Low Income Oversight Board

2nd Quarterly Meeting

June 17th, 2021

9:00 AM – 3:30 PM

California Public
Utilities Commission

Meeting Information

- All attendees will be **automatically muted** upon entry. Only the Host can unmute attendees and will unmute those who request to speak via the "Raise Hand" Feature.

- Members of the public or community based organizations will be able to provide comment to the Low Income Oversight Board during **Agenda Item 2**, or if requested by the Board.

- The chat box feature should not be used for formal comment. Attendees can use the chat box to message the host to ask general questions, note technical issues, or request to speak.

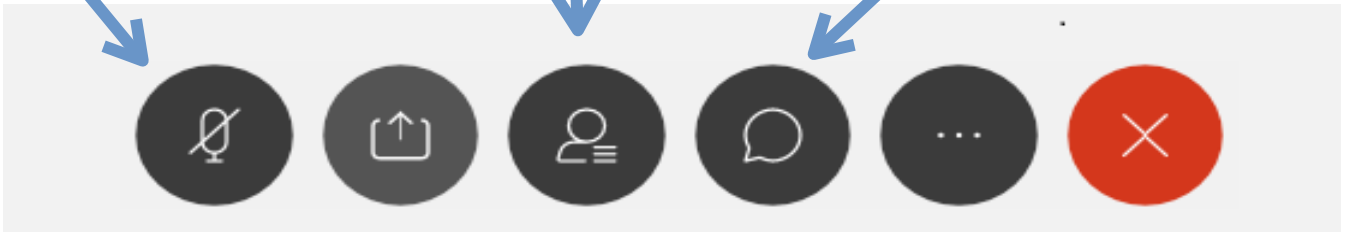
- This board meeting is a formal CPUC event and will be **recorded** for reference purposes.
- Energy Division may post the recording publicly after the event.

Webex Events Participant Guide

Un-Mute
or Mute
(only once the Host has unmuted you)

Click to see the participants and view “Raise Hand” button

Click to see the chat and enter questions



Gray means "on" (Not Muted, Sharing Video)

Red means "off" (Muted, Not Sharing Video)

Link to: Cisco Webex Participant Guide

Pursuant to Sec. 382.1 of the California Public Utilities Code, the purpose of the Low Income Oversight Board (LIOB) is to advise the California Public Utilities Commission on low-income electric, gas, and water corporation customer issues and to serve as a liaison for the Commission to low-income ratepayers and representatives.

Quarterly meetings are opportunities for board members to meet and discuss topics related to low-income customer issues. All LIOB meetings are open to the public.

While this meeting is being held via WebEx, all other normal procedures and protocols apply.

Meeting Audio in Spanish:
800-857-1917
Passcode: 9431214#

Closed Captioning (English & Spanish):
http://www.adminmonitor.com/ca/cpuc/

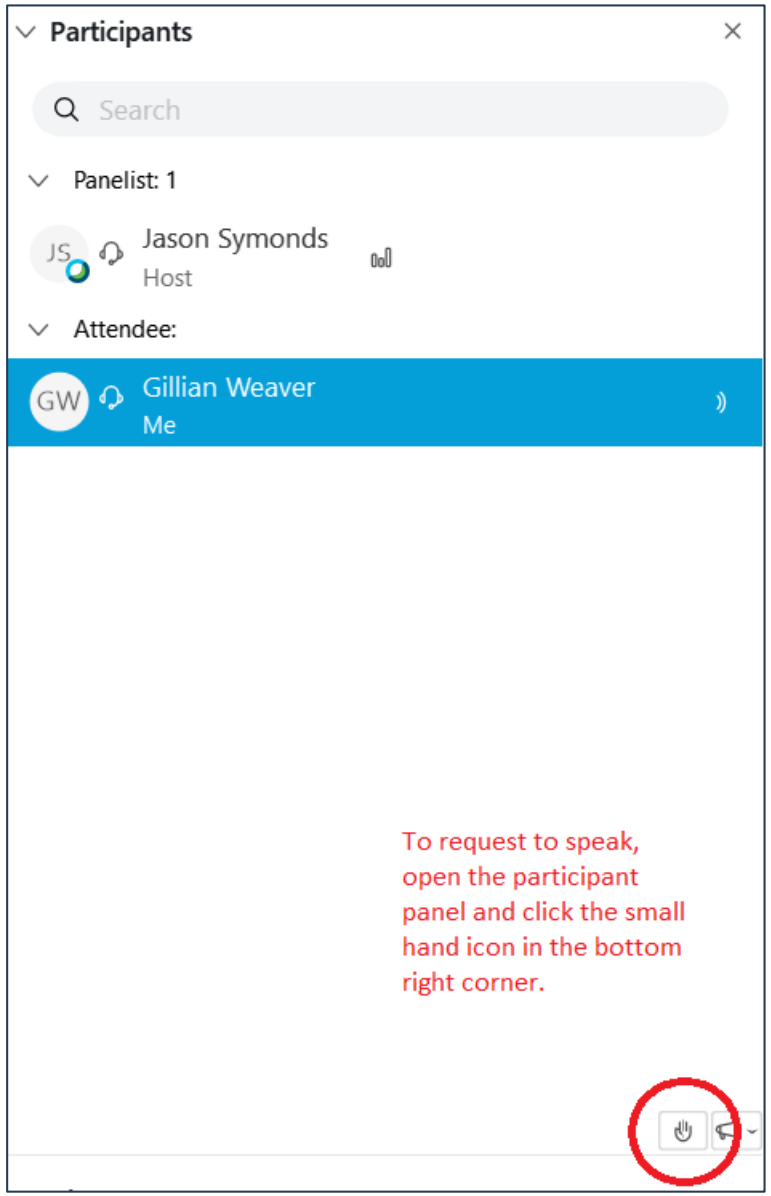
Item 1: Welcome and Introductions

Benito Delgado-Olson, LIOB Chairperson
Genevieve Shiroma, CPUC Commissioner

9:00 – 9:15 AM

Low Income Oversight Board

1. Genevieve Shiroma – CPUC Commissioner
2. Benito Delgado-Olson – Chair, Governor Appointee
3. Maria Stamas – Vice-Chair, Public Member
4. Jason Wimbley – CSD Representative
5. Robert Castaneda – Public Member
6. Lourdes Medina – Public Member
7. Patricia Watts – Private Weatherization Contractor
8. Paul Irwin – Public Member
9. Lisa Castilone – Public Member
10. Jeff Linam – Water Corporation
11. Jessica Lim – Electrical/Gas Corporation



Item 2: Public Comment

- **9:15 – 9:30 AM**
- English - Please use the "Raise Hand" feature in Webex window to request to speak
- Spanish – Please press *1 and state your name when prompted

- 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

Item 3: Approval of the March 11, 2021 1st Quarterly Meeting Minutes

9:30 - 9:35 AM

California Public Utilities Commission

Item 4: Comment from Community Based Organizations

9:35 – 9:55 AM

Item 5: Energy Division Update

9:55 – 10:30 AM

Presented by Kapil Kulkarni, Energy Division Staff

June 17, 2021

California Public
Utilities Commission

Agenda

- ESA/CARE/FERA Decision and Proceeding update
  - Revisions for Approved Decision
- Low Income Needs Assessment update
- Potential and Goals (P&G) Study update

ESA Budget

- Reaffirms the need for funding to support the program's goals
- Largely approves IOUs' proposed budgets
  - $2.2 billion over 5.5 years, compared to proposed budget of $2.6 billion over 6 years
  - **Approves $210 million bridge funding budget for 2nd half of 2021**
  - Approves cap of 10% for administrative costs
- Any unspent and uncommitted funds shall be automatically carried over and applied to offset the next year's revenue collection
- Established cost-effectiveness guidelines of a 0.7 benefit-cost ratio for the portfolio, and 0.3 for individual measures

ESA Pilot

- Approves $104 million for a pilot to test the feasibility of deeper energy savings, including electrification measures
  - Plus package – achieve up to 15% energy savings per household
  - Deep package – achieve up to 50% energy savings per household

- Timeline:
  - **By Oct 1**, 2021 – Workshop to solicit ideas on pilot program designs
  - **By Dec 31**, 2021 – IOUs submit program designs and budgets for CPUC approval
  - **By Q3** 2022 – IOUs begin implementation after approval

ESA Working Group (will meet quarterly)

- Comprised of Energy Division staff, IOUs, parties, and other stakeholders to ensure program success
- Tasked with discussing:
  - Measure and program changes, with notification through monthly reports
  - Progress towards program goals, review of 2023 Potential and Goals study, and recommending program changes as part of the mid-cycle update process
  - Cost-effectiveness test considerations and execution of Non-Energy Benefits (NEBs) study
  - Development of Universal Application System (UAS) and overseeing development of Multifamily Central Portal

ESA New Opportunities

- Requires IOUs to hold a workshop on identifying new opportunities for program coordination, and reaffirms existing coordination efforts
- Approves SCE Electrification pilots totaling about $50 million
  - Approves Building Electrification pilot of about $40 million for single family, high-using households in DACs to retrofit for electrification measures
  - Approves Clean Energy Homes pilot of about $10 million for low-income housing developers to install new electrification measures
- Direct IOUs to align Workforce Education and Training (WE&T) efforts with California Workforce Development Board

Next steps

- The Decision was approved at the 6/3 CPUC Voting Meeting and has taken effect.

- **By Sep 1**, IOUs will submit a compliance filing to align customer segments, treatment tiers, and measures.

- **By Oct 1**, workshops on:
  - Staff Proposal pilot design and stakeholder feedback
  - Low income and clean energy programs coordination

- All proceeding documents, including monthly reports, will be available in the docket card for A.19-11-003 at https://www.cpuc.ca.gov/proceedings/ as well as through the service list.

SMJU ESA/CARE Proceeding Schedule

- The Small and Multi-Jurisdictional Utilities (SMJU) ESA/CARE proceeding (A.20-03-014) schedule is ongoing and as follows:
  - **May 2020:** Alpine, Bear Valley Electric Service, Liberty, PacifiCorp, South West Gas and West Coast Gas submitted applications for ESA and CARE programs for PY 2021-2026 (no FERA for SMJUs per statute)
  - **Jan/Feb 2021**: Energy Efficiency Council (EEC), and the Public Advocates Office (CalPA) submitted intervenor testimony.
  - **Mar/Apr 2021:** Opening and reply briefs filed by EEC, CalPA, and the SMJUs.
  - **Q3 2021:** Proposed Decision and Final Decision is expected.

Questions?

2022 Low Income Needs Assessment

Recent Activity

- Draft research plan reviewed at LIOB LINA Sub-Committee Meeting on March 5, 2021
- Incorporated some changes based on member feedback and public comment
- Final research plan and response to comments posted to Energy Division's Public Document Area on April 9, 2021 (link to PDA)

2022 Low Income Needs Assessment

Current Activity

- Interviewing contractors and CBOs to (a) help provide context for the renter and landlord surveys and (b) understand how to reach non-English speaking households more effectively in future studies
- Developing phone survey interview guide

Upcoming Activity

- Data collection and analysis continues through June 2022
- Draft report will be presented at LIOB public meeting October 2022

