LOW INCOME OVERSIGHT BOARD (LIOB) MEETING

Tuesday, December 10, 2019
9:00 a.m. – 3:00 p.m.

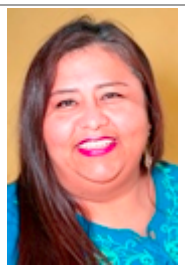
Hanford Civic Auditorium
Council Chambers Meeting Room
400 N. Douty Street
Hanford, CA 93230

Call-In Number
1-866-642-1440, Passcode: 75 16 937#

All meeting materials are available on the LIOB website at:
www.liob.org

Low Income Oversight Board Members	
Benito Delgado-Olson **LIOB Chair** SupplyBank.Org 7730 Pardee Lane Oakland, CA 94621 (510) 569-5862 benito.liob@gmail.com	 **Governor Appointee**
Maria Stamas LIOB Vice-Chair Western Director, Energy Affordability Natural Resources Defense Council 111 Sutter Street San Francisco, CA 94104 Phone (415) 875-6100 mstamas@nrdc.org	 **Public Member Position**
Robert Castaneda Proteus, Inc. 1830 N. Dinuba Blvd. Visalia, CA 93291 (619) 852-6290 robertprm@gmail.com	 **Public Member Position**
Genevieve Shiroma **Commissioner** California Public Utilities Commission 505 Van Ness Ave. San Francisco, CA 94102 Genevieve.Shiroma@cpuc.ca.gov	 **Commissioner**
Jason Wimbley **LIOB**	

Department of Community Services and Development 2389 Gateway Oaks Drive Sacramento, CA 95833 (916) 576-7129 jason.wimbley@csd.ca.gov	 **CSD Appointee**
VACANT POSITION	**Public Member Position**
VACANT POSITION	**Public Member Position**
Patricia Watts President/CEO FCI Management Consultants 3850 E. Gilman St. Long Beach, CA 90815 (562) 719-9300 patwatts@fcimgt.com	 **Private Weatherization Contractor Representative**
Daniel J. Rendler Director, Customer Programs & Assistance Southern California Gas Company 555 W. 5th Street, GT19A5 Los Angeles, CA 90013 (951) 830-6360 drendler@socalgas.com	 **Electrical/Gas Corporation Representative**
Jeff Linam California American Water 1033 B Avenue, Suite 200 Coronado, CA 92118 Jeffrey.linam@amwater.com	

	Water Corporation Representative
Lourdes "Lulu" Medina Dolores Huerta Foundation (559) 908-4692 lulourdesmedina@gmail.com	 **Public Member Position Representative**

Low Income Oversight Board Meeting

WWW.LIOB.ORG

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

WebEx

The LIOB website (www.liob.org) will be updated with WebEx log-in information in early December.

All meeting materials are available on the LIOB website at: www.liob.org

AGENDA

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

9:00 – 9:15 a.m.	1. Welcome and Introductions - Benito Delgado-Olson, LIOB Chairperson and Genevieve Shiroma, CPUC Commissioner *(15 min)* • Welcoming new board member Dan Rendler (SoCalGas)
9:15 – 9:30 a.m.	2. Public Comment (15 min) *Public comment is intended to provide an opportunity for members of the public who wish to address the board on a topic that is not on the agenda. Members of the board are not allowed to take any formal action on an item not on the agenda. If possible, it is requested that public comment be limited to 2 minutes per speaker.
9:30 – 9:30 a.m.	3. Approval of the September 16, 2019 LIOB Meeting Minutes - Action Item
9:30 – 9:45 a.m.	4. Comment from Community-Based Organizations – Discussion Item *(15 min)*

Low Income Oversight Board Meeting

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December 10th, 2019

9:45 – 9:50 a.m.	5. Coordination Report on Low Income Weatherization Program (LIWP) - Jason Wimbley, CSD (5 min)
9:50 – 10:05 a.m.	6. Self-Help Enterprises Update on San Joaquin Valley Proceeding efforts *(Abigail Solis, 15 min)*
10:05 – 10:25 a.m.	7. TEAM & CHANGES Report on outreach methods - Ravi Mangat (CPUC) and Casey McFall (Milestone Consulting) *(20 min)*
10:25 – 10:35 a.m.	8. CPUC Standing Reports – Informational Items *(10 min)* a. Legislative Update - Office of Governmental Affairs – *Informational Item* b. Energy Division Updates – Energy Division Staff – *Informational Item*
10:35 – 10:50 a.m.	9. Subcommittee Reports *(15 min)* a. Low Income Energy Assistance Programs Subcommittee • Castaneda, Stamas, Watts, Wimbley, Rendler, and Medina b. Legislative Subcommittee • Delgado-Olson, Stamas, Watts, and Castaneda c. Water and Climate Change Subcommittee • Liman, Delgado-Olson, Castaneda, and Medina d. Low Income Needs Assessment (LINA) Subcommittee • Delgado-Olson, Castaneda, and Rendler
10:50 - 11:15 a.m.	10. Marin Clean Energy Presentation on its Application for a Multifamily Whole Building program under ESA – *Informational/Discussion Item* (25 mins) • Presentation by Alice Havenar-Daughton, Director of Customer Programs (15 min) • Questions (10 min)
11:15 – 12:00 a.m.	11. ESA Multi-Family Single Administrator Issue (45 min) – Discussion/Action Item • Presentation on proposed next steps from LIOB subcommittee members • Public comment and discussion • Possible LIOB vote

12:00 – 1:00 p.m.	*Lunch*
1:00 – 1:15 p.m.	12. Updates on the Technical Advisory Committee, Disadvantaged Communities Advisory Committee, and related proceedings (15 min) a. Technical Advisory Committee Update (Delgado-Olson & Wimbley) • Barriers Identified by IOUs when Contracting with Public Assistance Agencies for CARE Outreach *(15 min)* b. Disadvantaged Communities Advisory Committee Group Update (Castaneda) c. Update on the Disconnection and Affordability Proceedings (Stamas)
1:15 – 1:30 p.m.	13. Update on Solar on Multifamily Affordable Housing (SOMAH) program *(15 min)* • Jae Berg, SOMAH Program Manager from the Center for Sustainable Energy (CSE) • Chris Walker, SOMAH Program Manager from GRID Alternatives • Sarah Hill, SOMAH Program Manager from the Association for Energy Affordability
1:15 – 1:35 p.m.	14. Investor Owned Utilities ESA/CARE Status Reports (20 min) • Board member questions on IOU status reports (10 min) ○ *Instead of presenting, IOUs are asked to share their slides with the board in advance of the meeting and be prepared to answer questions* • Energy Division presentation on rules regarding unspent funds (10 min)
1:35 – 3:00 p.m.	15. IOU Presentations on Final Versions of their 2021-2026 ESA/CARE Applications, filed Nov 4, 2019 – *Informational/Discussion Item* • PG&E (10 min) • SDG&E (10 min) • SCE (10 min) • SoCalGas (10 min) • Q&A Session (45 min)

3:00 p.m.	16. Future Agenda Items/Closing • Date and location of Q1 2020 LIOB Meeting will be announced in early January

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 Kapil Kulkarni at kapil.kulkarni@cpuc.ca.gov or sending a written request to 320 West 4th Street, Ste 500, Los Angeles, CA, 90013. Providing your request at least five (5) business days before the meeting will help ensure availability of the requested accommodation.

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

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

1. Welcome and Introductions – Benito Delgado-Olson, LIOB Chairperson and Genevieve Shiroma, CPUC Commissioner

2. Public Comment

3. Approval of the September 16, 2019 LIOB Meeting Minutes - Action Item

Low Income Oversight Board Meeting

Draft meeting notes

Monday September 16, 2019, 9AM-3:30PM

Vista del Mar Middle School, Multi-Purpose Room

4885 Del Sol Blvd.

San Diego, CA 92154

Opening Remarks – Welcomes and Introductions:

Board Chair Delgado-Olson opened the meeting, and announced the State Senate confirmation of California Public Utilities Commission (CPUC) Commissioner Shiroma on July 8th. The Chair also announced the departures of Board Members Toledo and Murphy-Roach, and of the Energy Division liaison, Zaida Amaya.

Public Comment:

Multiple organizations spoke regarding the digital divide and the need to increase broadband access to low income customers.

June 24th Meeting Minutes:

The Board approved the minutes from the June 24th meeting.

Placeholder for Community Local Groups:

Marco Lizarraga of La Cooperativa Campesina spoke about his organization's partnership with the Community Services Department's (CSD) Low Income Weatherization Program (LIWP). Board Member Castaneda spoke about the difference of using Area Median Income vs. Federal Poverty Guidelines and Board Chair Delgado-Olson also recognized the work of the organization.

Anna Hasselblad of United Ways of California requested to submit a letter, regarding Investor-Owned Utilities (IOUs) support of increased broadband access for low income customers, to the Board, the IOUs, and the CPUC. The letter is attached here.

Sunne McPeak of the California Emerging Technology Fund spoke about the IOUs potential opportunity to conduct outreach to low income customers regarding energy efficiency and the connection with broadband access. Board Member Medina asked about the goals and targets; Ms. McPeak responded with the need to reach 500,000 more customers over the next 3-10 years to reach 90 percent of low income customers.

Special Reports / Updates:

Due to a conflict with the Governor's Office, Board Member Wimbley was not present; his CSD/LIWP and IOU Coordination Report was emailed to the Board on September 17th, 2019.

Communications Division:

Caleb Jones of the CPUC's Communications Division presented on the LifeLine program's Boost Mobile, and iFoster Pilots program, providing discounted and/or free mobile phones and service to foster youth.

CPUC Standing Reports:

Kevin Truong of the CPUC's Water Division presented the Water Utilities update.

A revised CPUC Legislative Update was displayed at the meeting and on the Webex.

Kapil Kulkarni of the CPUC's Energy Division presented the Energy Division update, including a brief summary of the August 27th IOU Public Workshop on Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE) applications. In response to questions, he also provided attendance figures from the first workshop and instructions to receive notice of similar meetings related to a proceeding.

Action Item: Confirm "Relevant Proceedings" link on LIOB website is working.

Subcommittee Reports and Updates:

The Legislative Committee met twice to review these bills, and voted to support Senate Bill (SB) 704 and Assembly Bill (AB) 386. During the joint Legislative and Energy Assistance Programs Committee meeting on August 7th, the Legislative Committee voted to oppose AB 1366 due to potential negative impacts on the Lifeline program. Both of the supported bills were sent to the Governor; the opposed bill was held in committee.

The other committees (Water and Climate Change, and Low Income Needs Assessment) did not meet.

Single Administrator Discussion:

This item was placed on the agenda from the August 7th joint Low Income Energy Assistance Programs (LIEAP) and Technical Advisory Committee (TAC) meeting. Commissioner Shiroma spoke about the background of the issue, clarified the guidance, and summarized the stakeholder feedback received so far from the public workshop. Board Chair Delgado-Olson spoke about the need to provide a formal in-depth committee-based process to incorporate all stakeholder feedback, and provide consensus-based recommendations. The Board Chair introduced a motion for the committee to develop recommendations by December so it can be voted on by the full Board.

Anna Solorio of CHOC stated that the Multi-Family Working Group was created from the last decision because the issue was contentious and complex. She believed that the guidance did not take the MFWG recommendations into account, and said the group's report recommendations (due by the end of the year) should be incorporated into the IOU applications.

Dave Clark of Synergy recommended increasing the income guidelines and/or using AMI per the CSD LIWP program.

Chris Porter of CHOC emphasized continuation of the personal touch and ensuring the program doesn't go too hi-tech.

Board Vice Chair Stamas mentioned Public Utilities Code 327 (b) – that any ESA bidder must have knowledge of local community, and also discussed the need for workforce development within the Multi-Family Whole Building (MFWB) program.

The motion passed by consensus. Board Chair Delgado-Olson and incoming Board Member Rendler were added to the LIEAP Subcommittee. This committee will likely have a joint meeting with the TAC.

More Committee Updates:

Board Chair Delgado-Olson said the TAC had not met since prior to the previous joint meeting. He mentioned that the Board had decided at the June meeting in Compton to discuss regulatory barriers to direct contracting with social service agencies for the purpose of increasing CARE enrollment, and asked the IOUs to provide an update at the next Committee meeting.

> Action Item: IOUs to present on direct contracting efforts at next TAC meeting.
>
> Action Item Complete: Yes, item is on the October 8 TAC meeting agenda.

Board Chair Delgado-Olson also noticed common themes of (lack of) trust and difficulty of income verification in the IOU presentations. He said the purpose of the TAC is to have a more holistic view (not just the IOUs), including working with county and other municipal agencies that provide public assistance and means test their clients, and breaking down silos between the various programs that provide services to low income customers.

Board Member Castaneda said there was no update from the (Disadvantaged Communities) DAC Advisory Committee.

