	247,258	62,847	71,322	20,000	93,089
2016	232,596	58,847	69,821	18,000	85,928
2017	219,936	54,847	68,322	18,000	78,767
2018	207,276	50,847	66,822	18,000	71,607
2019	181,767	46,847	65,321	17,500	52,099
2020	165,233	42,847	63,822	17,400	41,164
2021	127,881	32,782	48,649	13,823	32,627
2022	93,396	24,567	36,206	11,055	21,568
2023	52,788	14,252	20,631	7,445	10,460
2024	16,105	3,248	3,919	3,865	5,073

Revised 2015 Participation Potential

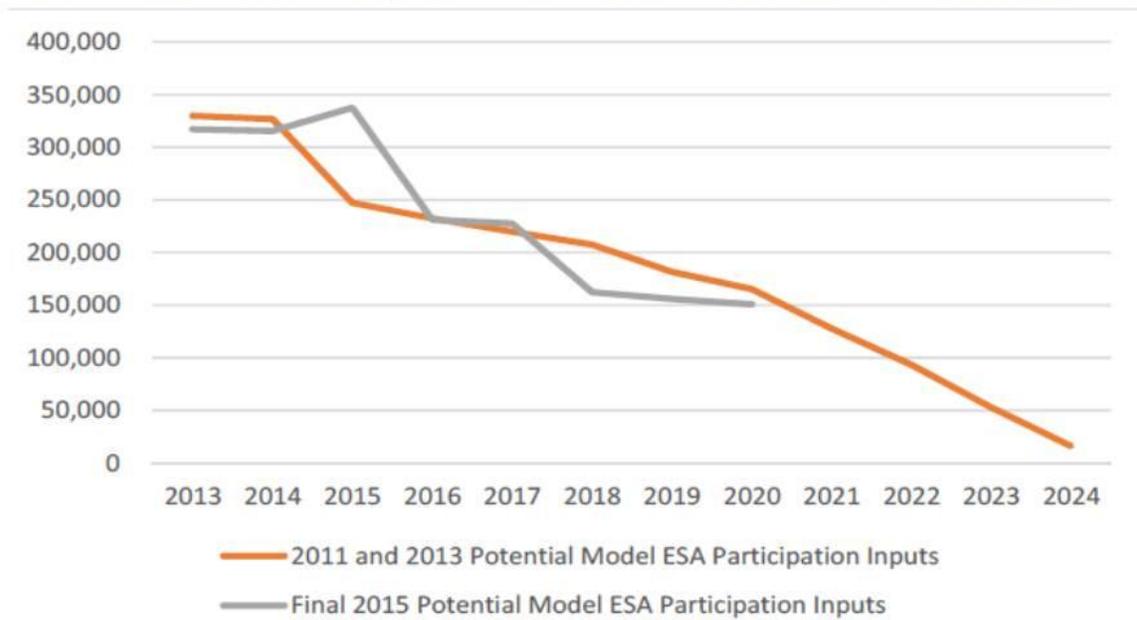
Year	Forecast of Total Homes Treated				
	Total	PG&E <sup>11</sup>	SCE <sup>12</sup>	SDG&E <sup>13</sup>	SCG <sup>14</sup>
2015	337,645	119,940	87,389	20,316	110,000
2016	231,316	47,000	54,000	20,316	110,000
2017	227,316	43,000	54,000	20,316	110,000
2018	162,316	38,000	54,000	20,316	50,000
2019	155,816	31,500	54,000	20,316	50,000
2020	150,876	26,560	54,000	20,316	50,000



Slide 6



## LI Potential Analysis Revision Results - Participation



Slide 7



## Future LI Potential - Research Recommendations

The current potential analysis represents a business as usual scenario – changes to research methodology and program implementation can affect LI potential

- Determine UES estimates specific to multi-family and single family homes
- Improve accuracy of energy savings resulting from high impact measures
- New program policies will need to be reflected in future calculations of potential (both EUS and participation). For example:
  - New Measures / Customized Measures
  - Allowing Retreatments
  - Any Changes to the Willingness to Participate Factor
  - Deployment of “Energy Management Systems” (AB793)
  - Leveraging Other Programs (ex: Lifeline)