2022 Low Income Needs Assessment

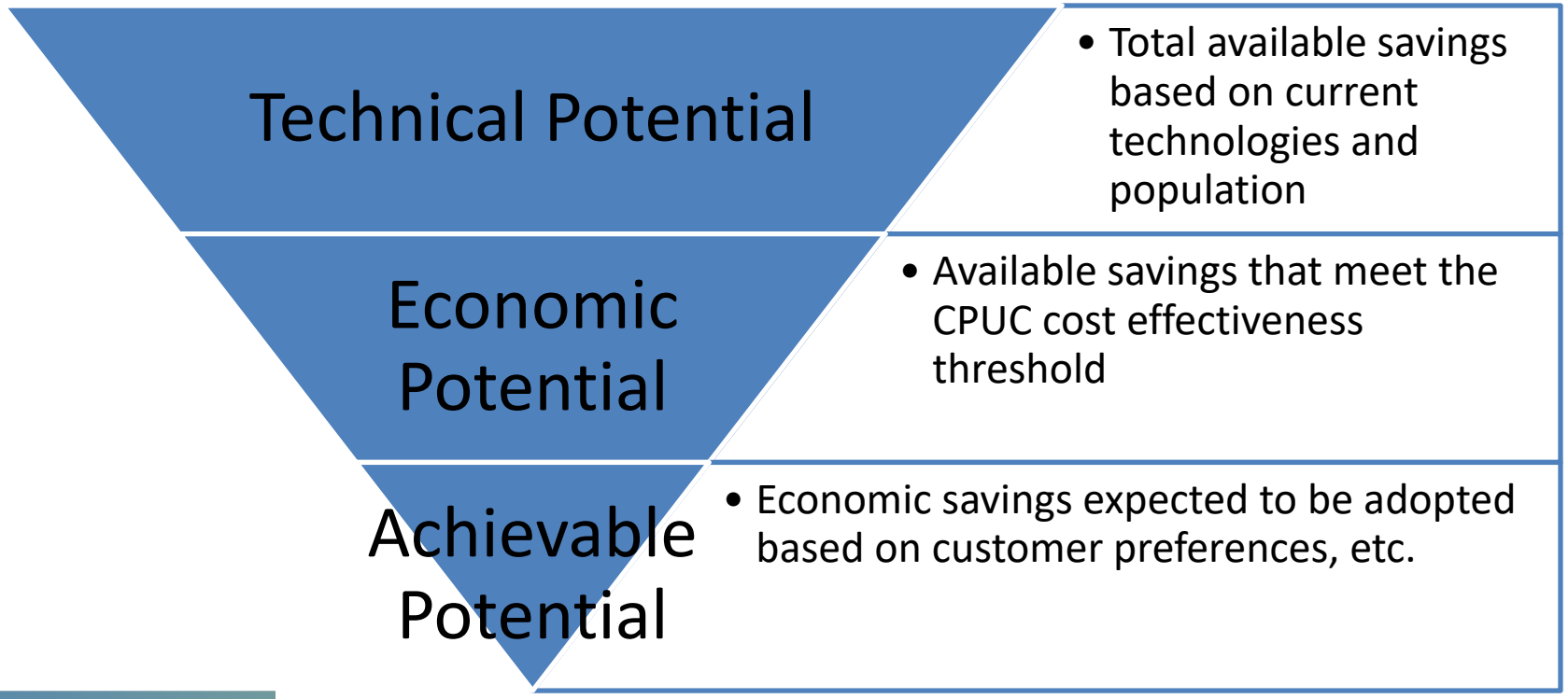
2022 Low Income Needs Assessment Schedule												
	2020				2021				2022			
Task	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
LIOB LINA Sub-Committee Meeting												
Develop Scope of Work												
LIOB LINA Sub-Committee Meeting on SOW												
RFP released												
Consultant selection												
Develop Research Plan												
LIOB LINA Sub-Committee Meeting on Research Plan												
Data collection and analysis												
Draft Report												
LIOB LINA Sub-Committee Meeting on Draft Report												
Final Report												

Questions?

Energy Efficiency Goalsetting Process

- The CPUC sets energy efficiency goals for investor-owned utilities by decision, using information from the bi-annual "Potential and Goals" study.

- The Potential and Goals study assesses three levels of possible energy efficiency savings which could occur in investor-owned utility territory.



Objective of the 2021 Low-Income Potential Study

- Develop a forecast of the Technical and Achievable Potential for energy savings for the ESA Program
- Improve upon previous modeling efforts of the Low-Income sector energy savings potential
- Inform the CPUC and stakeholders on the energy savings potential within the ESA program and residential low income sector in the years to come.

Overview

- Assess the energy savings potential from the ESA program absent any program restrictions

What is different in 2021 Study?	2017 Study: Extrapolated savings based on historical ESA programs and budget 2019 Study: Analyzed potential using customer willingness algorithms (used for the residential sector EE equipment rebate programs) to calculate adoption 2021 Study: Unique analysis focused on ESA measure list, technology category historical and proposed adoption rates, and consideration on the incremental adoption of the existing technical potential
Not in scope	• Economic potential analysis • Fuel Substitution measures • Demand response savings • New construction building types

Looking ahead

- Results of the 2021 Low Income Potential Study can be found on CPUC P&G study website:

https://www.cpuc.ca.gov/General.aspx?id=6442464362

- The 2023 P&G study will be used to help inform any mid-cycle goals updates to the ESA program.
  - The LIOB, parties, and other stakeholders will have the opportunity to participate in related workshops and other discussions to design and refine the study.

Thank you!

APPENDIX

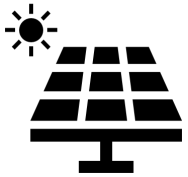
ESA Goals

- Moves towards deeper energy savings per household
- Largely approves IOUs' proposed energy savings goals
  - Includes 10 percent reduction to account for budget reduction
  - Includes 4 percent reduction to account for ESA pilot

298 GWh –
Enough to power about 36,000

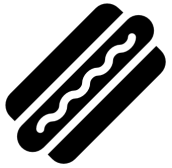
homes for one year

69 MW –
Equivalent to the installation of about 18,000



home solar PV systems

15 million therms –
Equivalent to the emissions from about 13 million



propane cylinders

ESA Household Treatment Goals and Targets

IOU	2021 (Goals) (July 1 to Dec. 31)	2022 (Targets)	2023 (Targets)	2024 (Targets)	2025 (Targets)	2026 (Targets)	Total
PG&E	50,000	59,340	60,437	54,876	52,954	51,099	328,705
SCE	43,562	27,051	37,871	64,922	59,512	56,806	289,725
SoCalGas	60,000	94,600	69,837	69,837	69,837	69,837	433,948
SDG&E	5,973	13,760	11,711	14,138	14,780	16,065	76,427
Total	159,535	194,751	179,857	203,773	197,083	193,807	1,128,805

ESA Budget

IOU	2021 (July 1 to Dec. 31)	2022	2023	2024	2025	2026	Total
PG&E	$89,362,820	$152,758,877	$172,231,361	$171,757,189	$171,120,842	$170,915,152	$928,146,242
SCE	$40,926,750	$58,773,576	$69,127,408	$91,154,996	$96,372,294	$74,799,327	$431,154,350
SoCalGas	$67,066,667	$122,802,317	$122,824,705	$122,814,843	$122,849,884	$122,541,070	$680,899,486
SDG&E	$10,729,079	$25,832,330	$27,043,980	$29,894,951	$31,768,583	$33,329,042	$158,597,966
Total	$208,085,316	$360,167,100	$391,227,455	$415,621,978	$422,111,603	$401,584,592	$2,198,798,044

ESA Program Design

Demographic	Financial	Location	Health Condition
Housing type	CARE	DAC	Medical Baseline
Rent vs Own	Disconnected	Rural	Respiratory
Previous vs new participant	Arrearages	Tribal	Disabled
Seniors	High usage	PSPS Zone	
Veterans	High energy burden	Wildfire Zone	
Hard-to-reach	SEVI	Climate Zone	
Vulnerable	Affordability Ratio	CARB Communities	

CARE Enrollment Goals

PY	PG&E Participation/ Enrollment Goal	SCE Participation/ Enrollment Goal	SoCalGas Participation/ Enrollment Goal	SDG&E Participation/ Enrollment Goal
2021	93%	90%	95%	90%
2022	93%	91%	95%	90%
2023	93%	91%	95%	90%
2024	93%	91%	95%	90%
2025	93%	91%	95%	90%
2026	93%	92%	95%	90%

CARE Budget

CARE Administrative + Subsidy Budget							
IOU	2021	2022	2023	2024	2025	2026	Total
PG&E	$697,689,600	$701,449,000	$705,934,600	$710,464,600	$715,401,200	$720,454,700	$4,251,393,700
SCE	$410,168,638	$414,451,972	$420,090,896	$425,574,643	$431,885,014	$438,631,834	$2,540,802,997
SoCalGas	$148,249,646	$149,669,161	$150,983,280	$152,497,417	$154,039,114	$155,411,268	$910,849,886
SDG&E	$127,005,610	$128,328,320	$129,725,602	$131,044,548	$132,671,061	$133,925,855	$782,700,996
Total	$1,383,113,494	$1,393,898,454	$1,406,734,378	$1,419,581,208	$1,433,996,389	$1,448,423,657	$8,485,747,580

FERA Enrollment Goals

PY	PG&E Participation/ Enrollment Goal	SCE Participation/ Enrollment Goal	SDG&E Participation/ Enrollment Goal
2021	30%	30%	30%
2022	40%	40%	40%
2023	50%	50%	50%
2024	60%	60%	60%
2025	65%	65%	65%
2026	70%	70%	70%

FERA Budget

FERA Administrative + Subsidy Budget							
IOU	2021	2022	2023	2024	2025	2026	Total
PG&E	$12,837,700	$15,692,400	$18,573,400	$21,202,000	$23,816,900	$26,419,800	$118,542,200
SCE	$21,652,364	$29,442,231	$38,113,457	$46,994,493	$52,414,418	$58,120,459	$246,737,422
SDG&E	$3,583,582	$4,134,325	$4,493,780	$5,066,528	$5,543,044	$6,029,130	$28,850,389
Total	$38,073,646	$49,268,956	$61,180,637	$73,263,021	$81,774,362	$90,569,389	$394,130,011

Break

Item 6: EE Goals Policy Track and Modification of Portfolio Process Decision (D.21-05-031)

10:45 – 11:00 AM

Presented by Jessica Allison, Energy Division Staff

California Public
Utilities Commission

Overview

Key Topics	Decision Changes
Total System Benefit	Changed our current kWh, kW, therms metrics for EE goals and accountability to a new metric: • Total System Benefit ($), which would be the avoided cost.
Portfolio Segmentation	Segment EE portfolios according to three primary objectives. 1. Resource Acquisition 2. Market Support 3. Equity
Portfolio Structure & Approval Process	Adopted modified portfolio processes which included: • 4-year Funding Application, with 8-year business plan section • Mid-cycle (2-year) budget refresh.

Total System Benefits

Total System Benefit

Total system benefit is an expression, in dollar terms, of the lifecycle energy, capacity, and GHG benefits, expressed on an annual basis.

How it works:

- Replace current metrics (GWh, MW, MMTherms) with 1 new metric for EE portfolios: Total System Benefit ($).
- Total System Benefit = the $ avoided costs, as calculated by a cost effectiveness calculator used across all of the EE proceeding.
- Use the Total System Benefit output from the Potential and Goals Study to set EE Goals by IOU.
- Energy forecasts (kWh, KW, Therms) would will be reported and transmitted to CEC for planning purposes.

Rationale for Change

- Portfolios were optimized to meet kWh, kW, and therm goals, but the value of energy savings to the grid vary widely depending on the time of day the energy is saved.

- State policy focused increasingly on GHG reduction targets, which were not reflected in CPUC energy efficiency goals.

- Unlike kW, kWh, and Term, TSB is "fuel agnostic" which facilities easier valuation of building decarbonization and fuel substitution efforts.

Portfolio Structure

Challenges With Today's Portfolio Structure

- The energy efficiency portfolios serve multiple objectives, but savings from resource programs needed to justify all of the costs of the energy efficiency portfolios.

- Programs which serve important equity and market support functions applied downward pressures on the overall portfolio cost-effectiveness and traditionally highly cost-effective programs were no longer available to balance it out.

- Therefore, Program Administrators face a dilemma of maintaining cost-effectiveness or delivering a balanced portfolio.

Changes to the Portfolio Structure

Status Quo

- All programs assessed collectively.
- All program benefits must outweigh all program costs in a ratio of 1.25.

Adopted Change

- Programs segmented based on primary purpose:
  - Resource Acquisition
  - Market Support
  - Equity
- Resource acquisition benefits must have a 1:1 ratio to costs. Market support and equity program budgets must not exceed 30% (except for RENs).
- CAEECC working groups will develop quantitative assessment metrics. Process will be discussed at full committee meeting on June 24th. https://www.caeecc.org/

Segment Definitions

The decision ordered program administrators to segment their portfolios based on the *program's primary purpose:*

- **Primary Resource Acquisition:** Programs with a primary purpose of, and a short-term ability to, deliver cost-effective avoided cost benefits to the electricity and natural gas systems.
- **Market Support:** Programs with a primary objective of supporting the long-term success of the energy efficiency market by educating customers, training contractors, building government partnerships, or moving beneficial technologies towards greater cost effectiveness.
- **Equity:** Programs with a primary purpose of providing energy efficiency to hard-to-reach or underserved customers and disadvantaged communities in advancement of the Commission's Environmental and Social Justice Action Plan. Improving access to energy efficiency for ESJ communities may provide corollary benefits such as increased comfort and safety, improved indoor air quality, and more affordable utility bills, consistent with Goals 1, 2 and 5 in the ESJ Action Plan (D.21-05-031, 14).

Deeper Dive into Equity Programs

Program Criteria

- Distinct from Energy Savings Assistance Program (p.15)
- Equity program criteria, including the distinction between equity and ESA programs, will be further explored in the CAEECC Working Group (p.15)

Example: PGE Direct Install for Manufactured and Mobile Homes (TRC 0.37)

From the Program Implementation narrative: Serves moderate-income residential customers living in mobile home parks. This comprehensive program will provide new and measurable direct savings via the installation of energy-efficient gas and electric equipment and water-saving device. The program will target non-English-speaking customers, including those who speak Spanish, Russian and a variety of Asian languages.