Board Vice Chair Stamas stated that Phase II of the Disconnections Order Instituting Rulemaking (OIR) will be important, in terms of bringing in innovative ideas.

Joint IOU Reports:

Board Vice Chair Stamas asked SCG about interest on unspent funds. SCG responded via email on September 26th:

> As of August 31, 2019, SoCalGas has accrued a total of $3,339,467 in interest on the unspent Energy Savings Assistance Program funds for 2019. This amount has been recorded in the Direct Assistance Program Balancing Account (DAPBA). The unspent funds accrue interest to ratepayers based on the average balance in the account at the 3-month commercial paper rate as indicated in SoCalGas' Commission approved Preliminary Statement for the DAPBA. This interest is refunded to ratepayers through reduction of PPP surcharge rates. See links below:
>
> *(-https://www.socalgas.com/regulatory/tariffs/tm2/pdf/DAPBA.pdf ; Section J.1. - https://www.socalgas.com/regulatory/tariffs/tm2/pdf/PS-I.pdf)*

Board Member Delgado-Olson asked where the interest on unspent funds are placed. Mary O'Drain of PG&E responded that, at a high level, it is added to the principal.

Commissioner Shiroma mentioned a Low Income simulator exercise at the National Association of Regulatory Utility Commissioners (NARUC) meeting she attended.

The meeting adjourned for lunch at 11:50AM and returned at 12:50PM.

IOU presentations:

Each of the IOUs presented on their draft post-2020 ESA/CARE program applications, followed by Q&A.

Anna Solorio of CHOC was pleased that stakeholder feedback from the August 27th public workshop was incorporated into the latest IOU presentations. She also stated that the program contains a strong Workforce Development history, including employees starting at minimum wage and increasing to $30 per hour. She was also concerned about the potential for public money to be invested in private property, in the case of non-deed restricted Multi-family properties as part of the ESA Multi-Family Whole Building program.

Anna Hasselblad of United Ways of California discussed the digital audits and the link to broadband, and how workforce development goals may fall short without broadband access.

Allie Cannington of CFILC/DON wanted to ensure that all materials are available to all communities (including those with disabilities), and pointed out that a majority of the Presidential candidates' websites are not ADA-compliant.

Jeanne Clinton asked SCE about Multi-family buildings with high use (5% of market), and how to treat these buildings from a whole building perspective, from targeting individual customers vs entire buildings. SCE said they do not have this analysis but will be looking at energy intensity.

Commissioner Shiroma commented that SCG is playing catch-up on new treatments and wondered if there is coordination with SCE. Mark Aguirre of SCG said there is coordination among joint contractors, as well as information sharing on which homes have been treated. He also commented that SCG is not able to offer the most attractive measures (like refrigerators) – customers are often more interested in electric-saving measures.

Board Member Watts commented that customers should get gas measures first, then get a refrigerator. She said the customer acquisition cost is higher with the individual measure / fuel approach.

Board Member Medina said that customers are confused by kW and kWh, and that contractors need to point out the value of the service.

Commissioner Shiroma asked about the number of MF properties in the SDG&E territory; SDG&E clarified that it is a likely eligible population of 3,700 out of 11,000 total properties.

Board Member Stamas asked if there is a per home cost cap. Mark Aguirre of SCG clarified that there is a minor home repair cap of $1,000, but no other per household caps.

Board Chair Delgado-Olson reiterated that the Board is statutorily obligated to look after ratepayer-funded programs for electricity, gas, water, and Lifeline as it relates to outreach for CARE.

Board Chair Delgado-Olson requested the IOUs inform the board how many households (total and low income) have connectivity and/or mobile devices and are able to receive notifications related to disaster relief, shutoffs, PSPS, etc. Holly Merrihew of SCE said that it is a different group within SCE. The IOUs stated that they are always asking for customers to sign up for notifications about wildfires, Public Safety Power Shutoffs (PSPS), etc.

Board Chair Delgado-Olson also asked if Workforce Education and Training (WE&T) is being incorporated into applications. Mark Aguirre of SCG responded affirmatively. PG&E stated that there are lots of EE programs that LI will leverage for WE&T. SCE stated that they will apply to move EE WE&T to LI.

Commissioner Shiroma stated the need for the IOUs to have metrics and goals, and that the CPUC likes having metrics and goals.

At this point, the meeting was adjourned for the Mexican Independence Day celebration.

Complete Meeting Audio:

ftp://ftp2.cpuc.ca.gov/AudioVisualFiles/LIOB_09162019_partI.wav - Morning Session

ftp://ftp2.cpuc.ca.gov/AudioVisualFiles/LIOB_09162019_partII.wav - Afternoon Session

4. Comment from Community-Based Organizations – Discussion Item

5. Coordination Report on Low Income Weatherization Program (LIWP) - Jason Wimbley, CSD

6. Self-Help Enterprises Update on San Joaquin Valley Proceeding efforts

7. TEAM & CHANGES Report on outreach methods - Ravi Mangat (CPUC) and Casey McFall (Milestone Consulting)

CHANGES Program Report to the Low Income Oversight Board

Consumer Help and Awareness of Natural Gas and Electricity Services (CHANGES)

Self-Help for the Elderly
Milestone Consulting LLC
December 10 , 2019

CHANGES Services Provided

Quarter 1

June 17 – September 30, 2019

- Outreach – Over **260,000** potentially reached
- Consumers Educated: **12,649**
- Needs Assistance cases: **1,060**
- Dispute Resolution cases: **491**

Dispute Resolution cases

Quarter 1

June 17 – September 30, 2019

491 Dispute Resolution Cases

Most prevalent issues this quarter:

1. Gas Aggregation
2. Stop Disconnection
3. Payment Plan
4. Electricity Aggregation

Needs Assistance cases

Quarter 1

June 17 – September 30, 2019

1,060 Needs Assistance Cases

Most prevalent services this quarter:

1. HEAP application assistance
2. Changes to account
3. Changed billing language
4. Medical Baseline application assistance
5. Negotiate payment plan
6. ESAP application assistance

Outreach Activities

In the 2018-19 program year, outreach efforts potentially reached over **3.5 million** consumers.

CBOs utilize their outreach budget by identifying the best outreach activity to reach the communities they serve.

Typically, outreach efforts incorporate both TEAM and CHANGES programs into their content.

Community Events

Outreach is conducted at local ethnic festivals and holiday events, and health and resource fairs.

Events must reach a minimum of 500 people.

In the 2018-19 program year, outreach at community event touched **695,772 people at 143 events**.

Media Outreach

CBOs provide program information through ethnic television, radio and print media.

In the 2018 – 2019 program year, **2,643,700** consumers were potentially reached through media outreach.

Community Presentations

- Presentations at coalition, collaborative and task force meetings
- Designed to reach consumers at non-TEAM & CHANGES CBOs
- Referral process described
- Must reach minimum of 5 organizations

Social Media

- Postings on Facebook, Twitter and Instagram
- Must be in-language
- Minimum 5 postings required for payment
- Least utilized outreach component by CBOs/Least likely to reach targeted populations

Bill Fairs

- Organized jointly by CBOs in a geographic region
- Typically include consumer education workshops and bill review
- Time consuming versus level of response

Special Outreach Projects

- CBOs may propose special projects specific to the needs of their communities.
- Projects are intended to reach highly targeted audiences.
- Limited funding allows CBOs to implement creative projects they otherwise would not have resources to conduct.
- CBOs must submit brief proposals for approval prior to implementation.

Examples of Special Outreach Projects

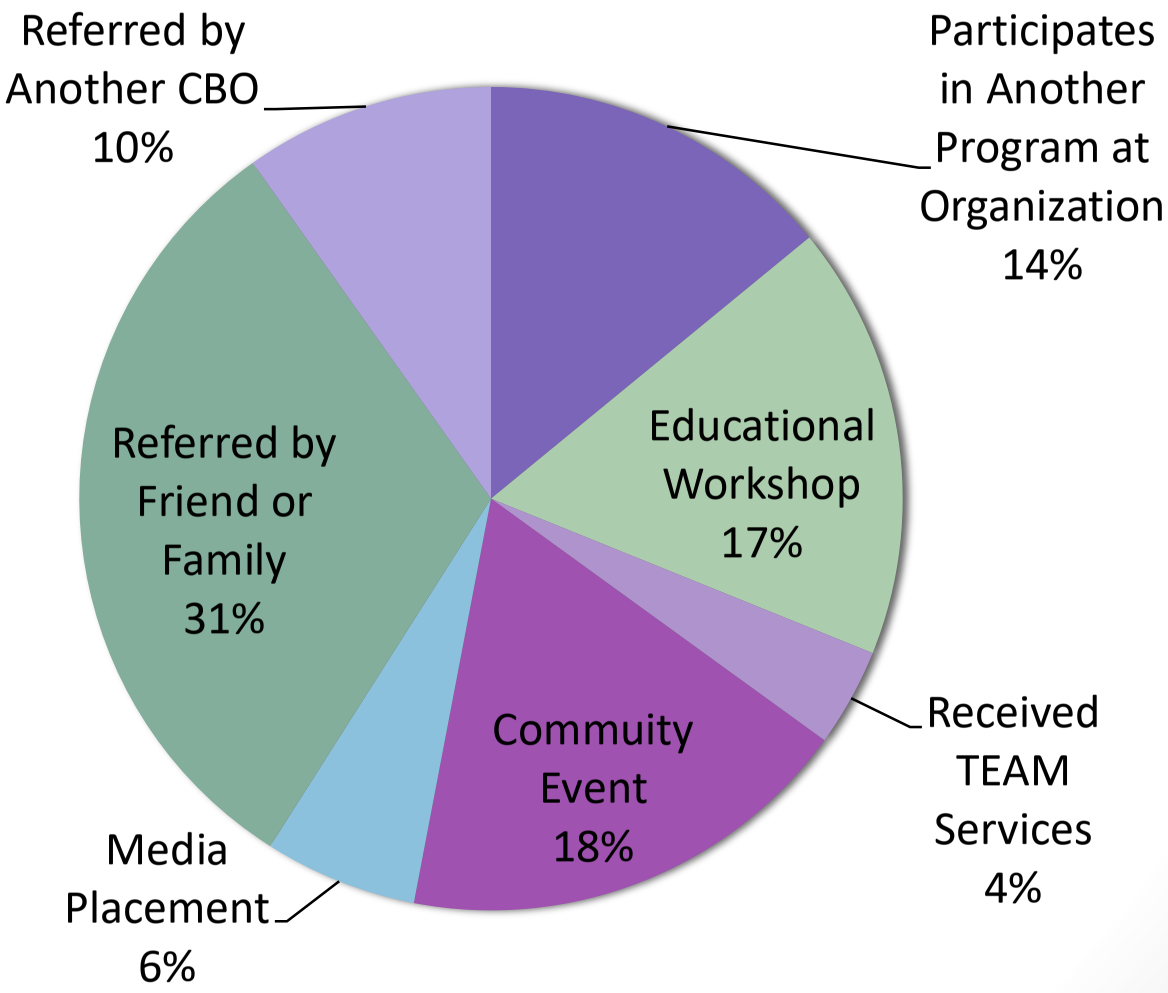
- Afghan women, unable to leave the home unattended, received home visits from female CBO staff to receive consumer education and bill review services.

- Migrant farmworker families received children's books accompanied by consumer education and food boxes. Literacy programs were modified to include consumer education.

- A consumer information holiday celebration was presented to the Vietnamese community. Activities included live music, fashion show, special holiday lunch, prize raffles and consumer education presentations. The CBO expected **150** attendees but ended up hosting **255** consumers.

Referral Source

May 1, 2018 – April 30, 2019



Program Contacts

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(415) 355-5556

8. CPUC Standing Reports – Informational Items

    a. Legislative Update - Office of Governmental Affairs – Informational Item

California Public Utilities Commission

Legislative Update – Office of Governmental Affairs

Bills of Interest to the Low-Income Oversight Board
Meeting – Tuesday December 10thh, 2019

1. Senate Bill 704 (Bradford): Telecommunications: Moore Universal Telephone Service Act.

This bill would have clarified the definition of a household for the purposes of Lifeline program eligibility, required the California Public Utilities Commission (CPUC) to update outreach and enrollment rules for the program, and required the CPUC to determine whether a Lifeline participant should be allowed to obtain an additional Lifeline subscription for broadband services.

Status: Vetoed by Governor.

2. Assembly Bill 386 (E. Garcia) - Agricultural Working Poor Energy Efficient Housing Program.

This bill would have required the Department of Community Services and Development, in consultation with the CPUC and Energy Commission, to develop and administer the Agricultural Working Poor Energy Efficient Housing Program to improve energy efficiency in farmworker-owned housing.

Status: Vetoed by Governor

3. Assembly Bill 1366 (Daly & Obernolte) - Voice over Internet Protocol and Internet Protocol enabled communications services.