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## *Subcommittee Reports and Updates*

- a) Marketing & Outreach (Board Members Toledo, Gross, Watts, Delgado-Olson and Rendler)*
- b) ESAP Implementation (Board Members Castañeda, Wimbley, Watts, Lopez and Rendler)*
- c) Workforce Education and Training (Board Members Hernandez and Castañeda)*
- d) Water Industry (Board Members Stephenson, Lopez and Castañeda)*
- e) Emerging Issues/Climate Change (Board Members Toledo and Delgado-Olson)*
- f) AB 327 (Board Members Hernandez, Lopez and Wimbley)*

*Sunne Wright McPeak, President and CEO  
California Emerging Technology Fund  
Overview of the California Emerging Technology  
Fund and the Drive to Close the Digital Divide  
for All Low-Income Households*



**California Emerging Technology Fund  
Overview of Presentation  
California Public Utilities Commission  
Low Income Oversight Board  
October 29, 2015**

**I. Mission and Role of the California Emerging Technology Fund**

- The California Emerging Technology Fund (CETF) was established by the CPUC as a result of mergers in 2005: SBC-AT&T and Verizon-MCI. AT&T and Verizon contributed \$60 million in seed capital as a public benefit.
- The mission of CETF is to close the Digital Divide. The overall goals are to achieve 98% broadband deployment and 80% broadband adoption (with no demographic group or region less than 70%) in a decade.
- CETF is outcomes-focused, performance driven, and works with government, regional and civic leadership groups, community-based organizations (CBOs), broadband providers, and other stakeholders as partners to achieve the goals.

**II. The Digital Divide Persists**

- Progress has been made in closing the Digital Divide in California, but the poorest households and most disadvantaged populations remain offline.
- Low-income households are being left behind at an accelerating pace, increasingly disenfranchised from the democracy itself with so many government services and access to jobs and other opportunities online.
- There are 3 primary barriers to broadband adoption by low-income households that must be addressed in any effective program to promote broadband adoption to ensure successful Digital Inclusion:
  - Cost
  - Relevance
  - Digital Literacy

### III. New Public Policy and Additional Resources Are Needed

- CETF funding all has been obligated and the original \$60 million seed capital will have been expended by June 2017. CETF continues to focus intensely on broadband deployment and adoption goals and payments will continue for Grant Agreements, School2Home Partnerships and other commitments.
- There are major opportunities to advance new public policy and secure additional resources to close the Digital Divide for all low-income households:
  - FCC Broadband Lifeline Proceeding: Design a program that address all 3 barriers to broadband adoption for low-income households which includes funding for CBOs, schools and libraries as “trusted messengers” to do outreach in-language and in-culture and assist with subscription sign-ups.
  - Corporate Consolidations: Urge the regulators to require investments in tangible public benefits that are “appropriate, fair, and comparable” including offering an affordable broadband rate (until FCC Lifeline Program is operational) and invest in CBOs to assist with broadband adoption.
  - California Advanced Services Fund (CASF): Support additional funding into CASF, including for connectivity in publicly-subsidized multi-unit housing.
  - Partnerships with Energy Utilities: Encourage energy utilities to forge and fund community partnerships to get their low-income customers online as part of their energy efficiency programs (broadband is a “green strategy”).
  - Education Policy: Secure funding for integration of technology into teaching and learning coupled with deep parent engagement with a focus on low-performing schools in low-income neighborhoods (School2Home model as the “centerpiece” for Neighborhood Transformation).
- CETF welcomes the CPUC Low Income Oversight Board to provide input and support to help advance new public policy, align existing efforts, and assist in securing additional resources to ensure that all low-income households in California are empowered through Digital Inclusion.

*Elisabeth Russell, AMBAG Energy  
Watch Energy Efficiency &  
Climate Planning Programs*

*Future Meeting Dates and Agenda  
Items for Future Meeting*