This is a currently defined as a resource program, but it serves hard-to-reach middle income customers. The low TRC suggests that equity may be its primary focus over avoided costs.

Program Segmentation Timeline

June 2021: CAEECC meeting to discuss segmentation criteria.

- CAEECC will propose more granular segment definitions and criteria.
- First look at possible program segmentation criteria.
- Stakeholders can participate on June 24, 2021.

September 2021: Informational segmentation for 2022 & 2023 ABALS.

- Not a criteria for ABAL approval.
- No assessment of segmentation reasonableness.

February 2022: PAs propose segmentation in 2024 Application

- Reasonableness assessed in application process.
- Encouraged to work with CAEECC working group.
- CPUC decision will approve final segmentation scenarios.

Q&A

Please let us know what questions you have!

Key Topics	Decision Changes
EE Goals Metrics	Changed our current kWh, kW, therms metrics for EE goals and accountability to a new metric: • Total System Benefit ($), which would be the avoided cost.
Portfolio Segmentation	Segment EE portfolios according to three primary objectives. 1. Resource Acquisition 2. Market Support 3. Equity.
Portfolio Structure & Approval Process	Adopted modified portfolio processes which included: • 4-year Funding Application, with 8-year business plan section • Mid-cycle (2-year) budget refresh.

Additional Slides

Background on the Process

- **March / April 2020:** CPUC issued potential and goals ruling, while NRDC filed motion proposing changes to portfolio process.
- **July 2020:** CPUC issued decision scoping memo and solicited comments on portfolio structure and approval process.
- **April 2021:** CPUC issued proposed decision addressing the energy efficiency goals, portfolio structure, and approval process.
- **May 2021:** CPUC issued final decision.
- **Summer 2021:** Release of the Potential and Goals study and decision adopting goals.
- **Fall 2021:** Annual budget advice letters for PY 2022 & 2023 and applications for PY 2024-2027.

Primary Resource Acquisition Criteria

Program Criteria

- Primary benefits are immediate avoided costs (savings)
- Achievements work towards P&G goal attainment
- Evaluated using benefit / cost ratio, IRP, or variation TBD
- Segment should be cumulatively cost effective

Example: PGE Commercial Deemed Incentives (TRC 1.25)

From the Program Implementation narrative: The Commercial Deemed Incentives Program offering provides utility representatives, equipment vendors, and customers an easy-to-use mechanism to cost-effectively subsidize and encourage adoption of mass market efficiency measures through fixed incentive amounts per unit/measure.

This is a resource program with the stated goal of cost effectively delivering energy savings through the incentivization of mass market energy efficiency measures. It has no objectives competing with the primary purpose of delivering resource savings.

Market Support Criteria

Program Criteria

- Primary benefit is long term support of the market by educating customers, training contractors, building government partnerships, or moving beneficial technologies towards greater cost effectiveness.
- Evaluated by quantitative achievement of metrics & zero-based budgeting.

Example: PGE LED Accelerator (TRC 0.47)

From the Program Implementation narrative: The program will bridge gaps between manufacturers of new light emitting diode (LED) lighting technology and large multi-site commercial customers that can install LED technology in large numbers. The program emphasizes demonstrating and promoting LED display lights in the retail and restaurant sectors. The program will be implemented by Energy Solutions.

This program does deliver energy savings, but its focus is supporting the market by bridging gaps which historically served as barriers to adoption. There is an education component which delivers benefits not measurable in avoided costs.

Changes to the Portfolio Process

Topic	Status Quo	Adopted Process
Timeline	10-year cycles	4-year cycles
Budget	Set for 10 years w/ Annual Budget Advice Letters	Set for 4 years via application, with 8-year budget cap in business plan section
Cost Effectiveness	Annual	Measured over 4 years
Interim Filings	Annual budget advice letters	Mid-cycle "check in" advice letters
Potential and Goals	Biennial P&G update	Biennial P&G update
Avoided Costs	Yearly updates	Update avoided costs biennially with P&G study
Technical Inputs	Updated annually	Updated biennially

Rationale for the Change

- The 10-year portfolio cycle did not provide a meaningful opportunity for stakeholder and regulatory review of Energy Efficiency budgets and programs.
- The ABALs were intended to be ministerial but became contentious, as stakeholders wanted an opportunity to review.
- Annual cost effectiveness assessments did not account for natural market or program fluctuations.
- Annual spending applications resulted in de facto annual cycles which created uncertainty for program implementors.

Item 7: CPUC Standing Reports

11:00 AM – 12:00 PM

California Public Utilities Commission

CPUC Standing Reports

- Legislative Update
- Water Division
- Community Help and Awareness of Natural Gas and Electric Services (CHANGES)

California Public Utilities Commission

Legislative Bill Update – Office of Governmental Affairs

Bills of Interest to the Low-Income Oversight Board Meeting – Thursday June 17th, 2021

On Friday June 4th both houses of the Legislature had their "House of Origin" deadlines, which is the last day for each house to pass bills introduced in that house. Several bills of interest to the Low-Income Oversight Board (LIOB) are still active and are summarized below:

1. Assembly Bill 1058 (C. Garcia) - Water corporations: bill payment options.

This bill would extend an existing credit-card payment pilot program for water corporations until January 1, 2027; would require the commission, in consultation with the LIOB to submit another report relative to the pilot program by July 1, 2025.

Status: *In Senate Energy, Utilities & Communications pending hearing.*

2. Senate Bill 222 (Dodd) - Water Rate Assistance Program.

Would establish the Water Affordability Assistance Fund in the State Treasury to help provide water affordability assistance, for both drinking water and wastewater services, to low-income ratepayers and ratepayers experiencing economic hardship in California. The bill would require, by July 1, 2022, the Public Utilities Commission to establish a mechanism for electrical corporations and gas corporations to regularly share specified customer data with the state board, subject to certain confidentiality protections. To the extent this provision would impose new requirements on local publicly owned electric utilities and local publicly owned gas utilities, the bill would impose a state-mandated local program.

Status: *In Assembly Rules pending referral to committee.*

3. Senate Bill 756 (Hueso) - Home weatherization for low-income customers..

Redefines "low-income customers" for eligibility purposes of home weatherization programs to mean low-income persons and families whose household income is at or below 250% of the federal poverty level.

Status: *In Assembly Utilities & Energy Committee pending hearing.*

Water Utilities Update
Low – Income Oversight Board

Water Division

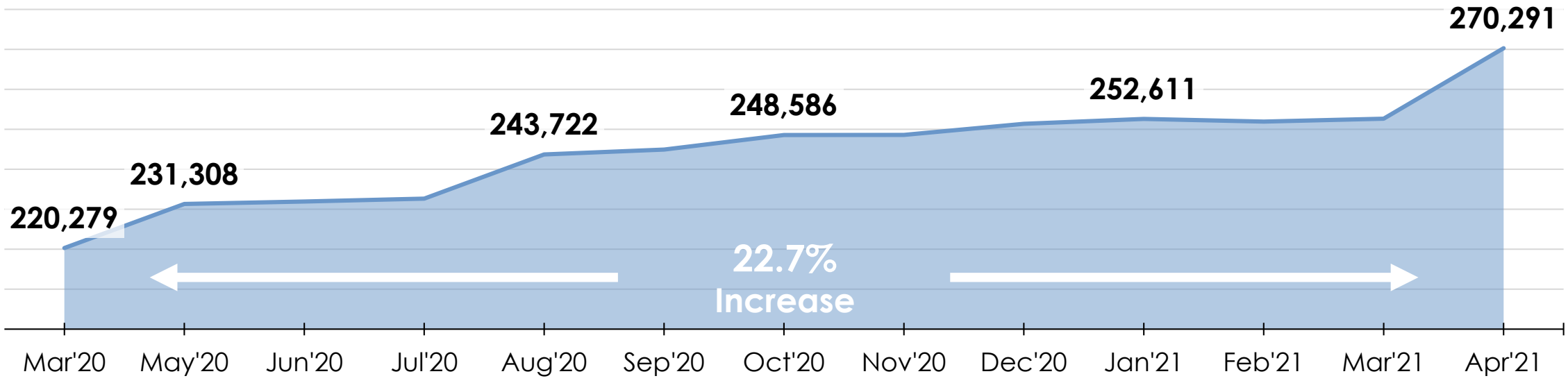
June 17, 2021

California Public
Utilities Commission

Overview

- COVID Impact on Customer Assistance Program (CAP) Customers
  - CAP Enrollment
  - Bill Arrearages
- Water Investor-Owned Utility (IOU) Transition Plans
- Drought Conditions

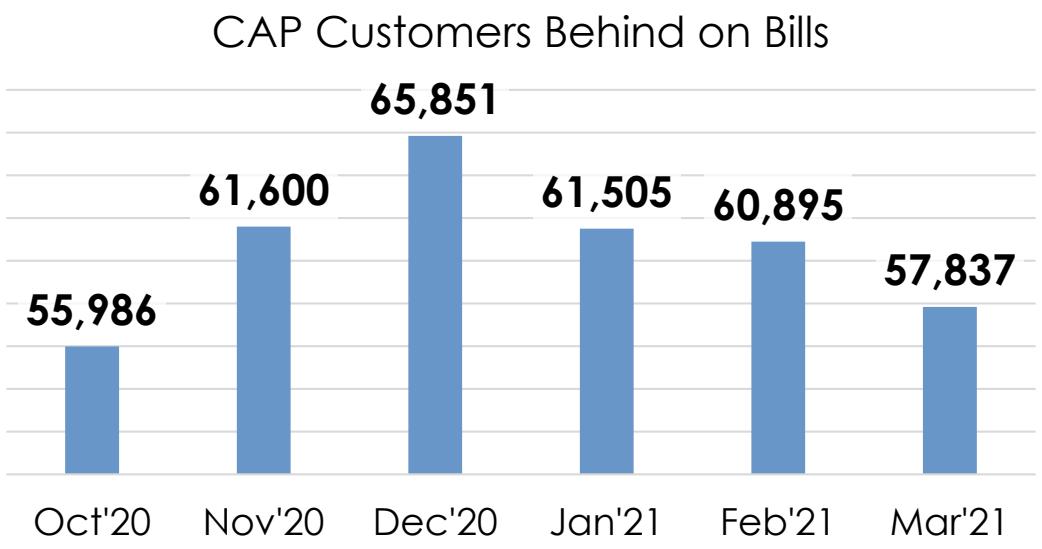
Customer Assistance Program (CAP) Enrollment

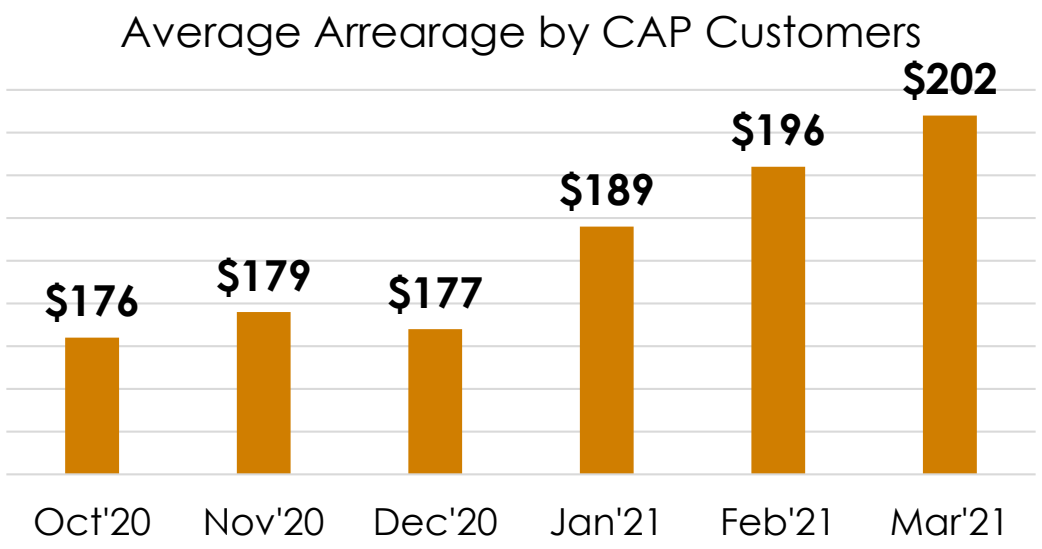


- Between March 2020 and April 2021
  - Participation increased by **50,012** or **22.7%**
  - % of Residential Customers participating increased from 18% to **22%**
- Recent Data Exchange completed in April 2021