This bill indefinitely extends the prohibition on CPUC oversight of VoIP and IP communication services, which would otherwise sunset on January 1, 2020. Under current law, VoIP providers are not mandated to comply with CPUC rules dealing with service quality nor are they required to comply with basic service requirements. The negative effects of this policy fall the hardest on low-income Californians. Under AB 1366, it would require a new act of law before the Commission or any other state agency would be authorized to act to ensure reliable communication if it involves VoIP or IP communication. The Commission has taken an **OPPOSE** position on the bill.

Status: Held in Committee.

8. CPUC Standing Reports – Informational Items

   b. Energy Division Updates – Energy Division Staff – Informational Item

Energy Division Program Proceeding Updates

Staff Briefing for the Low Income Oversight Board (LIOB) Meeting

December 10th, 2019

Energy Division
California Public Utilities Commission (CPUC)

- Disconnection OIR Update
- ESA/CARE Post 2020 Guidance
- Low Income Needs Assessment

Disconnection OIR Update

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

- Phase 1-A will address disconnections in SMJU territories.
- Phase 2 will take a broader look at the disconnection process and consider innovative solutions.

ESA/CARE Post 2020 Guidance

- The IOUs submitted applications for their post-2020 ESA/CARE programs by the November 4th deadline.
- The IOUs will present a summary of their applications later this afternoon.
- A pre-hearing conference is being scheduled for January.

2019 Low Income Needs Assessment
Timeline & Next Steps

- Draft Report Public Webinar - November 14, 2019
- Public comments on draft report - November 22, 2019
- Responses to stakeholder comments - December 6, 2019
- Final report will be posted - December 13, 2019
  - Public Documents Area - www.energydataweb.com & www.calmac.org
- Preliminary planning discussion re: 2022 LINA - December 18, 2019

9. Subcommittee Reports

10. Marin Clean Energy Presentation on its Application for a Multifamily Whole Building program under ESA – Informational/Discussion Item

MCE's LIFT 2.0 Application

Multifamily Income-Qualified Whole Building Program

December 10, 2019

- About MCE
- History of MCE as Energy Efficiency Low-Income Program Administrator
- MCE's LIFT 2.0 Application

OUR MISSION

Address climate change by reducing greenhouse gas emissions

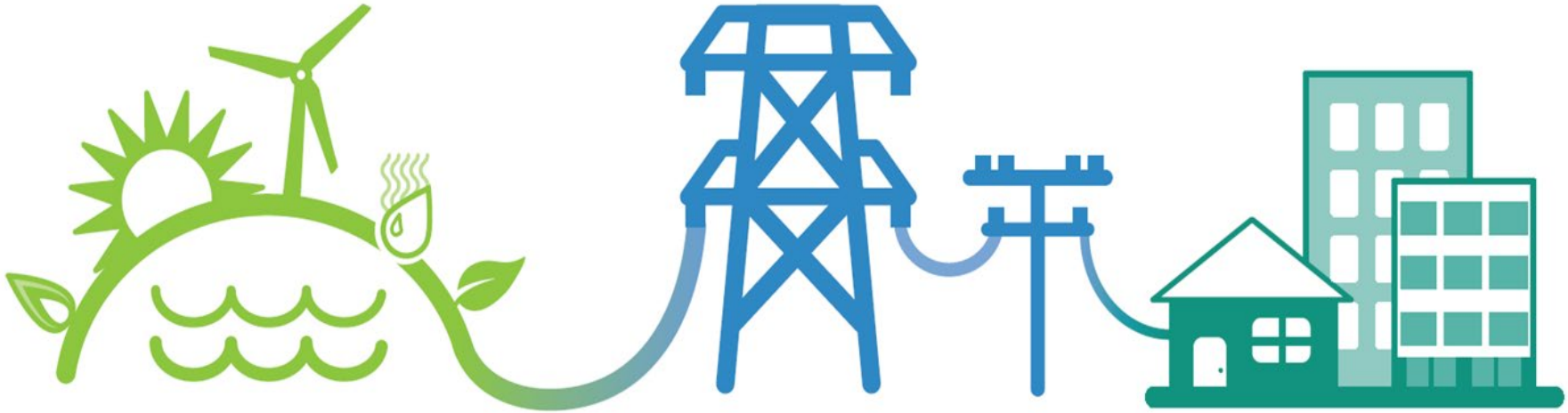
Renewable Energy

Stable, Competitive Rates

Local Economic & Workforce Benefits

Energy Efficiency

How Electric Service Works



MCE Generation

PG&E Delivery

Same Service

Discount Programs

Discount programs, including PG&E employee discounts, remain the same with MCE service.

CARE, **FERA**, and **Medical Baseline Allowance** are provided in full to MCE customers; **no need to reapply**.

34 Member Communities

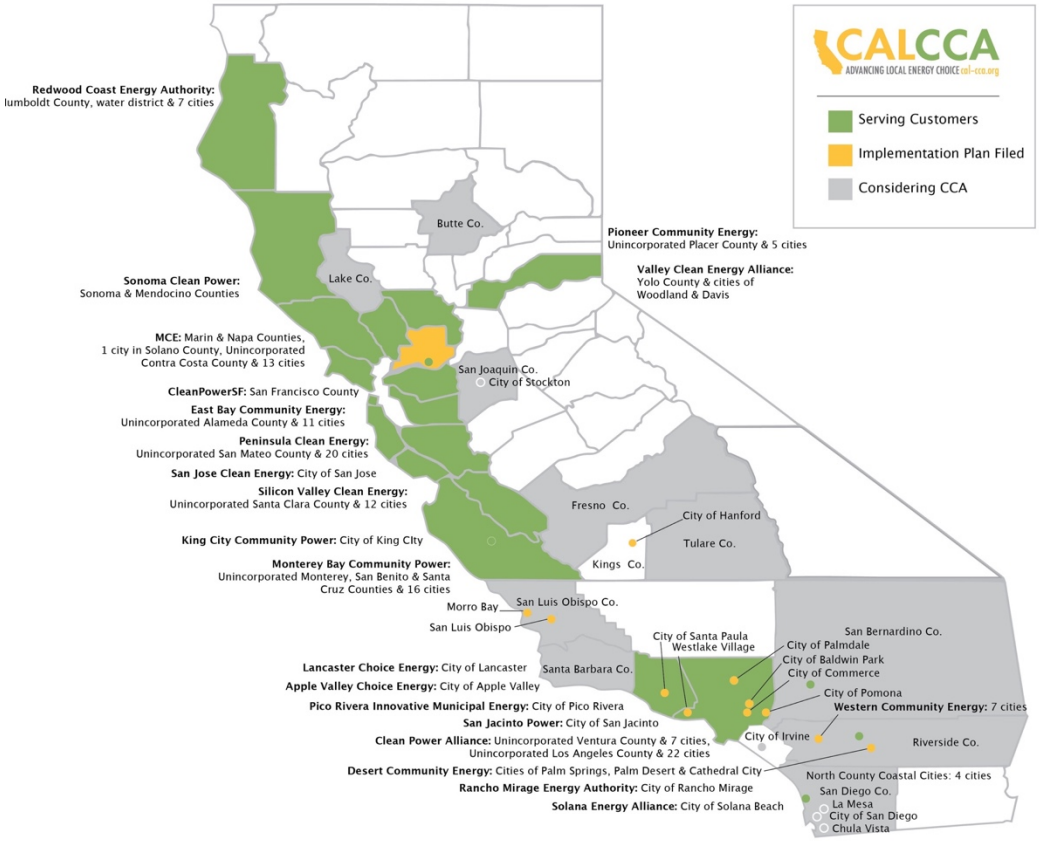
Marin County
+ 11 cities

Solano County
+ 1 city

Napa County
+ 5 cities

Contra Costa County
+ 13 cities

CCAs in California



MCE's LIFT 2.0 Proposal

- MCE submitted a program application under the Multifamily Whole Building track for the 2021-2026 ESA Program cycle.

- MCE's proposed program is a comprehensive energy savings program to qualified multifamily (MF) properties (including technical assistance, rebates, tenant education, workforce development activities, etc.)

History of MCE as Energy Efficiency Low-Income Program Administrator

LIFT Pilot Stats

MCE launched the Low-Income Families and Tenants (LIFT) Pilot Program in October 2017. LIFT layers rebates on top of MCE's standard MF energy efficiency program with an emphasis on reaching hidden communities and piloting fuel switching measures.

Participating households: 1,525 units, 24 properties

Completed EE installs: 197 units at 7 properties

Heat pumps: 173 in rebate reservation, 57 completed installation

82% of tenants surveyed were satisfied with the EE upgrades, 90% of tenants surveyed were satisfied with the heat pump technology

Reaching Hidden Communities:

- 65% of surveyed tenants were Spanish speaking
- 97% outside of a disadvantaged community (DAC)
- 98% had never participated in an EE program before

Lessons Learned from LIFT Pilot

- Benefits of a flexible measure list and participant choice in technology
- Efficiency in stacking programs
- Importance of health, comfort and safety improvements along side energy efficiency work

Lessons Learned from LIFT Pilot

- Low number of knowledgeable heat pump contractors – training need
- Tenant surveys indicated unfamiliarity with heat pump technology after install – need for user education
- Time consuming income verification processes if each unit has to be verified individually – implement property owner affidavits or base eligibility on deed restriction

LIFT 2.0 Application

LIFT 2.0 Program Design

The cornerstones of MCE's program proposal:

- Adjust income eligibility threshold to 60% Area Median Income ("AMI")
- Layering with MCE's MF EE program and leveraging of other programs
- Treat naturally occurring affordable housing in addition to deed-restricted housing, while maintaining affordability

LIFT 2.0 Program Design

The cornerstones of MCE's program proposal:

- Local governments as trusted messengers on targeted customer outreach
- Energy efficiency measures with a focus on health, safety and comfort, including heat pumps and Demand Response enabled technologies.
- Choice in contractor and equipment.

Measure Selection

- Energy efficiency
- Non-resource (health, safety and comfort)
- Fuel substitution (electrification)
- Measures and education to assist customers with Time of Use rate transition (grid enabled water heaters, smart thermostats)

Program Coordination

- The program would take on core administrative functions for the Green and Healthy Homes Initiative
- MCE MF EE program would layer on top to achieve deeper energy retrofits
- Collaboration with non-EE programs:
  - Solar on Multifamily Affordable Housing (SOMAH)
  - DAC Community Solar/Green Tariff
  - Self-Generation Incentive Program (SGIP)
  - MCE's electric vehicle programs

Table 1- Affordable Housing Properties by County

County/City	SOMAH database		County Data		Other Housing Data	
	Properties	Units	Properties	Units	Properties	Units
Marin	48	2251	N/A	3663	69	3237
Contra Costa	133	11922	169	15008	155	14710
Napa	23	1710	57	N/A	25	1588
Unincorporated Solano	0	0	N/A	N/A	0	0
Benicia	1	55	2	155	2	131

Affordable Housing by County

Table 2 - Annual Energy Savings Targets

	PY1	PY2	PY3	PY4	PY5	PY6	Total
kWh	118,500	284,400	402,900	426,600	426,600	426,600	2,085,600
kW	32.5	78	110.5	117	117	117	572
therms	149,18	35,802	50,719.50	53,703	53,703	53,703	262,548