Water Bill Arrearages
As of March 2021

- Total Arrearage: $62.1M
  - **$11.7M** or 18.9% are from CAP customers
- **26.7%** of all customers in arrears are CAP



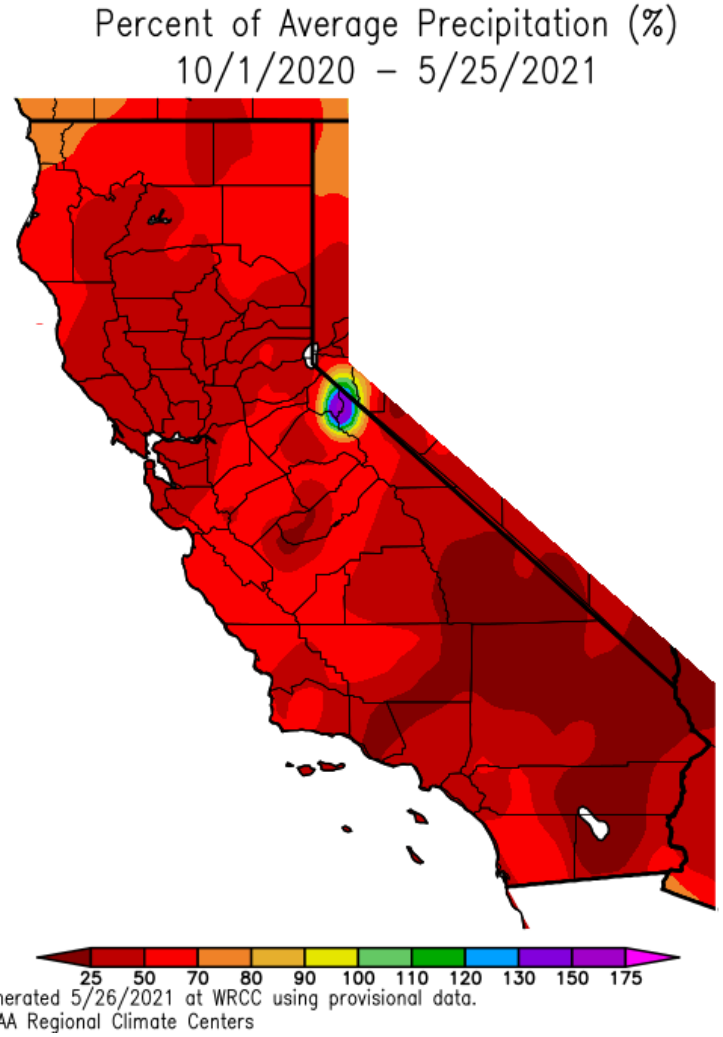


CAP customers in arrears decreasing however average amount owed increasing

Water IOU Transition Plans

- Target customer outreach to hard-to-reach areas and disadvantaged communities
- Increase CAP data exchange to quarterly by 2022
- **Disconnection Policy Resumption** (DPR)
  - Date TBD by Governor
  - 60 Days Before: Notify customers of DPR
  - 30 Days Before: Notify customers of CAP recertification & resumption of reconnection fees
  - **DPR Date**: Resume standard procedures for disconnection/reconnection & CAP recertification
- **Alternative Payment Plans**
  - Offered by all Class A & B Water IOUs
  - No disconnection if under payment plan
- **Arrearage Management Program (AMP)/Debt Forgiveness**
  - No water IOUs have proposed AMPs
  - May be considered in Water Affordability Proceeding (R.17-06-024)

Current Drought Conditions



- Governor's Drought Emergency Declarations
  - April 21 & May 10
  - 41 counties
    - Covering Russian River, Sacramento & San Joaquin watershed, Tulare Lake region, and Klamath region
  - No mandatory conservation yet

- Resources on Drought
  - cpuc.ca.gov/droughtinfo
  - CA Drought Preparedness
    waterresilience.ca.gov/drought-preparedness
  - CA Save Our Water
    saveourwater.com

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
June 17 , 2021

CHANGES services have continued throughout the pandemic. CBOs have modified procedures to leverage COVID relief activities such as:

- Collecting & review bills during home food deliveries.
- Providing information and receiving bills during emergency drive-through food pick-ups.
- Reviewing bills when providing emergency COVID relief assistance such as rental, utility and nutrition assistance.
- Providing information and collecting bills in conjunction with COVID testing and vaccine clinics.

Consumers seeking assistance bring utility bills
to an outdoor emergency food distribution.

Services provided in the program year include newly implemented programs and COVID-related emergency relief services.

Arrearage Management Plan (AMP)

Since its implementation on February 1, 2021, CHANGES CBOs enrolled **373 households in AMP**.

FCC Emergency Broadband Benefit

Program enrollment began May 12, 2021. In the first 19 days of the program, TEAM CBOs **enrolled 68 households in the program**.

CPUC Resolution M-4848 imposed a moratorium on telephone disconnections on accounts in which the consumer has self-certified that they experienced COVID-related financial hardship. TEAM CBOs have **assisted with 292 certifications**.

Needs Assistance and Dispute Resolution Services

Collection of bills and eligibility documentation is challenging during the pandemic. CBOs utilize a variety of creative methods to receive information from consumers, including:

- Providing verbal instructions over the phone on how to take photos of documents and text or email them;
- Driving to consumers' homes and having them place documents outside their doors for contactless pick-up;
- Encouraging document and bill submission during food distribution, vaccine, and testing in order to avoid unnecessary trips.

Needs Assistance and Dispute Resolution Services cont.

- Setting up online accounts that the CBO can access with permission
- Calling previous clients to explain COVID relief policies and resources and completing a bill review on the phone.
- Sending clients stamped envelopes to mail documents to the CBO. This can add several days to the process and clients sometimes send the incorrect information.

Most Prevalent Services/Issues
November 1, 2020 – May 31, 2021

Needs Assistance:

1. LIHEAP -- 1,552
2. Arrearage Management Plan (AMP) -- 373
3. Assist with changes to account – 265
4. Gas Assistance Fund -- 199
5. Medical Baseline Application Assistance -- 196

Dispute Resolution:

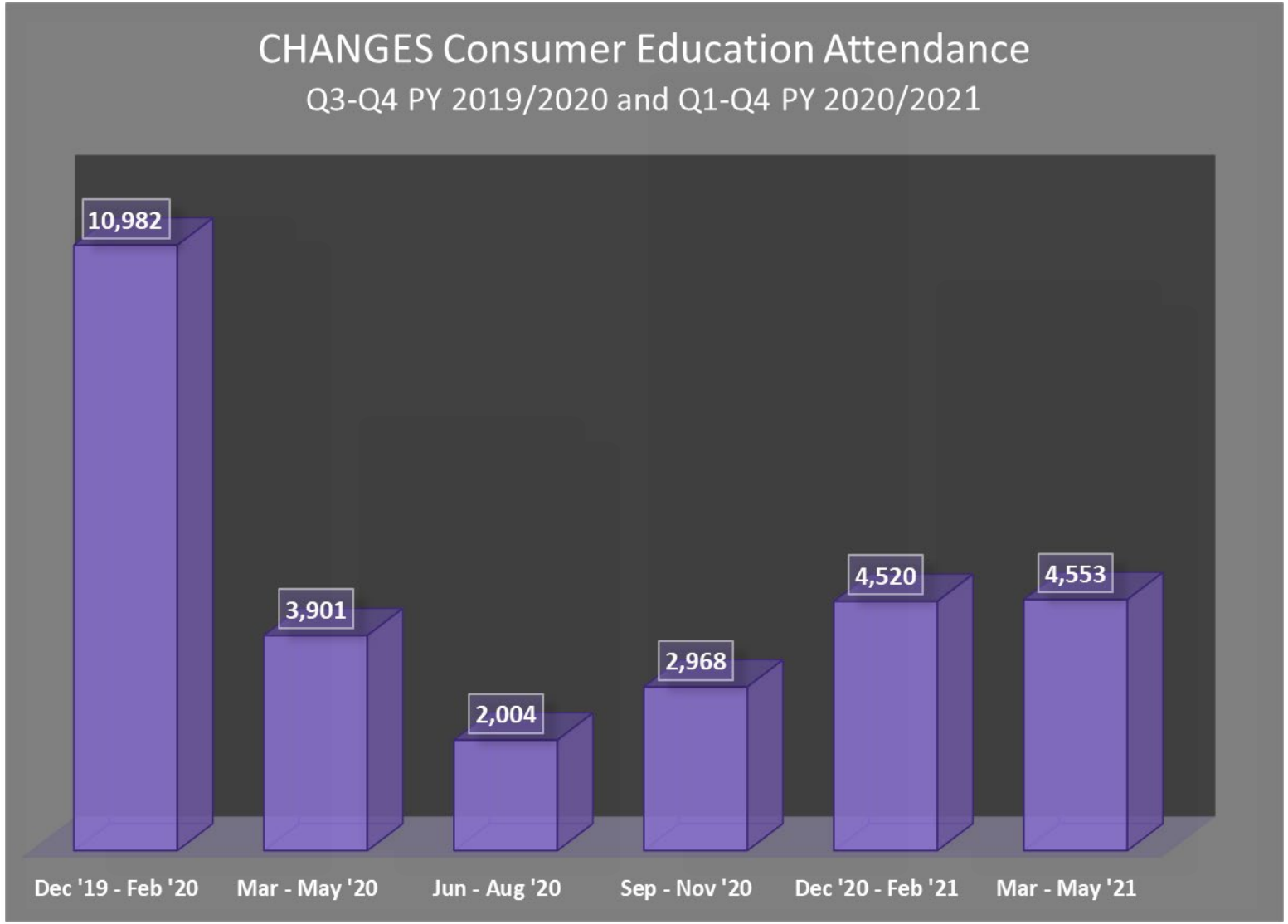
1. Electricity Aggregation -- 299
2. Gas Aggregation -- 200
3. Assistance program applications and enrollment -- 148

Consumer Education

- Consumer Education was shifted to remote, online classes.
- Over 300 in-language consumer education presentation documents were developed for use in online education in TEAM and CHANGES.
- Remote education has had marginal success, as LEP consumers have relatively limited technology skills and slower internet speeds.
- Challenges include the inability to collect attendance signatures, and difficulties with facilitating group conversations. Evaluation of consumer education has been suspended during the pandemic.

Consumer Education cont.

- Remote consumer education is not a preferable delivery method for all consumers.
- Many lack access to computers. Low-income internet programs may not provide speeds to adequately accommodate meeting platforms.
- Verbal instructions on how to navigate online meeting platforms are typically difficult to follow.
- Remote consumer education does not reach the most vulnerable consumers.
- Adult learners often require several delivery methods, including group discussions and hands-on aids, which can be difficult in remote group presentations.

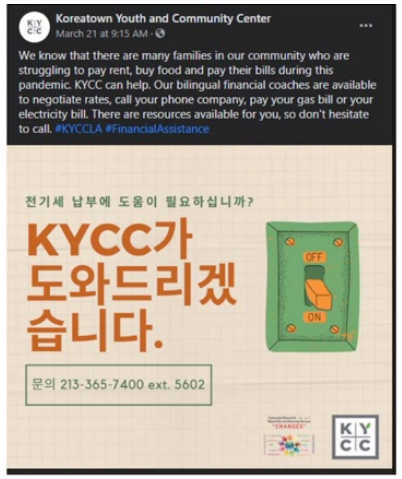

CHANGES Consumer Education Attendance
Q3-Q4 PY 2019/2020 and Q1-Q4 PY 2020/2021
10,982
3,901
2,004
2,968
4,520
4,553
Dec '19 - Feb '20
Mar - May '20
Jun - Aug '20
Sep - Nov '20
Dec '20 - Feb '21
Mar - May '21

Outreach Activities

CBOs have focused on Outreach activities that can be conducted with limited in-person contact:

Community Events have not been available during the pandemic. A limited number of drive through events have been conducted.

Social Media Outreach has become a predominant method of outreach due to the pandemic but does not reach the most vulnerable consumers.



Outreach Activities cont.

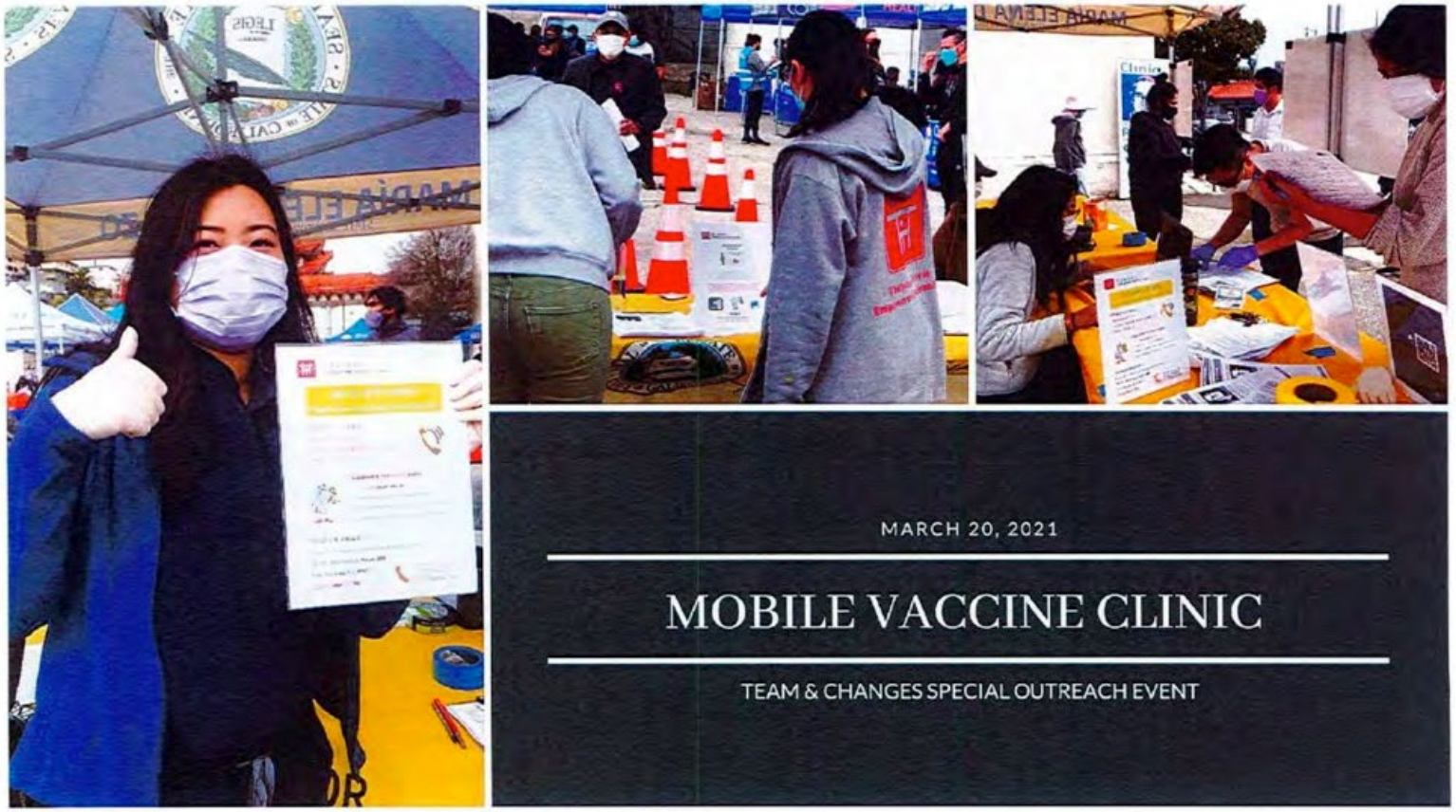
Bill Fairs are typically large, multi-organization, in-person events and have not occurred during the pandemic.

Media Outreach: CBOs utilize radio, television and print media to promote program services. Radio and television outlets serving smaller immigrant communities have had limited access to broadcast facilities. Special emphasis has been made to inform communities about COVID-related protections.

CHANGES Media Outreach 2020 – 2021 Program Year	
Print	14 placements
Radio	15 interviews
Television	4 interviews

Outreach Activities cont.

- Special Outreach Projects have been designed to combine CHANGES services into COVID-related assistance events.



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Lunch

Recommendations Pursuant to Resolution M-4849 and Related Matters

Presented by Ben Menzies, Jenneille Hsu, Mia Hart & Gillian Weaver

Energy Division Staff

California Public Utilities Commission

LIOB Recommendations

1. Extreme Climate Protections
2. Increase CARE Subsidies for the Most Vulnerable to 50% as part of AMP
3. CARE Data Sharing for Water Utilities
4. Marketing and Outreach
5. Define and Measure Success
6. Aliso Canyon Best Practices
7. Coordination with LIHEAP
8. Referral to Weatherization and Other Programs as Part of AMP

Recommendation #1: Extreme Climate Protections

LIOB Recommendation

a) The LIOB recommends that all transition plans include a 7-day or 168 hour-look-ahead period, where if temperatures are forecasted to be above 100 degrees or below 32 degrees, the household shall not be disconnected. The LIOB requests this to be in effect through December 31, 2021.

b) The LIOB also requests the Commission to pursue all other appropriate procedural avenues to make this best practice a permanent policy thereafter.

c) While not within the scope of the Resolution, the LIOB asks the Commission to work with the utilities to develop an "emergency restoration policy," that would temporarily restore service to any household already disconnected when an extreme climate event is predicted in the immediate future.

**These recommendations above are made with the assumption that restoring and/or maintaining power would not conflict with a Public Safety Power Shutoff scenario.*

Recommendation #1: Extreme Climate Protections

Response in Utility Transition Plans

- Not adopted at this time.
- **Current rule:** 72-hour look-ahead was established in Disconnections Rulemaking pursuant to D.18-12-013 (temporary basis) and D.20-06-003 (permanent basis).
- **Current proceeding status**:
  - Percentage of Income Payment Plan Pilots Phase, followed by "Phase I-A" (Small and Multi-Jurisdictional Utilities)
  - Phase 1-A is currently scoped to include "other safety issues which the Commission should consider in Phase 1-A"
  - Phase II scope will include more fundamental reforms and could include this "emergency restoration policy" concept, but would require a modification to existing 72-hour rule set forth in D.20-06-003.

Recommendation #2: Increase CARE Subsidies for the Most Vulnerable to 50% as part of AMP

LIOB Recommendation

a) The LIOB recommends that the Commission instruct utilities to include CARE discounts of up to 50% for households at the highest risk of disconnection as part of their transition plans or other appropriate process.
   - This recommendation is only for households believed to be at high risk of a future disconnection absent of this measure.

Recommendation #2: Increase CARE Subsidies for the Most Vulnerable to 50% as part of AMP

Response in utility transition plans

- California Assembly Bill 327 and P.U. Code section 739.1(c)(1) states the effective CARE discount shall not be less than 30% and more than 35% of the revenues that would have been produced by non-CARE customers.
- Changes in the CARE discount can be addressed in the Commission's Income-qualified Proceeding, A.19-11-003.

Recommendation #2: Increase CARE Subsidies for the Most Vulnerable to 50% as part of AMP

R.12-06-013: Commission's Own Motion to Conduct a Comprehensive Examination of Investor Owned Electric Utilities' Residential Rate Structures, the Transition to Time Varying and Dynamic Rates, and Other Statutory Obligations

- **D.19-09-004**: The Commission explored the idea of an increased discount or tiered CARE discount in the Residential Rate Reform proceeding and declined to adopt the proposals because "increasing the discount for a subset of CARE customers necessarily results in reducing the CARE discount for another subset of CARE customers."

Recommendation #3: CARE Data Sharing for Water Utilities

LIOB Recommendation

a) The LIOB recommends that the Commission instruct electricity and gas utilities to share their CARE data with Class A and Class B Water Utilities at intervals of no less than a quarterly basis as part of their transition plans.

b) The Board further encourages the Commission to pursue all avenues to make this practice a permanent policy to ensure low-income households have access to all programs that may reduce their utility costs. This includes allowing utilities the resources to build the necessary systems for implementation and management.

Recommendation #3: CARE Data Sharing for Water Utilities

Response in utility transition plans

- (3a) Utilities support the intent of this recommendation, but note that increasing the frequency of data exchanges may not be feasible or practical for all water utilities.
- (3b) A permanent increase in the frequency of data sharing between water and energy utilities should be discussed under the Commission's Low Income Water Proceeding R.17-060-024.

Recommendation #4: Marketing and Outreach

LIOB Recommendation

a) **The Board recommends the Commission to direct IOU transition plans to require separate and distinct marketing, education, and outreach (ME&O) plans for targeting hard-to-reach customers**, including those residing on tribal lands and within communities designated as low-income, disadvantaged, and/or underserved. Plans should disclose geographical detail to identify the areas the specific targeted ME&O plans will encompass.

b) **The Board recommends the Commission extend flexibility for IOUs to increase ME&O budgets by 50% for the transition period**, to ensure they are adequately scaled and incorporate the needed enhancements to effectively serve hard-to-reach customers and underserved communities. In extending this flexibility, the Commission shall require IOUs to identify financial and contractual resources extended to human services agencies and community-based organizations specifically targeting and serving hard-to-reach customers and underserved communities.

c) **The Board recommends the Commission direct IOUs to develop reporting mechanisms to track expenditures and outcome results** from partnerships with community-based organizations and human services agencies specifically targeting hard-to-reach customers and underserved communities.

Recommendation #4: Marketing and Outreach

Response in utility transition plans

- (4a) Utilities did not accept recommendation for separate and distinct marketing, education, and outreach plans for hard-to-reach customers, however PG&E and SDG&E noted their outreach plans include hard-to-reach customer groups.

- (4b) Utilities did not anticipate needing more funds than already allocated for ME&O and Commission did not need to extend flexibility to increase budget since large IOUs track costs in their COVID-19 Pandemic Protections Memorandum Accounts (CPPMA).

Recommendation #4: Marketing and Outreach

OIR to Address Energy Utility Customer Bill Debt Accumulated During the COVID-19 Pandemic

R.21-02-014: Mailed May 24, comments due June 13

- **(4b, 4c) Working together with IOUs, Energy Division staff will create a map of CBOs in each energy utility service area.** This map will provide a structure to identify gaps to fill or barriers to overcome.
  - The map will display the geographic reach of each CBO, identify the functions that each CBO currently performs, and the communities to whom they offer service.
  - On the map or in a companion report there should be listings of the functions each CBO performs, the communities with which they engage, and compensation structure, if any.
  - At a minimum, communities should be specifically labeled as DACs, ESJs, hard-to-reach, Small Business, tribes, or access and functional needs.
- **Energy utilities will submit a jointly developed template to the Energy Division within 60 days of the issuance of this decision**. Energy Division will work cooperatively with the energy utilities to finalize the template, populate the map and companion report, and present it at a future LIOB meeting for additional refinement.

Recommendation #5: Define and Measure Success

LIOB Recommendation

a) **The LIOB recommends the Commission direct utilities to provide no less than quarterly reports to the LIOB that at a minimum provide the following information as part of their transition plans:**
   - What number and percentage of disconnections were households enrolled in AMP?
   - What number and percentage of disconnections were households enrolled in CARE where applicable?
   - What number and percentage of disconnections were households enrolled in CARE and AMP?
   - What number and percentage of disconnections were households that received assistance from the LIHEAP program?
   - What percentage and number of households enrolled in AMP were referred to the following programs:
     - ESA
     - LIWP
     - LIHEAP
     - Other Programs
   - What were the median and average lengths of disconnections?
   - What were the median and average arrearage amount and time past due from a disconnection?

b) **The LIOB further recommends the Commission to direct all utilities to include their definition of success in their transition plans so this can be measured with the data presented in answering the above. If possible the Board requests utilities coordinate their definition of success to ensure uniformity in outcome evaluation.**

Recommendation #5: Define and Measure Success

Response in utility transition plans

- (5b) Success means keeping customers connected and helping impacted customers enroll in assistance programs.

- To measure success and set up a baseline, the IOUs will report number of customers enrolled in Arrearage Management Program (AMP) and 12-month payment plans during the customer protections (March 2020 to June 2021).

- The large IOUs jointly developed a standardized reporting template and will start reporting in the July 20 Disconnection Monthly Reports. The reporting period will last one year and end in June 2022.

Recommendation #5: Define and Measure Success

- **(5a) Reporting metrics**
  - Monthly reporting metrics include:
    - Number of customers enrolled in Arrearage Management Program (AMP) during protections period and remain on the programs after protections end.
    - Number of customers enrolled in 12-month payment plans during protections period and remain on the programs after protections end.
    - Number of customers requested and completed CARE and FERA post-enrollment verification.
    - Number of new payment plans
    - Number of completed payment plans
    - Number of broken payment plans
    - Number of customers enrolled in AMP
    - Number of customers were removed from AMP and receive disconnections within 6 months
  - Disconnections and arrearage amounts are reported in Disconnections Monthly Reports.
  - SMJUs proposed different metrics, but in general will report number of payment plans, total arrears, and number of customers enrolled in low-income programs (e.g. CARE, ESA, and LIHEAP).