Table 3 - Annual Unit Targets

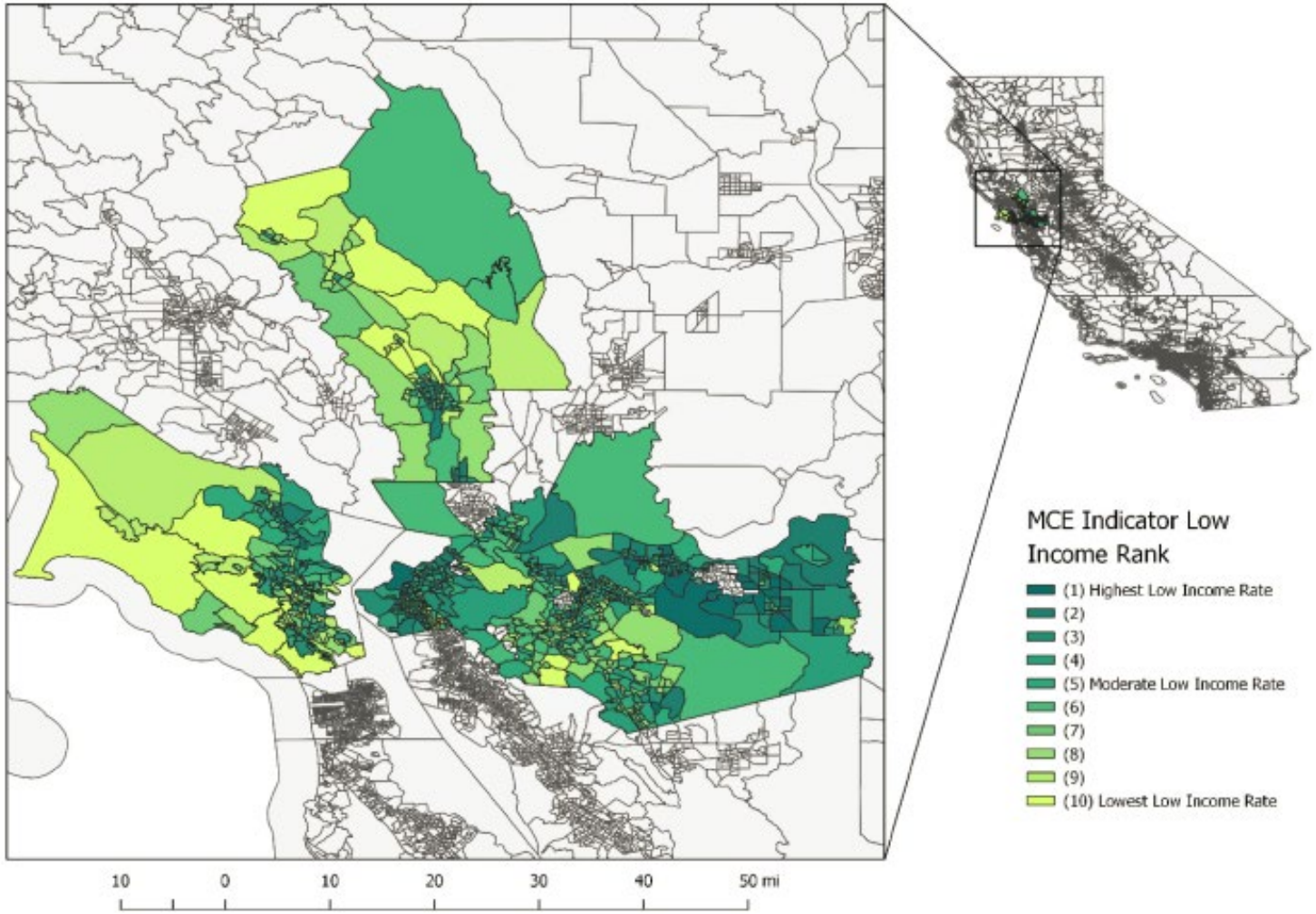
	PY1	PY2	PY3	PY4	PY5	PY6	Total
Unit Targets	250	600	850	900	900	900	4,400

Savings and Unit Participation

Table 4 - Proposed LIFT 2.0 Budget

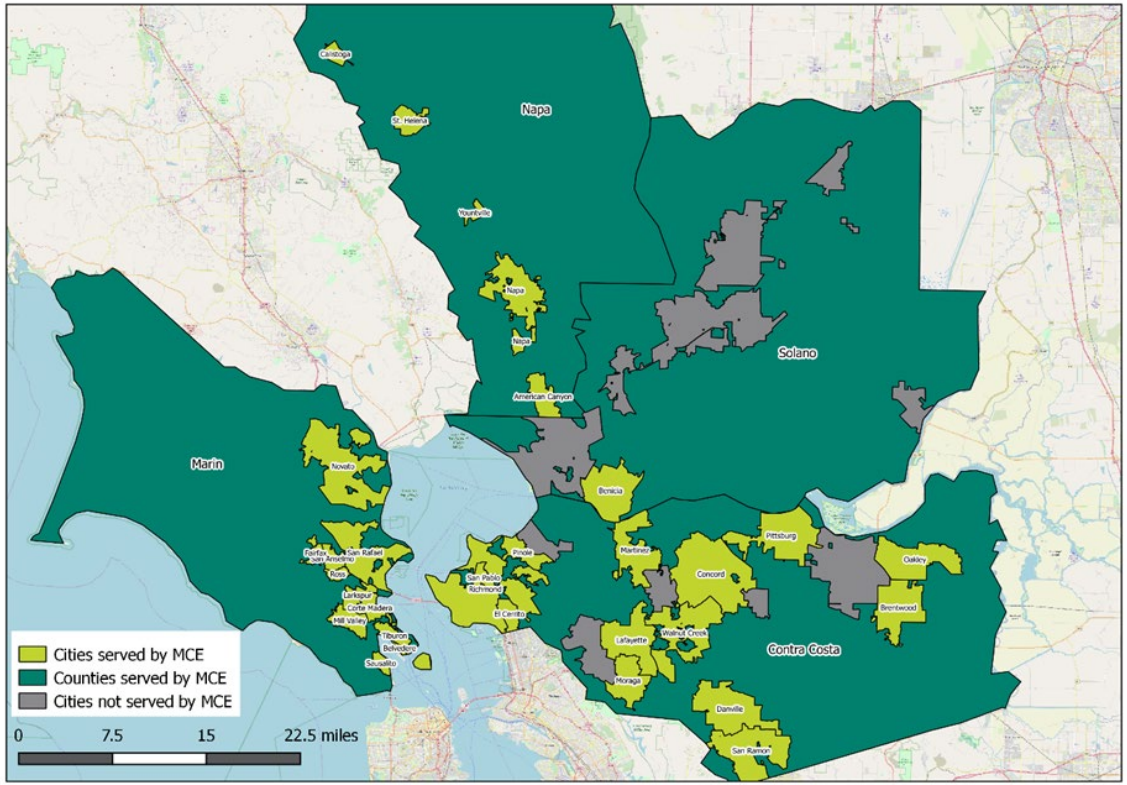
	PY1	PY2	PY3	PY4	PY5	PY6	Total
Incentives/EE	$375,000	$900,000	$1,275,000	$1,350,000	$1,350,000	$1,350,000	$6,600,000
Implementation	$225,000	$245,000	$266,800	$290,564	$316,471	$316,766	$1,660,601
General Admin	$125,000	$135,000	$145,800	$157,464	$170,061	$183,666	$916,991
Marketing	$48,333	$85,333	$112,507	$119,869	$122,435	$123,362	$611,839
EM&V	$32,222	$56,889	$75,004	$79,912	$81,624	$82,241	$407,893
Total	$805,556	$1,422,222	$1,875,111	$1,997,809	$2,040,591	$2,056,036	$10,197,325

Proposed Budget


MCE Indicator Low Income Rank
(1) Highest Low Income Rate
(2)
(3)
(4)
(5) Moderate Low Income Rate
(6)
(7)
(8)
(9)
(10) Lowest Low Income Rate
10
0
10
20
30
40
50 mi

Program Targeting

While all income qualified customers in MF properties would be eligible, MCE is planning on incorporating targeted outreach to certain customer groups



Feedback, Comments, Questions

Thank You

MCE Director of Customer Programs
Ahavenar-daughton@mceCleanEnergy.org

11. ESA Multi-Family Single Administrator Issue

Lunch

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

13. Update on Solar on Multifamily Affordable Housing (SOMAH) program

SOMAH

SOLAR ON MULTIFAMILY AFFORDABLE HOUSING

Program Overview

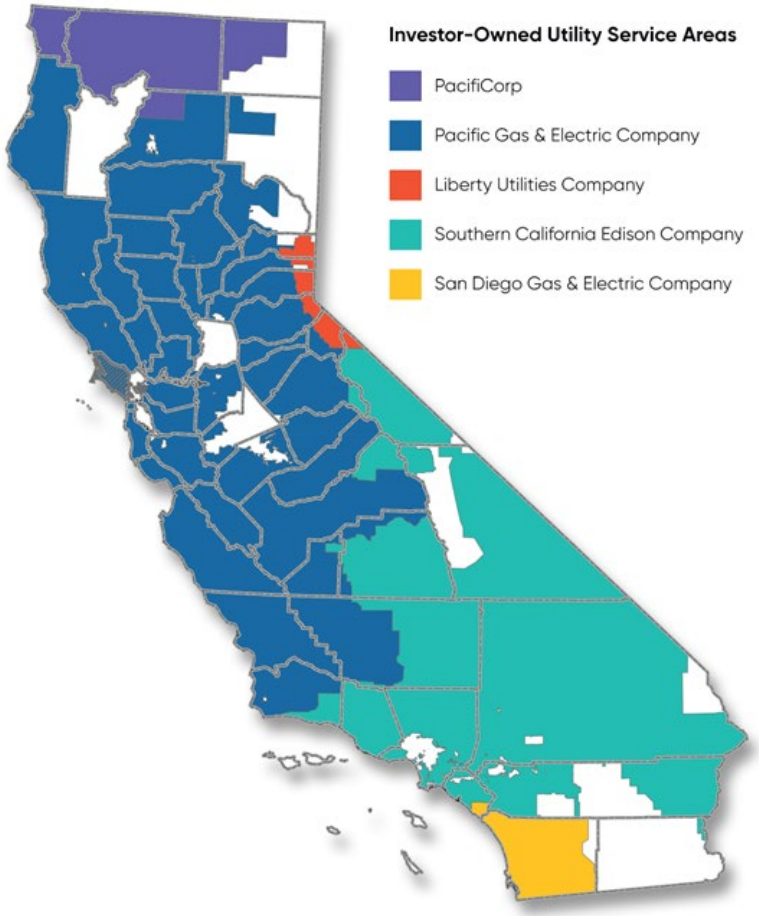
Jae Berg
SENIOR MANAGER

Program Overview & Updates

SOMAH

Program Overview & Updates
Program Summary

- Provide financial incentives to install 300 MW of solar PV on affordable housing in California
- $100 million annual budget allocated by investor-owned utilities (IOUs) from shared greenhouse gas (GHG) auction proceeds
- Participating IOUs: Pacific Gas & Electric, Southern California Edison, San Diego Gas & Electric, PacifiCorp and Liberty



Program Overview & Updates
Program Summary

- Focus on tenant benefit
  - At least 51% of the energy produced by the PV system must be allocated to the tenants
  - Tenants must receive 100% of the economic benefit of the solar credits
  - Rents or utility allowances are not allowed to be adjusted based on the solar credits
- Community-based approach
  - Contracted with 4 Community-Based Organizations
- Technical assistance
  - Provide TA to property owners and contractors at no cost

Program Overview & Updates
Program Summary

- Competitive bidding process
  - Online bidding tool and standardized bid template
- Energy efficiency
  - Encourage EE by capping the incentive
  - Promote the ESA program
- Workforce development
  - Encourage local and targeting hiring, along with tenant job trainees
- Tenant education
  - Required materials available in English, Spanish, and Chinese

Program Overview & Updates
Engagement Highlights

- SOMAH Program Handbook
  - Public workshop and stakeholder commenting period
- Annual Marketing, Education, and Outreach Plans
  - Public commenting period
- Participant webinars
  - Contractor Eligibility Training, Intro to SOMAH for Property Owners, Bidding Tool Resources, Solar Sizing Tool, Workforce Development
- Advisory Council
  - Quarterly meetings with the SOMAH PA
- Workforce Development
  - Partnership with Rising Sun Center for Opportunity
  - Job Training Task Force kickoff in November 2019

Program Overview & Updates
Resources – Program Website

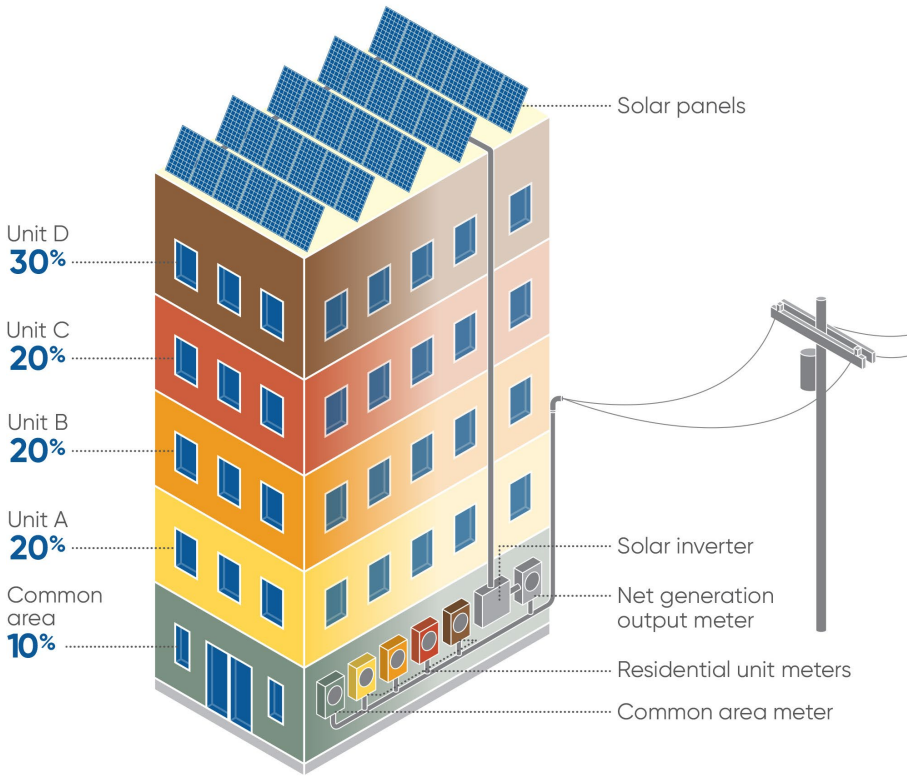
- Eligibility requirements
- Focused user experiences for property owners, contractors, tenants, and job seekers
  - Application guide & resources
  - Spanish and Chinese translations
  - Toolkits
- Bidding tool for property owners
- Job training portal for contractors and job seekers
- Energy auditors database
- California Distributed Generation Statistics

Program Overview & Updates
Program Launch - Day 1

Utility Territory	# of Applications Received	# of MW	Requested Funding ($)	Total Incentive Budget
Pacific Gas & Electric	98	29.89 MW	$66,170,677	$45,430,101
Southern California Edison	84	26.16 MW	$55,793,631	$42,482,704
San Diego Gas & Electric	44	14.19 MW	$30,961,988	$9,270,000
PacifiCorp	0	0 MW	$0	$1,743,854
Liberty Utilities	0	0 MW	$0	$390,768
Totals	**226**	**70.23 MW**	**$152,926,296**	**$99,317,427**

Current Application Statistics

- 118 active applications
  - With 11,686 tenant units
- 137 applications on the waitlists
  - With 9,975 tenant units
- 92.5% of the solar credits allocated to the tenants
  - 7.5% of solar credits allocated to the common spaces
- 7 participating contractors
  - With over 120 eligible contractors
- Average system size of 292 kW
  - As compared with 77 kW seen in MASH
- 6 Track A applications
  - Applications that opt-in to technical assistance



Program Overview & Updates
Current Application Statistics

Utility Territory	**# of Active Applications**	**# of Waitlist Applications**
Pacific Gas & Electric	53	59
Southern California Edison	52	41
San Diego Gas & Electric	12	36
PacifiCorp	0	0
Liberty Utilities	0	0
Totals	**117**	**136**

SOMAH & ESA Interaction

SOMAH

SOMAH & ESA Interaction
Implicit Program Goals

- Assess and address in-unit and common area EE opportunities before solar installation
- Maximize the benefits of the solar credits to the residents and affordable property owners
- Encourage co-enrollment in complementary EE Programs like ESA

SOMAH & ESA Interaction
Direct Referrals

- Referrals to the Energy Savings Assistance program is a SOMAH Program Requirement
- Applicants provide a list of resident addresses (street address and unit numbers) with Reservation Application

SOMAH & ESA Interaction
Direct Referrals

- SOMAH PA also offers technical assistance to any Applicant or resident who would like to learn more about energy efficiency programs available in their service territory
- Property Owner and Resident Referrals to the ESA Single Point of Contact

SOMAH & ESA Interaction
Education

Participants also are required to

- Post the ESA Program outreach materials on site

OR

- Distribute the materials directly to the residents

SOMAH & ESA Interaction
Energy Efficiency Compliance Milestone

- Within 60 days of Incentive Reservation, all projects must submit
  - Solar Sizing Tool
  - Evidence of recent Energy Efficiency upgrades OR an Energy Audit Report

SOMAH & ESA Interaction
Energy Efficiency Compliance Milestone

- Solar Sizing Tool
  - Only measures that are included in ESA will be considered in system sizing for SOMAH
  - The tool will identify eligible measures specific to each IOU territory and existing building conditions

STEP 1: COMPLETE PROPERTY CHARACTERISTICS FORM		
PROJECT SITE INFORMATION		
Powerclerk Application Number	PGE-123456	
Property Name	Sunny Skies Apartments	
Property Address	123 Main Street	
Property City	Stockton	
Property Zip Code	95201	
Property Climate Zone	12	
Workbook Author Name	Jane Auditor	
Workbook Author Title	Energy Efficiency Consultant	If other please specify
Credential (If Energy Consultant)	California HERS Whole House Rater	
Credential Number	123-456-ASD	
Property Owner's Organization	Affordable Housing Group	
Property Primary Contact Name (Signatory)	John Owner	
Primary Contact Phone	555-555-5555	
Primary Contact Email	jo@ahg.org	
Electric Utility	PG&E	
Gas Utility	PG&E	

SOMAH & ESA Interaction
Wrap-Up

- SOMAH PA is looking to partner with the IOUs and ESA contractors to leverage this complementary no-cost resource
- Program is designed to encourage co-leveraging
- Open to ways to continue to maximize this partnership to meet both program goals
  - Streamlining enrollment
  - Referrals
  - Direct engagement with ESA Contractors

Thank you!

SOMAH

Email: **contact@CalSOMAH.org**

Web form: **CalSOMAH.org/contact-us**

General hotline: **858-244-1177 ext. 5**

Tenant hotline: **800-843-9728**

14. Investor Owned Utilities ESA/CARE Status Reports

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
Total	**$42,793,655**	**$22,930,676**		**$973,515,436**

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
Total	**16,899,262**	**4,786,168**		**4,458,490**		**650,366**

* 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.

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CARE Program *CARE Penetration map*

Pacific Gas and Electric Company

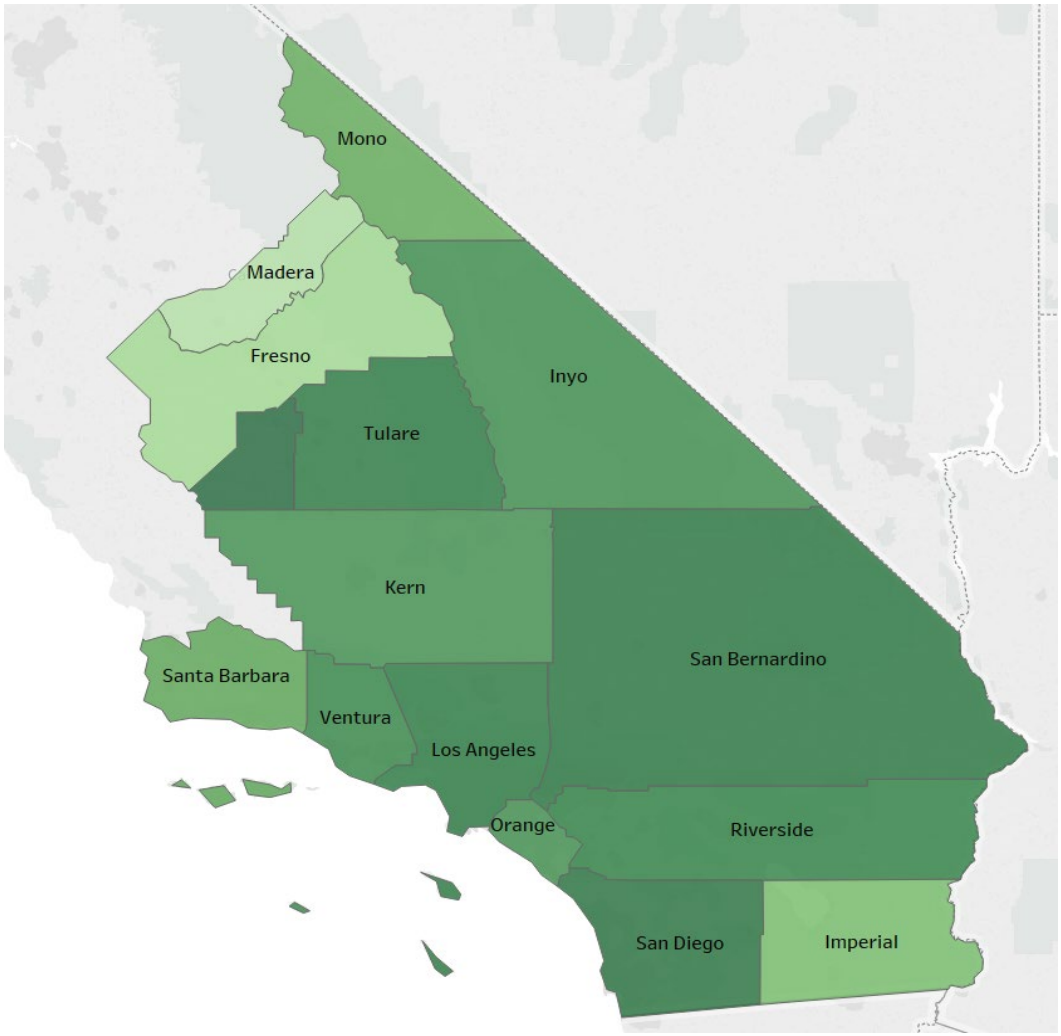
PG&E

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

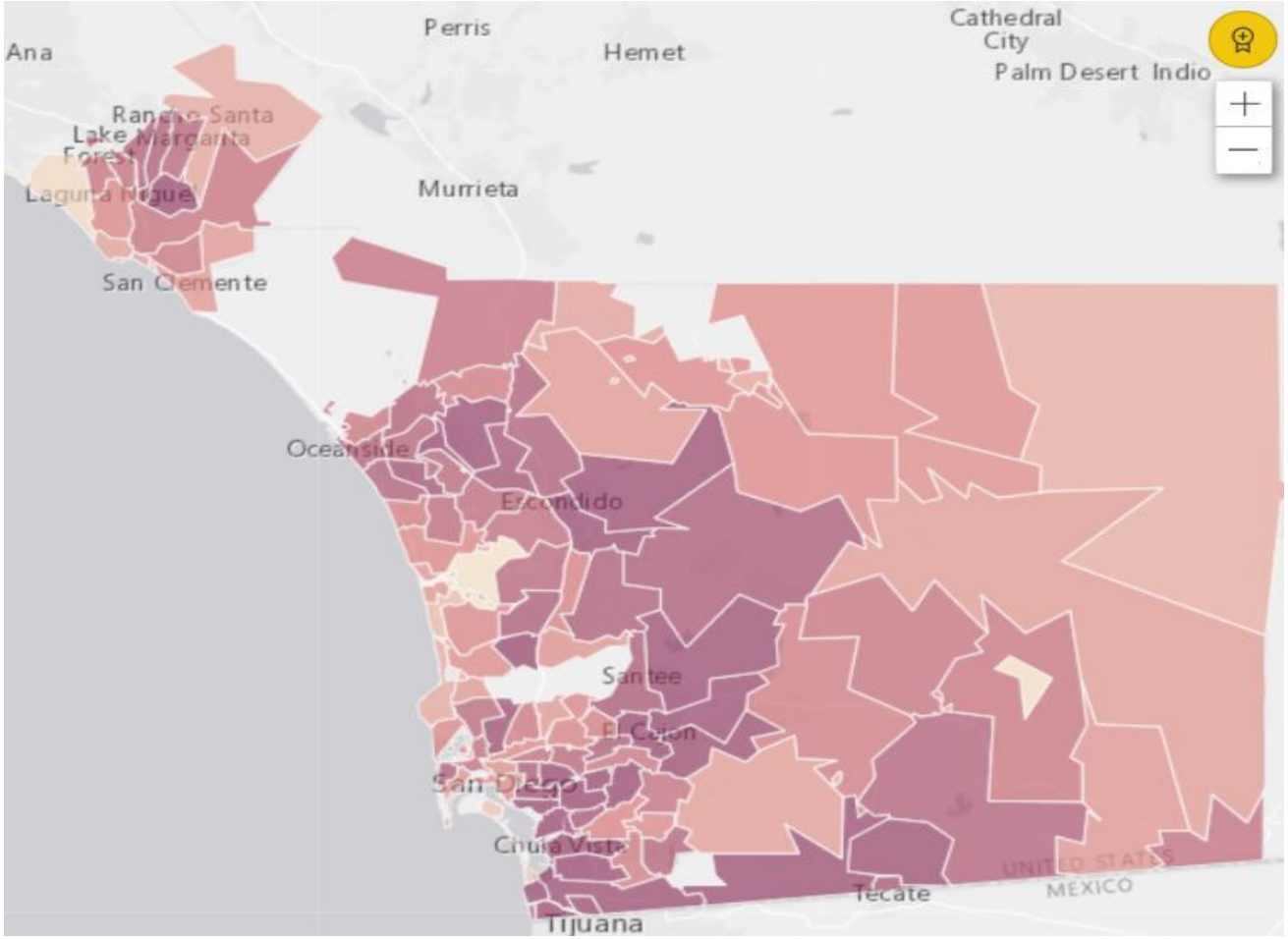


County	Penetration Rate*
Kings	107%
San Bernardino	99%
Tulare	94%
Los Angeles	93%
Riverside	89%
Ventura	81%
Inyo	75%
Orange	75%
Santa Barbara	52%
Mono	47%
Imperial*	36%
Kern	29%
Fresno*	8%
San Diego	0%
Madera*	0%