Recommendation #6: Aliso Canyon Best Practices

LIOB Recommendation

a) The LIOB recommends that the Commission direct the IOUs to enhance Energy Savings Assistance (ESA) with emergency energy cost reductions measures that ensure a minimum of 10% savings to low-income ratepayer bills as part of their transition plans or other appropriate process.

Recommendation #6: Aliso Canyon Best Practices

Response in utility transition plans

- Changes in the Energy Savings Assistance (ESA) program should be discussed under the Commission's income-qualified proceeding A.19-11-003

- Current approved ESA measures, that address energy savings, health, comfort and safety, cannot ensure a minimum of 10% savings to low-income ratepayer bills.

Recommendation #6: Aliso Canyon Best Practices

Energy Savings Assistance Program - Pilot Plus & Pilot Deep Program (2021-2026 Program Cycle)

- Approves $104 million (4% of IOUs originally proposed budget) for a pilot to test the feasibility of deeper energy savings, including electrification measures
  - Plus package – achieve up to **15% energy savings per household**
  - Deep package – achieve up to **50% energy savings per household**
- Plus package will target households who are a part of multiple customer segments (for example, Medical Baseline, at risk for disconnection, and live in a Wildfire Zone) and whose needs are not met by the IOUs' proposed programs.
- Deep package will target the neediest households (the above customer segments as well as high use, hot climate zone, etc.).

Recommendation #6: Aliso Canyon Best Practices

Energy Savings Assistance Program - Pilot Plus & Pilot Deep Program (2021-2026)

- Target customers: the neediest and those with highest opportunity to achieve the specified percent savings per household.
  - Customers that have been identified as being in multiple need states or meet Demographic, Financial, Geographic, or Health criteria. For example, customers who are high usage and medical baseline, and may also be a part of other, multiple need states be prioritized over customers who are only high usage.
  - Customers who have already received the IOUs' basic ESA package, and based on the initial home assessment, will benefit from ESA services beyond what the IOUs can provide in their standard program offerings.
  - New or previously unwilling customers who have not received the IOUs' basic ESA package but have needs beyond what the IOUs can provide in their standard program offerings.
- Pilot Workshop to be held by October 1, 2021. Workshop will introduce the IOUs' preliminary implementation plans for the Pilot Deep and Pilot Plus measure packages and seek stakeholder feedback.
- Following workshop, IOUs will file Tier 2 advice letters detailing Pilot implementation. Implementation of Pilot Plus & Pilot Deep programs by Q3 2022.

Recommendation #7: Coordination with LIHEAP

LIOB Recommendation

a) The Board recommends the Commission direct IOUs to establish data sharing agreements between Local Service Providers (LSPs), CSD, and IOUs to effectively target LIHEAP assistance to at-risk customers (i.e. customers at-risk of losing services due to nonpayment) as part of their transition plans.

b) The Board recommends the Commission direct IOUs to explore opportunities for and fund joint program enrollment pilots with LSPs to facilitate enrollment of at-risk low-income IOU customers in LIHEAP and IOU CARE Medical Baseline, Percentage of Income Payment Plans (PIPP), and the Arrearage Management Program (AMP) using a single streamlined intake process as part of their transition plans. CSD, working together with selected LSPs, would participate in the development and administration of such pilots.

Recommendation #7: Coordination with LIHEAP

- As part of D.20-06-003, utilities have launched data-sharing portals with CSD and LIHEAP Local Service Providers.
- Anticipated state budget allocation for utility arrears will necessitate CPUC-CSD coordination, including targeting funds to highest risk customers.
  - Phase II of COVID Arrears proceeding (R.21-02-014) will explore opportunities for targeting assistance.
- PIPP pilot development underway in Disconnections proceeding (R.18-07-005), anticipated to include dual enrollment in AMP and PIPP, can explore other opportunities for leveraging multiple programs.
- Different eligibility criteria for programs may make single intake process challenging.

Recommendation #8: Referral to Weatherization and Other Programs as Part of AMP

LIOB Recommendation

a) The LIOB recommends that the Commission direct IOUs to include a referral to ESA, LIWP, and other weatherization programs in the AMP enrollment process, as part of their transition plans.

b) The LIOB recommends that the Commission direct IOUs to work closely with SOMAH, LIWP, CARE and ESA service providers, CBOs and community stakeholders, to construct enrollment best practices with improved outreach, program eligibility and tailored household energy assessments to better target ratepayer investments that enhance energy savings and reduce energy burden.

Recommendation #8: Referral to Weatherization and Other Programs as Part of AMP

- (8a) Utilities generally indicated they are supportive of this recommendation and already refer customers to ESA when eligible
  - PG&E specifically indicated this is a part of its standard AMP enrollment process
  - Other utilities did not identify specific barriers to implementing this recommendation and indicated they would explore

- (8b) ESA/CARE PD directs large IOUs to hold a workshop with other low income and/or clean energy program administrators (at a minimum to include ESA, CARE, FERA, SGIP, SOMAH, Arrearage Management Plan (AMP), Percentage of Income Payment Plan (PIPP), CSD low income assistance programs, DAC programs) within 120 days after approval of decision.
  - The purpose of the workshop is to discuss how the various program administrators can better align customer eligibility for the programs, increase referrals and enrollment across multiple programs, and increase coordination efforts.

Questions?

APPENDIX

California Public Utilities Commission

Recommendation #5: Define and Measure Success

- The IOUs reporting template – customer retention

Customer Retention - Post June 30, 2021							
Program	Jun	Jul	Aug	Sep	Oct	Nov	Dec
CARE Post-Enrollment Verification Rate [1]		50%					
Total PEV Requests		10					
Total PEV Approved		5					
FERA Post-Enrollment Verification Rate [2]		50%					
Total PEV Requests		4					
Total PEV Approved		2					
Number Remaining on AMP [3]							
Number Remaining on 12-Month Pay Plans (Residential) [4]							
Number Remaining on 12-Month Pay Plans (Small Business) [5]							

[1] xx customers enrolled in CARE during protections period (3/16/20 to 6/30/21). Number of enrolled CARE customers (i.e. master metered customers counted as multiple customers)

[2] xx customers enrolled in FERA during protections period (3/16/20 to 6/30/21).

[3] xx customers enrolled in AMP during protections period (3/16/20 to 6/30/21).

[4] xx customers enrolled in 12-Month Pay Plans (Residential) during protections period (3/16/20 to 6/30/21).

[5] xx customers enrolled in 12-Month Pay Plans (Small Business) during protections period (3/16/20 to 6/30/21).

Recommendation #5: Define and Measure Success

- Residential customers payment plans

New Payment Program Enrollments - Impacted Customers[6]							
Bill Payment Assistance Programs							
Program	Jun	Jul	Aug	Sep	Oct	Nov	Dec
LIHEAP							
REACH/EAF/GAF/N2N							
Residential Payment Plans							
New Enrollments	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1-3 Months							
4-6 Months							
7-9 Months							
10-12 Months							
>12 Months							
Total New Enrollments							
Completed	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1-3 Months							
4-6 Months							
7-9 Months							
10-12 Months							
>12 Months							
Total Kept							
Broken	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1-3 Months							
4-6 Months							
7-9 Months							
10-12 Months							
>12 Months							
Total Broken							

Recommendation #5: Define and Measure Success

- Small business payment plans

Small Business Payment Plans							
Active Payment Plans	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1-3 Months							
4-6 Months							
7-9 Months							
10-12 Months							
>12 Months							
Total New Enrollments							
New Enrollments	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1-3 Months							
4-6 Months							
7-9 Months							
10-12 Months							
>12 Months							
Total New Enrollments							
Completed	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1-3 Months							
4-6 Months							
7-9 Months							
10-12 Months							
>12 Months							
Total Kept							
Broken	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1-3 Months							
4-6 Months							
7-9 Months							
10-12 Months							
>12 Months							
Total Broken							

Recommendation #5: Define and Measure Success

- Arrearage Management Plan

Arrearage Management Plan [7]							
Program	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Incremental Monthly Enrollment	25	25					
Total AMP Enrollment as of End of Month	100	120					
Customer Completed AMP	5	5					
Customer Voluntarily Opt-Out / Account Closure	0	0					
Customer Removed Involuntarily from AMP	10	0					
Customers Removed Involuntarily from AMP Disconnected [8]							
Percentage of Customers Removed Involuntarily Disconnected [9]							
[7] Customers removed from AMP before completing the program, due to not meeting program requirements.							
[8] Customers disconnected within six months of AMP removal.							
[9] Percentage of customers removed from AMP that have been disconnected.							

Item 9: CARE/ESA Status Reports, ESA Unsent Funds, COVID-19 Impacts

Joint Investor Owned Utilities

1:30 – 2:15 PM

Joint IOU Report of the CARE and ESA Programs

Low Income Oversight Board Meeting
Webex
June 17, 2021

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.

2021 YTD CARE Program Updates*

Authorized 2021 Program Budgets Expenditures				
Utility	**2021 Budget**	**YTD Expenditures**	**%**	**YTD Rate Discounts**
PG&E	$9,510,637	$5,535,207	58%	$288,167,912
SCE	$3,289,534	$1,096,913	33%	$163,717,139
SDG&E	$3,660,217	$1,040,199	28%	$40,509,613
SoCalGas	$5,045,561	$1,996,303	40%	$74,716,632
Total	$25,008,052	$14,727,454		$768,697,000

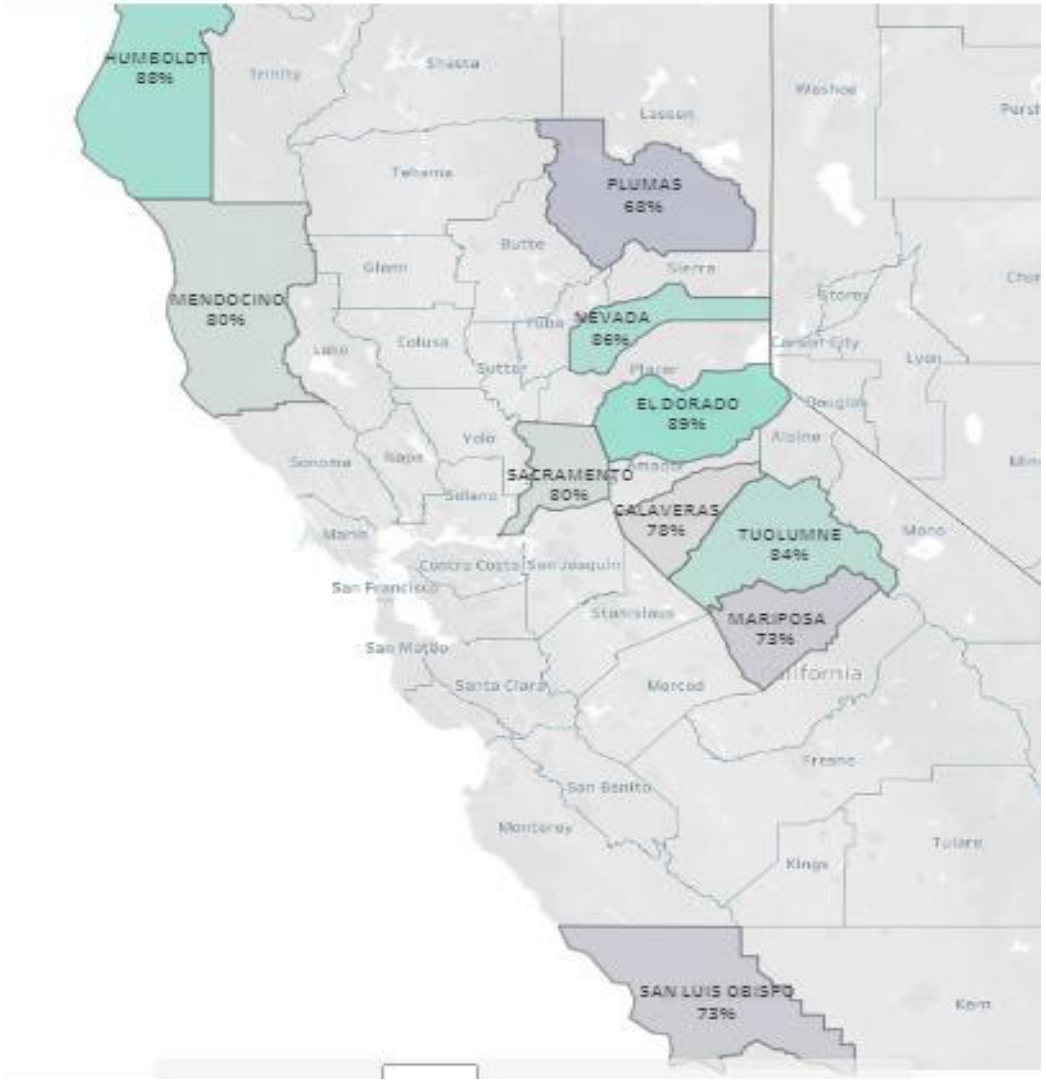
2021 YTD Enrollment and Penetration						
Utility	**Total Residential Customers**	**Estimated Eligible Customers**	**Eligible Rate**	**Customers Enrolled**	**Penetration Rate**	**Newly Enrolled Customers**
PG&E	5,583,279	1,447,571	26%	1,590,231	110%	77,664
SCE	4,497,228	1,349,716	30%	1,446,195	107%	56,178
SDG&E	1,360,611	293,584	22%	343,087	117%	12,347
SoCalGas**	5,667,264	1,710,846	30%	1,808,053	106%	87,353
Total	17,108,382	4,801,717		5,187,566		233,542

- Authorized budgets pursuant to Decision 19-06-022 for the 2021 Bridge Period. 2021 YTD through April 30, 2021, as reported in the IOU ESA-CARE Monthly Report (filed May 21, 2021). Pursuant to an extension granted by the Energy Division Executive Director on May 21, 2021, SDG&E presents YTD actuals through March 31, 2021, due to unforeseen issues resulting from SDG&E's recently implemented Customer Information System (Envision).
- ** Total residential gas households. This includes sub-metered households.