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

CARE Program *CARE Penetration map*

SDG&E

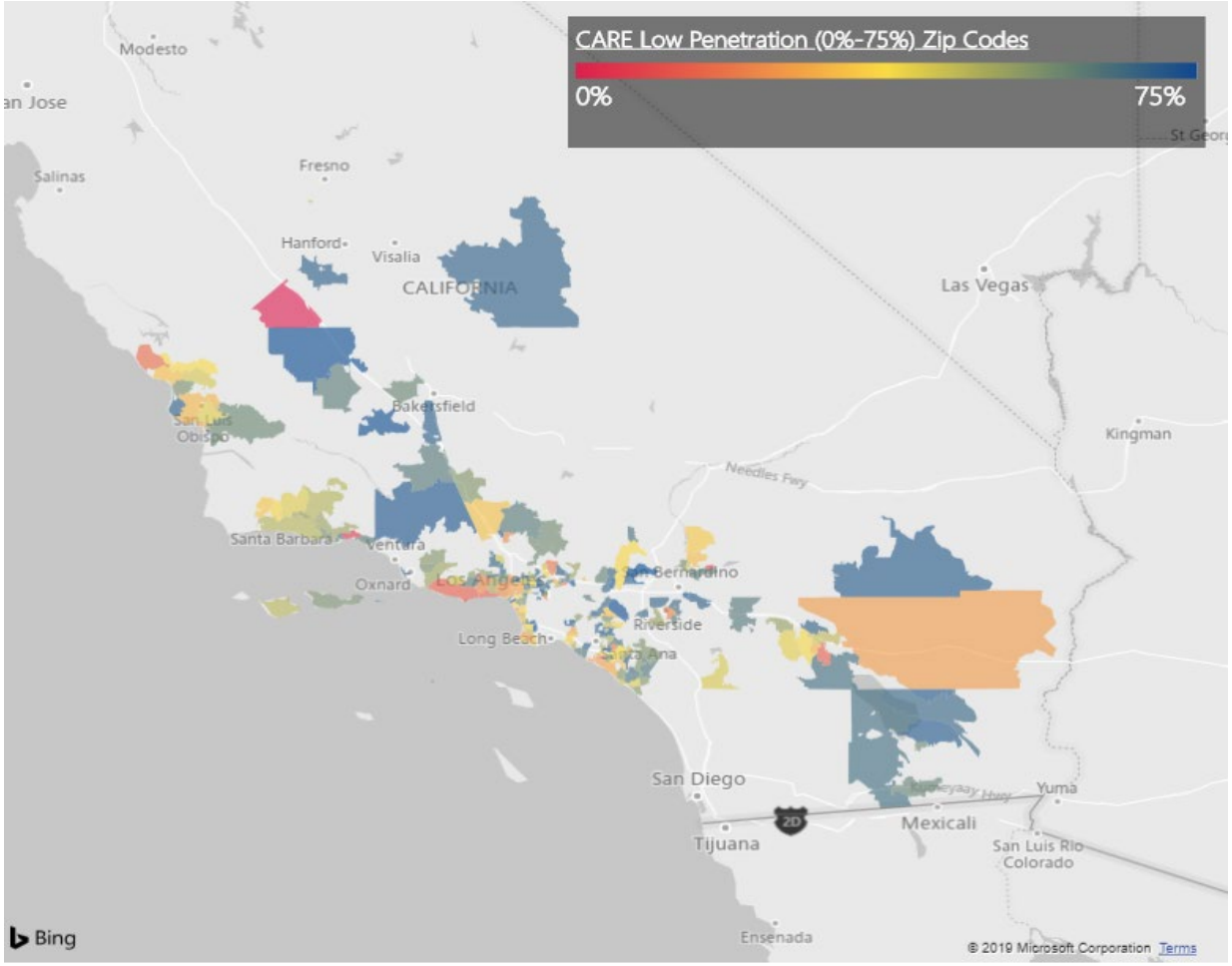


City	Penetration Rate*
Rancho Santa Fe	7.3%
Mount Laguna	10.1%
Laguna Beach	13.4%
Coronado	25.7%
Del Mar	28.8%
Borrego Springs	36.9%
La Jolla	38%
Palomar Mountain	39.1%
Trabuco Canyon	42.1%
Pala	43.2%
Dana Point	44.4%
Jamul	48.2%

*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 [1]**	**YTD Expenditures [2]**	**%**
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%
Total	**$591,202,886**	**$281,197,267**	

[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.

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

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Energy Savings Assistance Program

2019 YTD Energy Savings Targets

2019 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	49,001,646[4]	(308,084)[4]	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
TOTAL	**92,531,139**	**123,335**	**N/A**	**N/A**	**N/A**	**N/A**	**92,730,000**	**8,830,000**

[1] 2019 through September 30, 2019, as reported in the IOU ESA-CARE Monthly Report (filed October 21, 2019).

[2] Derived from average CARE Customers Usage for PY 2018 (Annual Report CARE Table 9) multiplied by 2019 September homes treated and annualized.

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

[4] 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.

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Energy Savings Assistance Program

Top Two Drivers for Energy Savings Shortfalls below Target	
IOU	**Drivers**
PG&E	1. PG&E is forecasting to meet ESA's kWh target. 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	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. 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.
SoCalGas	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. 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.
SDG&E	1. Homes treated number are lower than expected. Challenges with contractor workforce and outreach challenges. 2. Lower than forecasted installation rates for certain measures due to feasibility of installation.

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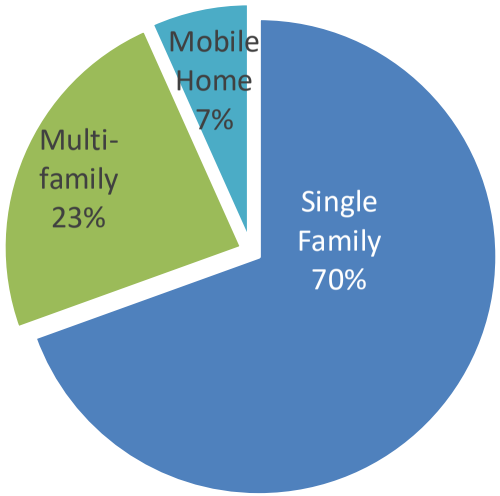
Energy Savings Assistance Program

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 [1]						
Utility	**Annual Goal**	**First Touch**	**Go-Backs**	**Total**	**Total as % of 2019 Goal**	**Total as % of Eligible ESA HH [2]**
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%
Total	**403,117**	**123,358**	**98,274**	**221,632**		

[1] 2019 through September 30, 2019, as reported in the IOU ESA-CARE Monthly Report (filed October 21, 2019).

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

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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 how 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 additional 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

Pacific Gas and Electric Company

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Tribal Activities

IOU	Federally-Recognized Tribes	Activities
PG&E	51	In addition to outreach and communication with the 11 priority tribes, PG&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&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. 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&E's service area. The penetration rate is updated every quarter.
SCE	12	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.
SoCalGas	20	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 Lightening 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.
SDG&E	19	Since January of 2019, SDG&E has attended 11 tribal events and presentations reaching over 700 people. The Tribal partners of our Energy Solutions Partner Network have shared SDG&E messaging via social media and email reaching over 13,000 people.
Total	**102**	

Energy Savings Assistance Program

Pacific Gas and Electric Company

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

SOUTHERN CALIFORNIA EDISON
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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 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 Prepardness 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 Prepardness 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
A Sempra Energy utility

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

Energy Division – Requirements for Unspent Funds

Staff Briefing for the Low Income Oversight Board (LIOB) Meeting

December 10th, 2019

Energy Division
California Public Utilities Commission (CPUC)

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

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

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

2009-2015 Unspent Funds

- Significant unspent funds, from the 2009-2015 ESA Program years, resulted in necessary changes and enhanced reporting, monitoring, and tracking unspent Program funds.

- Unspent funds resulted from:
  - Budget carry over from prior years,
  - Estimates and authorizations that exceeded actual expenditures over time,
    - Overestimates based on the maximum level of program activity possible.

- The size of the carry-over budgets, $400M combined, raised the question of why funds were not being spent, and whether the program focus or rules should be recalibrated to enable spending to achieve statutory objectives

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

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

Current Fund Shifting Rules and Examples

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

Going Forward

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

Definitions and Clarifications

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

Joint IOU's Unspent Funds for Energy Savings Assistance Program

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

Energy Savings Assistance Program *Unspent/Uncommitted ESA Fund*

PG&E Remaining Uncommitted 2009-2016 Unspent Funding

Committed 2017-2020 ESA Unspent Funding			
Year	Authorized Unspent Funding [1]	YTD Expenditures [2]	Remaining Committed Unspent Funding [4]
2017	$2,377,763	$2,377,763	$0
2018	$18,570,835	$2,477,114	$16,093,721
2019	$43,600,229	$1,826,402	$41,773,827
2020	$59,329,898		$59,329,898
Total	**$123,878,724**	**$6,681,279**	**$117,197,445**

Remaining Uncommitted 2009-2016 Unspent Funding[3]		
Principal	Interest	Total
$55,472,296	$12,863,247	$68,335,543

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

[2] 2017-2018 ESA expenses from 2017-2018 ESA-CARE Annual Reports, filed May, 1 2018 and 2019. 2019 is YTD through September 30, from ESA-CARE Monthly Report for September, 2019, filed October 21, 2019. These funds are shown in ESA Table 1A of PG&E's Monthly and Annual ESA-CARE Reports.

[3] PG&E's remaining uncommitted unspent 2009-2016 funding will be used to offset collections that would otherwise have been required in this program cycle, as directed by D.17-12-009, OP.137, and will be depleted by 2021. This funding is through September 30, 2019, and includes an average annual interest rate of 2.5%.

[4] Unspent funding at year-end is carried forward to following years in the same cycle.

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Energy Savings Assistance Program *Unspent/Uncommitted ESA Fund*

SCE Remaining 2009-2016 Unauthorized Unspent/Uncommitted Funds

PY 2017-2020

	Authorized			Spent [3]			Remaining [4]		
	Annual Budget [1]	Unspent-Uncommitted from 2009-2016 [1] [2]	Total	Annual Budget	Unspent-Uncommitted from 2009-2016	Total	Annual Budget	Unspent-Uncommitted 2009-2016	Total
PY 2017	$ 59,601,019	$ 11,139,809	$ 70,740,828	$ 61,045,978	$ 74,978	$ 61,120,956	$ (1,444,959)	$ 11,064,831	$ 9,619,872
PY 2018	$ 61,919,683	$ 17,186,772	$ 79,106,455	$ 64,849,390	$ 2,968,328	$ 67,817,718	$ (2,929,707)	$ 14,218,444	$ 11,288,737
PY 2019	$ 63,616,662	$ 19,655,599	$ 83,272,261	$ 58,695,412	$ 9,026,662	$ 67,722,074	$ 4,921,250	$ 10,628,937	$ 15,550,187
PY 2020	$ 65,067,100	$ 20,183,403	$ 85,250,503	$ -	$ -	$ -			$ 85,250,503
Total	***$ 250,204,464***	***$ 68,165,583***	***$ 318,370,047***	***$ 184,590,780***	***$ 12,069,968***	***$ 196,660,748***	***$ 546,584***	***$ 35,912,212***	***$ 121,709,299***

[1] Authorized Budget throught Resolution E-4885
[2] Authorized Budget through AL 3824-E
[3] Annual spent reflected is through 9/30/2019
[4] Remaining authorized Unspent-Uncommitted thru 2020
SCE does not anticipate having any remaining 2017-2020 Unspent-Uncommitted funds at the end of the cycle

PY 2009-2016

2009-2016 Unspent-Uncommitted fund as of 1/1/2017	$ 124,383,309	[a]
Balance from 2009-2016 Authorized to Spend for 2017-2020	$ 68,165,583	[b]
Balancing Account Interest	$ 5,812,422	[c]
2009-2016 Remaining Unspent-Uncommitted Fund	$ 62,030,148	[a]-[b]+[c]
Bridge Funding Budget Proposal Advice Letter 4053-E	$ 40,926,750	[d]
Remaining unauthorized Unspent-Uncommitted funds	**$ 21,103,398**	[a]-[b]+[c]-[d]

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

SDG&E Remaining Unspent Uncommitted Funds

	Total ESA (Table 1 + 1A)		
	Authorized Budget [1]	**Spent**	**Remaining**
PY 2017 [2] [3]	$34,313,691	$17,996,715	$16,316,976
PY 2018 [2] [3]	$33,744,223	$22,896,182	$10,848,041
PY 2019 [4]	$34,652,791	$13,541,011	TBD
PY 2020	$35,509,153	TBD	TBD

	Total ESA (Table 1 + 1A)			
	Revenues Collected in Rates	**Interest Earned**	**Program Year Expenditures**	**Current Year Unspent, Uncommitted, Collected**
PY 2009-16 [5]				$10,362,880
PY 2017 [6]	$22,351,356	$256,588	$17,485,110	$5,122,834
PY 2018 [6]	$31,323,325	$655,589	$23,347,010	$8,631,904
PY 2019 Amortization [2]				($20,000,000)
Remaining Unspent Uncommitted Funds				**$4,117,618**

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

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

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

[4] Expenses reflected through 9/30/2019.