Pacific Gas and Electric Company | Southern California Edison | SDGE A Sempra Energy utility | SoCalGas A Sempra Energy utility

CARE Program *CARE Penetration map*

PG&E

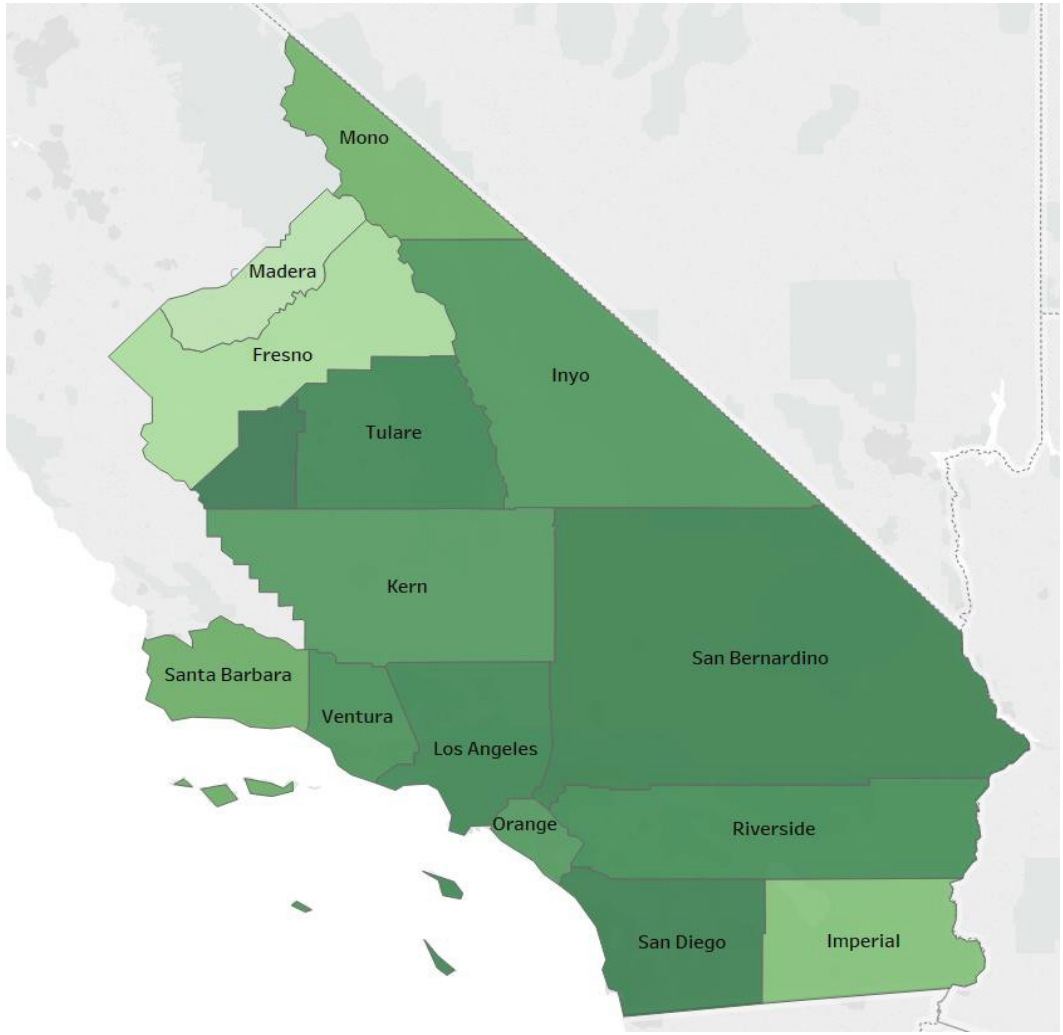


County	Penetration Rate*
PLUMAS	68%
MARIPOSA	73%
SAN LUIS OBISPO	73%
CALAVERAS	78%
SACRAMENTO	80%
MENDOCINO	80%
TUOLUMNE	84%
NEVADA	86%
HUMBOLDT	88%
EL DORADO	89%

*Represents PG&E counties with the lowest penetration rates, as of April 30, 2021.
*Excludes counties with less than 1,000 estimated eligible households

CARE Program *CARE Penetration map*

SCE



County	Penetration Rate*
Kings	112%
San Bernardino	140%
Los Angeles	102%
Riverside	133%
Tulare	98%
Kern	71%
Ventura	97%
Orange	89%
Santa Barbara	65%
Inyo	77%
Mono	46%
Imperial**	44%
Fresno**	10%
San Diego**	100%
Madera**	0%

*Represents the penetration rates for all SCE counties effective April 30, 2021.
**Represents counties with less than 1,000 estimated eligible households

CARE Program *CARE Penetration map*

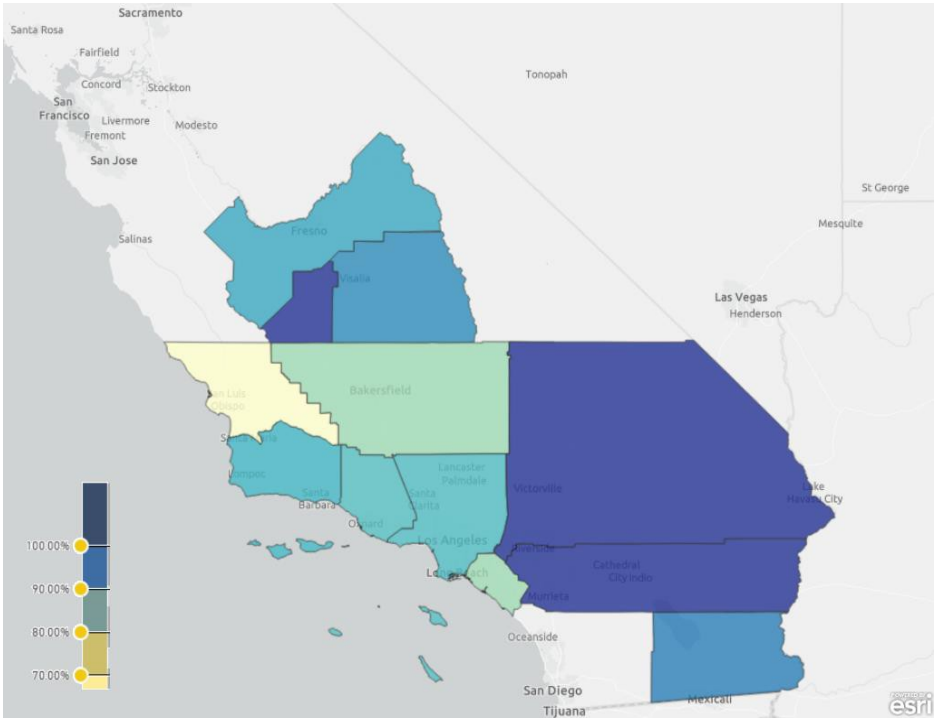
SDG&E

Zip codes with lowest penetration (overall)	
City	**Penetration Rate**
Laguna Nigel	20%
Coronado	33%
La Jolla	47%
Dana Point	56%
Jamul	57%
Pauma Valley	60%

*Represents SDG&E zip codes with the lowest penetration rates, as of March 30, 2021.

CARE Program *CARE Penetration map*

SoCalGas



County	Penetration Rate *
San Bernardino	158%
Riverside	136%
Kings	111%
Imperial	105%
Tulare	104%
Fresno	102%
Santa Barbara	101%
Los Angeles	99%
Ventura	98%
Kern	89%
Orange	88%
San Luis Obispo	74%

* 2021 YTD through April 30, 2021, as reported in the IOU ESA-CARE Monthly Report (filed May 21, 2021).

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.

2021 YTD ESA Program Budget Updates *

2021 Authorized Program Budgets and YTD Expenditures			
Utility	**Authorized 2021 Budget [1]**	**YTD Expenditures [2]**	**%**
PG&E	$127,394,116	$62,972,703	49%
SCE	$40,926,751	$23,569,768	58%
SDG&E	$16,460,022	$5,084,101	31%
SoCalGas	$67,066,667	$27,883,032	42%
Total	$251,847,557	$119,509,604	47%

[1] Authorized budgets pursuant to Decision 19-06-022 and Bridge Funding Advice Letters.

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

* 2021 YTD through April 30, 2021, as reported in the IOU ESA-CARE Monthly Report (filed May 21, 2021).

Energy Savings Assistance Program

2021 YTD Energy Savings Targets

2021 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	20,755,784	7,808	207,270,528	10,744,538	10.0%	0.1%	N/A	N/A
SCE	13,451,831	N/A	44,681,841	N/A	30.1%	N/A	N/A	N/A
SDG&E	384,675	4,497	12,317,952	738,912	3.1%	0.6%	N/A	N/A
SoCalGas	N/A	231,586	N/A	10,891,445	N/A	2.1%	N/A	N/A
TOTAL	34,592,289	243,891	264,270,321	22,374,895			N/A	N/A

[1] 2021 through April 30, 2021, as reported in the IOU ESA-CARE Monthly Report (filed May 21, 2021).

[2] Derived from average CARE Customers Usage for PY 2020 (Annual Report CARE Table 9) multiplied by April 2021 homes treated and annualized.

[3] Not Applicable since savings targets were not proposed in the IOUs bridge funding ALs.

Energy Savings Assistance Program

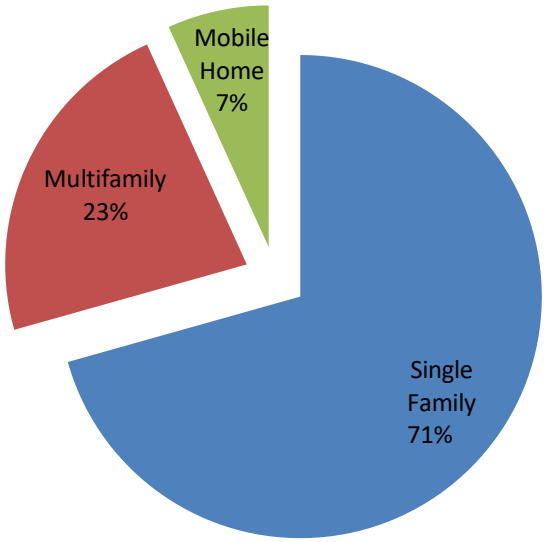
Top Two Drivers for Energy Savings Shortfalls below Target

IOU	Drivers
PG&E	1. PG&E's ESA Program was on pause for in excess of two months due to the COVID-19 pandemic. Barring something unforeseen, it will be a challenge to meet this year's homes treated goal. 2. PG&E is forecasting to not meet ESA's therm target due to (1) the introduction of LED lighting interactive effects, which PG&E indicated in the Mid-Cycle Advice Letter; and (2) transition to using Final Impact Evaluation results beginning with reporting for July 2019. (Final Impact Evaluation results are much lower than the Phase 1 results used in the Mid-Cycle Advice Letter).
SCE	1. Enrollment rates are increasing each month and since February, have surpassed SCE's post-COVID impact enrollment forecasts as contractors continue to ramp up operations. Through April, SCE treated 27,429 households, of which 10,258 were retreatments. Focusing on retreatment customers during the Bridge Funding period may lead to lowered savings values as there is less opportunity to install energy saving measures in a home that has previously participated. 2. In March, SCE went through a corporate wide Customer Service System replacement. ESA direct mail and email activities were reduced to help decrease customer calls to SCE as the system goes through stabilization.
SoCalGas	1. Lower therm savings per unit installed, compared with the assumptions used to develop the original savings targets. 2. Enrollment rates are below original forecast and goals. This is a result of the challenges the program faces in finding and enrolling new, untreated, eligible and willing customers as well as impacts from COVID-19 on program participation.
SDG&E	1. SDG&E is currently on target to meet the bridge period homes treated goal. However, bridge period savings goals were not established; therefore, SDG&E is not currently below savings targets.