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

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

Energy Savings Assistance Program *Unspent/Uncommitted ESA Fund*

SoCalGas Remaining Unspent Funds

	Authorized Annual Budget [1]	Spent [2]	Unspent [3]
PY 2017	$ 138,130,301	$ 79,364,204	$ 58,766,097
PY 2018	$ 198,805,587	$ 94,492,552	$ 104,313,035
PY 2019	$ 208,099,969	$ 77,551,774	
PY 2020	$ 216,861,913	$ -	
Total	$ 761,897,770	$ 251,408,530	$ 163,079,132

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

[2] Annual spend for PY 2017 and 2018. PY 2019 spend amount is year-to-date through September.

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

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

Energy Savings Assistance Program *Unspent/Uncommitted ESA Funds*

Top Two Drivers for Unspent Funds

IOU	Drivers
PG&E	1. Authorized PY2017-18 (Table 1) Unspent Funds were carried forward to 2019: ESA budget under spent due to not meeting homes treated goals in 2017-2018, and over estimation of measures to be installed. We've onboarded additional contractors and anticipate addressing the delta in homes treated in 2019 and 2020. 2. 2009-2016 Unspent Funds committed for ESA 2017-2020 through Conforming and Mid-Cycle Advice Letters (Table 1A): 1. Delayed launch of new measures pending 2018 Mid-Cycle Advice Letter Filing Resolution. 2. Delayed start installing measures for MultiFamily Common Area Measure (CAM) as a result of transitioning to a deemed measures program based on options provided by Energy Division; this spend will shift to 2020. 3. Remaining Uncommitted 2009-2016 Unspent Funding: This is being used to offset 2020 collections that would otherwise have been required in this program cycle, per D.17-12-009, OP.137, and will be spent by 2021.
SCE	1. Remaining "first touch" eligible population is much smaller and harder to reach. Mitigation strategies to improve participation rates have been initiated (e.g. adding assessment agencies for HTR customers). 2. Inaccurate assumptions on customers Willingness & Feasible to Participate. Customers have been marketed to, but still choose to not enroll despite the program benefits. 3. So far, limited opportunities to leverage with CSD. Current projects have few potential measures that SCE can reimburse CSD for.
SoCalGas	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. 2. Lower forecast rates of feasibility for some of the program measures.
SDG&E	1. Over estimation of measure to be installed. 2. Lower than projected homes were weatherized after receiving the initial treatment.

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

2021 – 2026 Low Income Programs Application

Summary of Proposed Changes

LIOB Meeting
December 10, 2019

Together, Building
a Better California

Summary of PG&E Requests

ESA Program

- Budget - $1.1 billion for total program cycle
  - Multi-family budget portion is $262.6 million
- Refresh program design to achieve energy savings, and improve health, comfort and safety for the most needy customers

CARE/FERA Program

- Budget - $4.3 billion
- Maintain CARE participation at 90 percent of eligible population and increase FERA participation

ESA Key Policy Changes

- Flexibility to make more ESA program adjustments (fund shifting and ESA measure modifications) during program cycle via regulatory reports
- ESA Working Group should be established to discuss program changes

New ESA Plus Program Structure

	Single Family/Mobile Home			Multi-Family
	BASIC Income self-certification and no property owner approval	**COMPREHENSIVE** Standard Program	**COMPREHENSIVE PLUS** Targeted Segments	**Multi-Family Whole Building (MFWB) Plus Program**
Objective	Easy way to get started with guaranteed services, reduce barrier of unwillingness	Provide offers/services for low – moderate energy users to help reduce use and increase health, safety and comfort	Provide unique offers/services to customer with greatest needs	Deed and Non-Deed restricted buildings - Third Party Administrator; Procurement Review Group and Independent Evaluator
Customer Opportunity	CARE customer - not ESA treated New CARE enrollments annually	CARE customers, not ESA treated New CARE enrollments annually	NEED STATES are: High Usage Electric and Gas, Medical Baseline, Disconnected, DAC/Tribal/Rural, Wildfire Threat	Buildings with 65% of tenants ESA eligible Low Income MF households
Measures	Simple Energy Savings Measures • LED Lighting • Power Strips • Energy Education	Energy Savings & HCS • HVAC added Prescriptive Duct Test & Seal Portable A/C, Furnace Repair/Replacement for Renters • Domestic Hot Water added Water Heater Repair/Replacement for Renters • Miscellaneous added Pool Pumps • Enclosure • Lighting • Refrigerators & Clothes Washer • Energy Education	Comprehensive Measures PLUS For High Usage: • Diagnostic Driven Air Sealing • Floor Insulation • Air Purifier • Portable A/C • Energy Education (Tools) • Air Purifier (no Rural) • Portable A/C • Minor Home Repair Plus • Cold Storage	TBD based on Third Party solicitation to include CAM, in-unit measures, SPOC

ESA 2021- 2026 Participation Goals – Homes Treated

TABLE I-12
PROPOSED ESA PROGRAM PARTICIPATION GOALS FOR PROGRAM YEARS

Customer Type	PY 1 (2021) Continue Current Program	PY 2 (2022) New ESA Plus Program Begins	PY 3 (2023) ESA Plus Program Minus Multi-Family Units	PY 4 (2024) Established ESA Plus Program	PY 5 (2025) Established	PY 6 (2026) Established
DAC,Tribal, Rural (includes California Air Resources Board (CARB))	40,701	36,639	28,110	25,524	24,630	23,767
Need States	15,100	13,593	11,174	10,146	9,790	9,447
All Others	20,849	18,768	30,992	28,139	27,154	26,203
Total Participation (Homes Treated)	76,650	69,000	70,276	63,809	61,574	59,417

ESA Cost Effectiveness Test Results

PG&E targets an average ESACET score of .70 for the program cycle at the portfolio level.

Program Year	2021	2022	2023	2024	2025	2026
ESACET Score	.59	.66	.71	.75	.79	.84

Vs.

Estimated average ESACET for program cycle 2017 – 2020: .94

The cost effectiveness score is a compilation of program costs, energy savings, and non-energy benefits.

ESA Program Implementation - Milestone Gantt Chart

ESA 2021-2026 Milestone Gantt Chart			2021				2022				2023				2024				2025				2026			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed General Administration Budget (Table A1)			$2,177,278	$2,177,278	$2,177,278	$2,177,278	$2,249,233	$2,249,233	$2,249,233	$2,249,233	$2,075,195	$2,075,195	$2,075,195	$2,075,195	$2,072,793	$2,072,793	$2,072,793	$2,072,793	$2,122,128	$2,122,128	$2,122,128	$2,122,128	$2,176,053	$2,176,053	$2,176,053	$2,176,053
		Proposed Contract Budget																								
ESA Plus	ESA Plus Solicitation Initiated/ Completed					X																				
	ESA Plus Launch						X																			
MFWB	MFWB Solicitation Initiated			X																						
	MFWB Solicitation Completed								X																	
	MFWB Launch										X															
Virtual Energy Coach Pilot	Virtual Energy Coach Pilot Launch & Execution	$1,300,000				X																				
	Virtual Energy Coach Pilot Final Report																X									
Mid Cycle AL	Mid Cycle Advice Letter Submitted																X									
LTC Pilot	LTC Pilot Launch & Execution	$275,000																X								
	LTC Pilot Final Report																			X						
LINA Study(s)	LINA 2025 Study Initiated	$150,000									X															
	LINA 2025 Study Launch & Execution														X					X						
	LINA 2025 Study Final Report																					X				
	LINA 2028 Study Initiated & Pre-Esection Work																									X
Impact Evaluation(s)	ESA Plus Impact Evaluation Initiated	$450,000						X																		
	ESA Plus Impact Evaluation Launch & Execution											X				X										
	ESA Plus Impact Evaluation Final Report																	X								
	MFWB Impact Evaluation Initiated										X															
	MFWB Impact Evaluation Launch & Execution											X			X											
	MFWB Impact Evaluation Final Report																		X							
CARE/ESA Appl for Next Cycle	ESA Application Submission																				X					

NOTE: Based on CPUC Decision in January 2021

Low Income Programs – Proposed Pilots

Virtual Energy Coach:

- Test concept of “virtual coach” where education and frequent communications will help drive savings with program enrollments and behavioral changes
- Leverage the Load Disaggregation project for customer recommendations and outreach

Long Term CARE Customer:

- Test effectiveness of different outreach and communications to increase ESA participation among long term CARE customers (defined as 10 or more years continuously on CARE).

CARE/FERA Program 2021 - 2026 Proposed Changes

- Change certification period for Non-profit, Ag, Migrant Farm Worker housing facilities from 2 years to 4 years

- Change CARE eligibility estimate filing date from December to February

- Enhance the CBOs outreach:
  - Propose increase capitation program payment from “up to $20” to “up to $30” for new CARE enrollment utilizing more holistic education to include ESA and rate options
  - Propose same payment for new FERA enrollment for agencies participating in the capitation program

Questions?

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SOUTHERN CALIFORNIA EDISON®
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Southern California Edison Company's 2021 Low Income Application

LIOB Application Summary

December 10, 2019 Hanford, CA

Summary of SCE's Requests

- **ESA Program**
  - Budget - $485.6 million
  - Objective: Further the Commission's objectives of offering ESA participants opportunities to reduce GHG emissions, improve energy efficiency, and generate deeper energy savings while meeting the ESA program's health, comfort, and safety goals.
- **CARE/FERA Program**
  - Budget - $63.4 million
  - Objective: Support the Commission's objective of increasing participation in CARE to 90 percent and FERA to 50 percent of all eligible and willing customers.
- **WE&T Program**
  - Budget - $29.7 million
  - Objective: Create job opportunities in low-income communities and DACs.

ESAP Program Structure to Achieve Deeper Energy Savings (2021-2026)

SCE Administration of Existing Measures & Services For Single Family & Mobile Homes		Multifamily Segment
TIER 1 (Standard ESA Package) Single Family/Mobile Home	**TIER 2 (Enhanced ESA Package) Single Family/Mobile Home**	**Transition Multifamily to a Third Party Designed and Implemented program**

• Customers at or below 200% of FPL subject to budget limits
• Prioritize Vulnerable and Hard to Reach Customers, and Disadvantaged Communities
• Measures: LED, Smart Power Strip, Refrigerator, Smart Thermostats, HVAC Maintenance, Portable AC.
• Customized education using Home Education Reports and Post-Installation follow-up
• Coordinate and encourage enrollment with other DSM and Low Income offerings
	• High Usage Customers (300%+ Baseline one time in last 12 months)
	• Prioritize Vulnerable and Hard to Reach Customers, and Disadvantaged Communities
	• Use load disaggregation data
	• Measures: HP Central AC, HP Water Heating, Dishwashers, Pool Pumps, Attic insulation
	• Customized education and engagement. Implement behavioral programs.
	• Coordinate and encourage enrollment with other DSM and Low Income offerings
		• The Multifamily Whole Building Energy Efficiency program will include:
		  ○ In-dwelling units for Deed and Non-Deed Restricted Properties
		  ○ Common Area Measures Limited to Deed Restricted Properties
		• Outsource all activities with the exception of Single Point of Contact (SPOC)
		• Encourage third-party to ensure multifamily program leverage other DSM and Low Income offerings

ESAP Transition Strategy

YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 6
Continue to operate current ESA program until new contracts are awarded. RFP Stage Est. 7-9 Months • RFP Release • Bidder's Conference • Proposals Due • Evaluation & Proposal Selection • Bidder Notification	Close Out Previous Cycle Contracts --------- Launch New Program under New Contracts --------- System Deployment	PROGRAM IMPLEMENTATION			
Negotiations & Contracting Est. 2+ Months • Pricing Review • Finalize Contracts	PROGRAM IMPLEMENTATION				

Assumes CPUC decision by November 2020

ESAP Pilots to Support Statewide Clean Energy Policy Goals

- **Building Electrification Pilot for Low Income Customers in Disadvantaged Communities**
  - Maximize the social and environmental benefits of building electrification. Bundle packages of measures which result in more comprehensive GHG and cost savings reductions.
  - Leverage learnings and best practices from the San Joaquin Valley Pilot. Focus on operational efficiencies and cost control to manage affordability.
- **New Construction Building Electrification Pilot**
  - Provide financial incentives/design support to affordable housing builders for improving beneficial electrification through design assistance, and installation of highly efficient appliances or electrification measures.
  - Opportunity to expand program beyond retrofits and support a significant need for new affordable housing.

CARE/FERA Program Initiatives (2021-2026)

- **Update CARE High Usage Verification Thresholds**
  - Propose to modify CARE high usage income verification requirement from 1 time to 3 times in a rolling 12 months.
  - Continue existing process for customers with monthly usage above 600% BL.

- **Refresh Capitation Agency Structure and expand current activities to focus on cross-promoting other program offerings for low income customers**

- **Build a dedicated CARE/FERA Call Center Operations**

New Income Qualified Program Proposal

- **Workforce and Education & Training**
  - Funding will transfer from EE Balancing Account to ESA Balancing Account upon approval.
  - Focus on extending training opportunities for residents in disadvantaged communities.
  - Curriculum development in conjunction with community colleges, trade schools, universities and other learning institutions.

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Questions?

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2021 – 2026
Low Income Program Application Highlights

Prepared for the Low Income Oversight Board

December 10, 2019

Application Budget Overview

(in millions)	2020 Authorized	2021 Proposed	2022 Proposed	2023 Proposed	2024 Proposed	2025 Proposed	2026 Proposed
Total CARE Subsidy	$ 76.1	$ 120.4	$ 121.6	$ 122.8	$ 124.0	$ 125.3	$ 126.5
Total FERA Subsidy	-	3.0	3.4	3.9	4.4	4.9	5.4
Total Program Subsidies	**$ 76.1**	**$ 123.4**	**$ 125.0**	**$ 126.7**	**$ 128.5**	**$ 130.2**	**$ 131.9**
ESA Energy Efficiency Measures	**$ 25.3**	**$ 20.7**	**$ 20.6**	**$ 24.3**	**$ 27.8**	**$ 29.5**	**$ 31.6**
Total CARE Admin	$ 7.4	$ 6.6	$ 7.2	$ 6.9	$ 7.0	$ 7.4	$ 7.4
Total FERA Admin	-	0.6	0.7	0.6	0.6	0.6	0.6
Total ESA Admin	5.7	7.0	8.9	6.6	6.4	6.9	6.7
Total Program Administration	**$ 13.1**	**$ 14.2**	**$ 16.8**	**$ 14.1**	**$ 14.0**	**$ 14.9**	**$ 14.7**
Total Low-Income Revenue Requirement	**$ 114.4**	**$ 158.3**	**$ 162.4**	**$ 165.1**	**$ 170.3**	**$ 174.6**	**$ 178.3**

2021 – 2026 CARE/FERA Strategy Overview

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Purpose

To continue successful enrollment efforts for CARE and find new avenues for FERA while streamlining program process and technologies to improve lives and create seamless and easy interaction with customers

Key Objectives			
Optimize marketing and outreach based on lessons learned + new capabilities	Streamline delivery and cross promotion	Increase positive perception and promote added value through CBO partnerships	Maintain participation of new and recertified customers

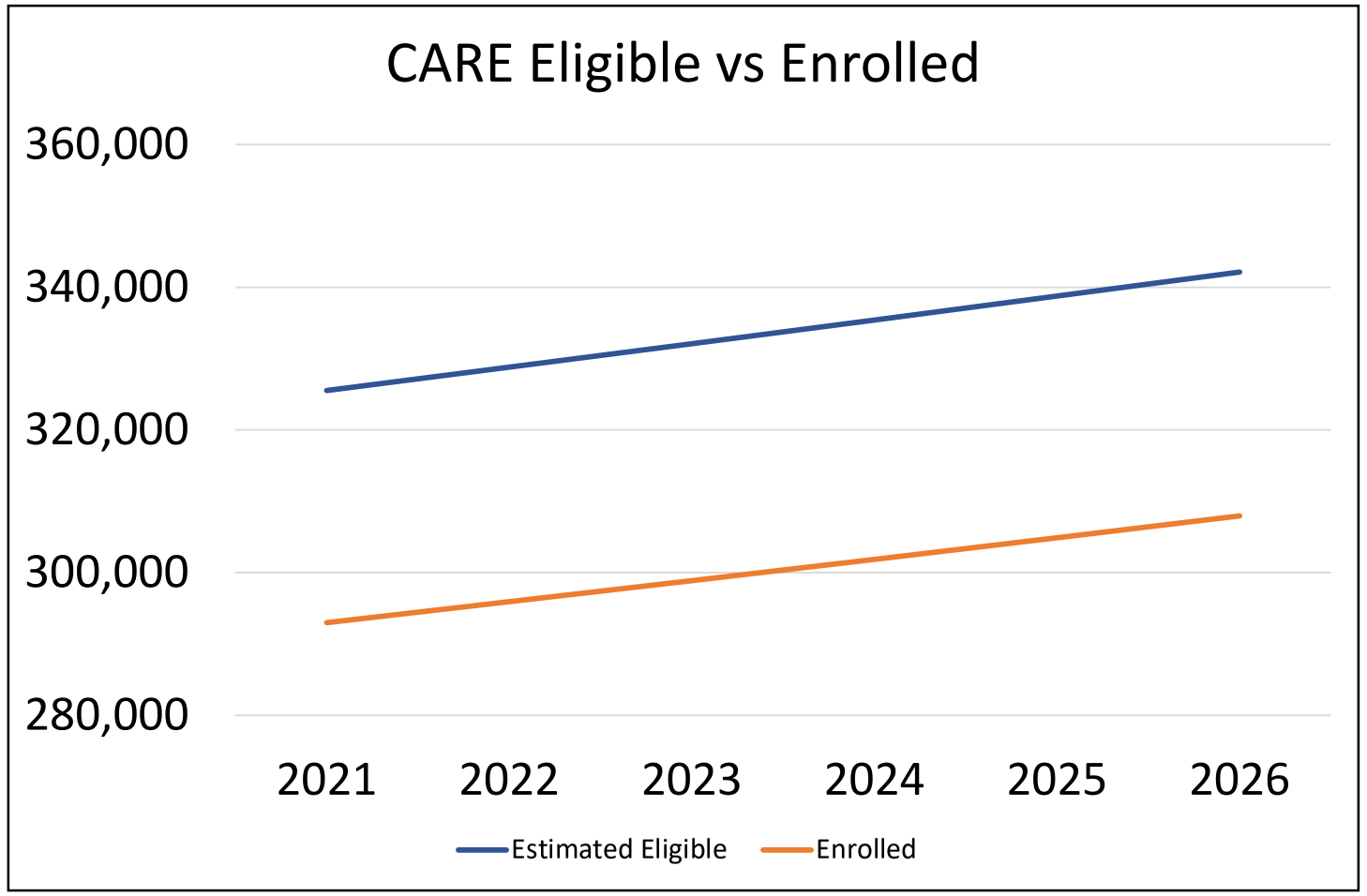
Supporting Policy Changes:

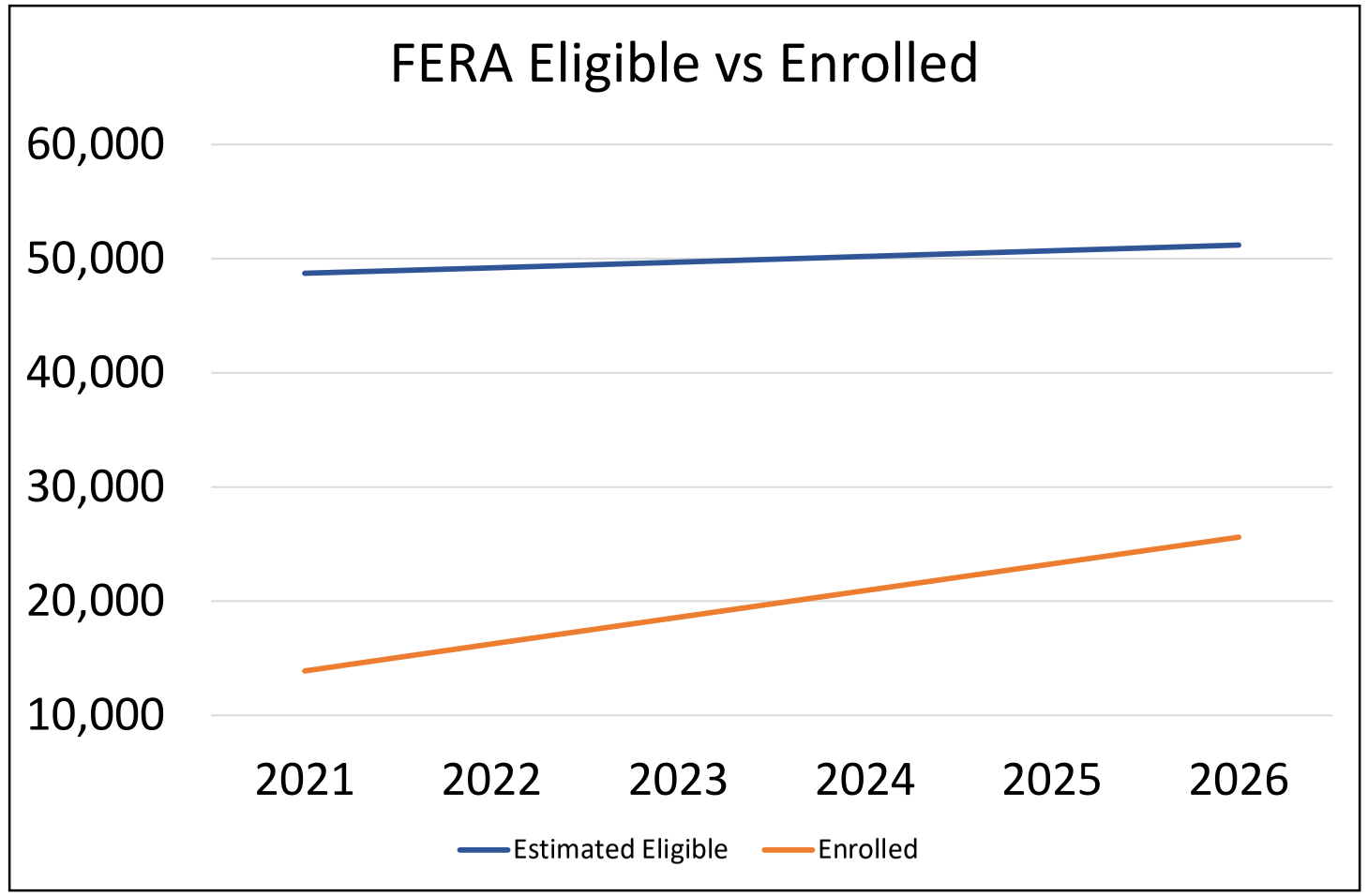
- Modify High Usage PEV to three times in a rolling 12-month period
- Modify recertification of CARE Expansion from 2 years to 4 years
- Transition funding for CHANGES to SDG&E's General Rate Case
- Move annual deadline for program eligibility estimates from December 31 to February 12

Measuring CARE/FERA Performance

Meet Commission Program Enrollment Targets:

- Maintain 90% Penetration for CARE
- Increase to 50% Penetration for FERA





2021 – 2026 ESA Strategy Overview

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Purpose

To find the appropriate blend of energy efficiency and health, comfort & safety to improve customer's lives, reduce greenhouse gas, and decrease energy burden

Key Objectives			
Create tailored offers for customers based on premise, ownership and need	Streamline delivery and promote choices for customers	Increase positive perception and promote added value	Increase participation of new and existing customers

Supporting Policy Changes:

- Delivery of measures via a tiered approach
- A 3rd Party Statewide MFWB Program for Deed-Restricted Properties
- Adding CAM measures to the locally implemented ESA MF program for non-deed restricted properties
- Changing appliance eligibility criteria
- Simplification of fund shifting rules
- Continuing the advice letter process for program changes

Measuring ESA Performance

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Program Goals:

- Average annual resource measures energy savings per HH
- Average non-energy benefits delivered per HH

Program Indicators:

- Average hardship reduction per HH

Portfolio Energy Savings Goals*:

Type	kWh	kW	Therms
Single Fam	12M	2K	370K
Multifamily	4.3M	430	190K
Mobile Home	2M	240	150K

**aggregate values over 6 years*

Participation Targets:

Dwelling Type	PY1	PY2	PY3	PY4	PY5	PY6
Single Family	8,600	6,600	5,699	6,299	6,648	7,348
Mobile Home	1,400	1,400	1,400	1,400	1,400	1,400
Multifamily In Unit	10,000	8,000	5,824	5,946	6,216	6,757
Audits Only	-	-	7,467	9,709	10,150	11,032
Total	**20,000**	**16,000**	**20,390**	**23,353**	**24,414**	**26,537**

MF Non-Deed Rest. CAM	**-**	**34**	**115**	**134**	**145**	**155**

Thank you

16. Future Agenda Items/Closing