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.

ESA 2021 SW Participation By Type



2021 YTD Households Treated

2021 YTD Households Treated [1]						
Utility	**Bridge Goal**	**First Touch**	**Go-Backs**	**Total**	**Total as % of 2021 Goal**	**Total as % of Eligible ESA HH [2]**
PG&E	50,000	9,789	23,857	33,646	67%	2.09%
SCE	43,562	17,171	10,258	27,429	63%	2.02%
SDG&E	5,973	1,590	1,850	3,440	58%	1.17%
SoCalGas	60,000	18,182	16,460	34,642	58%	1.78%
Total	159,535	46,732	52,425	99,157		

[1] 2021 through April 30, 2021, as reported in the IOU ESA-CARE Monthly Report (filed May 21, 2021).

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

Pacific Gas and Electric Company

Southern California Edison — An Edison International Company

SDGE — A Sempra Energy utility

SoCalGas — A Sempra Energy utility

Energy Savings Assistance Program

2021 MULTIFAMILY UPDATES

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

- **PG&E**: As of April 2021, PG&E's SPOC made 221 referrals across PG&E and non-PG&E multifamily programs which resulted in 27 ESA in-unit referrals.
- **SCE:** In January 2021, SCE redesigned the MF CAM brochure to include new measures and a sample energy and cost savings calculation to highlight the benefits of the program. Approximately 500 brochures including a newly developed CAM Introduction Letter, were sent to prospective customers. Service Providers are contacting customers that received the mailer to follow up. In April 2021, SCE completed the process of onboarding and training two additional CAM Service Providers.

- **SDG&E**: In 2021, SDG&E's SPOC conducted 18 referrals across its ESA & ESA CAM programs.
- **SoCalGas:** Through April 30, 2021, SoCalGas' SPOCs have continued building the pipeline of CAM projects. SoCalGas added several projects in conjunction with Project Homekey. This is a State driven program to convert motels to MF living facilities for the homeless. Thus far, SoCalGas has identified thirty-eight (38) Homekey properties, completed site assessments on fifteen (15) Homekey projects with eight (8) of those projects having been approved for participation in the ESA CAM program

Common Areas: **All IOUs continue implementing their Common Area Measures Initiative Implementation Plans in 2021.**

- **PG&E:** PG&E has successfully completed and paid 40 ESA CAM projects and treated 345 buildings and 3,252 units in 2021. Additionally, the program expects to enroll and audit 195 buildings for 2021.
- **SCE:** Deed Restricted: In progress – 21 Whole Building, 17 Common Area, 5 In-Unit. Deed Restricted: Completed – 10 Whole Building, 5 Common Area, 11 in-unit. Market Rate: In progress – 19 in-unit. Market Rate: Completed – 23 in-unit.
- **SDG&E:** April 2021, SDG&E's ESA Program MF CAM implementer continued targeted marketing to potential ESA MF CAM properties, including re-syndication projects in SDG&E's service territory. Three properties were treated in April for a total of 12 properties in 2021. In addition, six properties are currently receiving measure installations and there are a total of 10 properties pending energy assessments/audits.
- **SoCalGas:** As of April 30, 2021, SoCalGas completed eight (8) projects. There are several projects on hold due to supply chain issues with boiler manufacturers. SoCalGas is working with Raypak and Lochinvar to reduce delivery timeframes to ensure timely installations.
-

ENERGY EDUCATION

The statewide Energy Education Resource Guide has been finalized and the IOUs and SMJU's have rolled 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

As of Apr 2021 Summary of Tribal Responses			
OUTREACH STATUS	QUANTITY	TRIBES	
Tribes completed ESA Meet & Confer	23	Bear River Band of Rohnerville Rancheria, Berry Creek Rancheria, Big Sandy Rancheria, Laytonville Rancheria (Cahto), Cloverdale Rancheria, Cold Springs Rancheria of Mono Indians, Coyote Valley Band of Pomo Indians, Guidiville Rancheria, Upper Lake Rancheria, Hoopa Valley Tribe, Hopland Reservation, Ione Band of Miwok Indians,	Karuk Tribe, Manchester Point Arena Rancheria, Mooretown Rancheria, North Fork Rancheria, Redwood Valley Rancheria, Round Valley Reservation, Sherwood Valley Rancheria, Wiyot Tribe (Table Bluff), Tuolumne Rancheria, United Auburn Indian Community, and Yurok Tribe
Tribes requested outreach materials or applications	11	Big Valley Rancheria, Bear River Band of Rohnerville Rancheria, Berry Creek Rancheria, Cold Springs Rancheria of Mono Indians, Coyote Valley Band of Pomo Indians,	Karuk Tribe, North Fork Rancheria, Picayune Rancheria, Pinoleville Reservation, Sherwood Valley Rancheria, and Wiyot Tribe (Table Bluff)
Tribes who have not accepted offer to Meet and Confer	22	Big Lagoon Rancheria, Blue Lake Rancheria, Cher-Ae Heights Indian Community of Trinidad Rancheria, Chicken Ranch Rancheria, Colusa Rancheria (Cachil Dehe Wintun), Cortina Rancheria ,Dry Creek Rancheria, Elem Indian Colony (Sulphur Bank), Enterprise Rancheria of Maidu Indians, Jackson Rancheria, Middletown Rancheria,	Paskenta Rancheria, Picayune Rancheria, Pit River Tribes, Redding Rancheria, Santa Rosa Rancheria (Tachi-Yokut), Santa Ynez Band of Chumash Indians, Scotts Valley Band of Pomo Indians, Shingle Springs Rancheria, Stewarts Point Rancheria (Kashia Pomo), Table Mountain Rancheria, and Yocha Dehe Wintun Nation (Rumsey)
Non-Federally Recognized Tribes who participated in Meet & Confer	2	Dunlap Band of Mono	North Fork Mono
Tribes and Housing Authority sites involved in Focused Project/ESA Partnership offer on Tribal Lands	16	Complete: Yurok Tribe To Contact in 2021: Karuk Tribe, Round Valley Reservation, and Wiyot Tribe (Table Bluff)	In Process for 2021: Bear River Band of Rohnerville Rancheria, Berry Creek Rancheria, Big Sandy Rancheria, Cloverdale Rancheria, Hoopa Valley Tribe, Picayune Rancheria, Redwood Valley Rancheria, Sherwood Valley Rancheria, Guidiville Rancheria, and Manchester-Pt. Arena Rancheria
HA and Tribal Temporary Assistance for Needy Families (TANF) offices who received outreach (this includes email, U.S. mail, and/or phone calls)	38	**Housing Authority Offices**: Bear River Band of Rohnerville Rancheria, Berry Creek Rancheria, Big Sandy Rancheria, Big Valley Rancheria, Cher-Ae Heights Indian Community of The Trinidad Rancheria, Cloverdale Rancheria, Dry Creek Rancheria, Elem Indian Colony, Enterprise Rancheria of Maidu Indians, Federated Indians of Graton Rancheria, Fort Independence Reservation, Greenville Rancheria, Hoopa Valley Tribe, Ione Band of Miwok Indians, Karuk Tribe, Laytonville Rancheria, North Fork Rancheria, Picayune Rancheria, Pinoleville Reservation, Pit River Tribes, Round Valley Reservation, Santa Rosa Rancheria Tachi-Yokut, Stewarts Point Rancheria (Kashaya Pomo), Susanville Indian Rancheria, Tejon Indian Tribe, Tule River Indian Tribe, Upper Lake Rancheria, Washoe Tribe, Wilton Rancheria, and Yurok Tribe	**TANF Offices**: California Department of Social Services CALWORKS and Family Resilience Branch, Federated Indians of Graton Rancheria, Hoopa Valley Tribe, Karuk Tribe, North Fork Rancheria, Susanville Indian Rancheria, Tuolumne Rancheria, and Owens Valley Career Development Center
HA and TANF offices who participated in Meet and Confer	13	**Housing Authority Offices**: Bear River Band of Rohnerville Rancheria, Berry Creek Rancheria, Big Sandy Rancheria, Enterprise Rancheria of Maidu Indians, Hoopa Valley Tribe, Karuk Tribe, North Fork Rancheria, and Picayune Rancheria	**TANF Offices:** Karuk Tribe, North Fork Rancheria, Susanville Indian Rancheria, Tuolumne Rancheria, and Owens Valley Career Development Center

Energy Savings Assistance Program

Summary of Tribal Outreach Activities for 2021:

- PG&E's Tribal Consultation Plan for program year 2021 consisted of outreach to the leadership of the remaining 16 tribal communities who had not responded to contact attempts. Also, outreach plan included outreach to 14 Tribe Housing Authority Offices and 8 Tribal Temporary Assistance for Needly Families (TANF) offices. Outreach included email communication and phone calls with offers of in-person meetings, webinars and /or phone call consultations.

- In addition to the offer to meet and confer, outreach materials were sent which included information on customer protections during COVID and information about wildfires.

- PG&E's tribal liaison who collaborates with all tribes in PG&E service territory is a point person for Tribal Councils, leadership and government staff. The liaison communicates the offer to meet and confer every time there is an audience with the tribal communities.

- In addition to in-person and webinar meetings with three tribes, PG&E met with eight Tribal Temporary Assistance for Needy Families (TANF) offices, nine Housing Authority offices, and the California Department of Social Services CALWORKS and Family Resilience Branch.

Energy Savings Assistance Program

SCE Tribal Outreach for Low Income Programs

Pursuant to D.16-11-022 and D.17-12-009, SCE has met the goal of offering the ESA Program to all tribes in SCE service territory by 2020.

- SCE continuously offers low-income programs to all tribal communities within its service territory through the following actions:
  - Identify and confirm tribal contacts for each territory
  - Regular face-to-face and digital meetings
  - Participating in tribal community events
  - Presentations to their tribal councils
  - Offering virtual enrollments where feasible
- In April 2021, SCE did a targeted direct mail campaign to 3 tribal communities. Each letter provided the name and phone number for their local contractor to schedule an assessment. An ESA contractor participated in Morongo's Annual Earth Day Drive Through Celebration on April 22, 2021, to provide program awareness in the tribal community.

#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 Colorado River Indian Tribes (CRIT)	Chemehuevi Death Valley Timbisha Shoshone	Soboba Band of Luiseño Indians	Benton Paiute Tribe Bishop Paiute Tribe Bridgeport Paiute Indian Colony Tule River Indian Tribe Morongo Band of Mission Indians

Note: Marketing and outreach strategies and material to tribal members is tailored according to requests during coordination with either tribal council or housing authority.

Energy Savings Assistance Program

SDG&E Tribal Efforts for Low Income Programs

Tribal Liaison Activities

- SDG&E's tribal liaison works with all tribes in our service territory, and is a point person for Tribal Councils, leadership and government staff.
- Plans for 2021 to target specific tribes with individualized offers of enrollment and/or program assistance are in development, per request from LIOB members in January. Plans will potentially include:
  - Collaboration with tribal governments in order to secure "Homeowner" letters to facilitate ESA program enrollment
  - Partnering with one contractor to offer "whole neighborhood" approach for outreach and enrollment
  - Conducting mass outreach and enrollment efforts to eligible customers

Outreach Activities

- SDG&E's outreach team has established paid partnerships via SCAIR and SCTCA.
- All tribes in San Diego's service territory can use these organizations for resources.
- SDG&E works closely with the two associations to make sure that tribal community members are informed about all relevant SDG&E programs and services.

2021			
	Activity Type	Count	Est. Reach
SCAIR	Events	3	550
	Messaging	10	5,160
	Presentation	0	0
	Total	13	5,710
SCTCA	Events	0	0
	Messaging	5	7,250
	Presentation	1	15
	Total	6	7,265
	Total Activity	**19**	**12,975**

*SCTCA – Southern California Tribal Chairmen's Association
*SCAIR – Southern California American Indian Resource Center

Energy Savings Assistance Program

SDG&E Tribal Outreach for Low Income Programs

Federally Recognized Tribes in SDG&E's Service Territory		Outside of Service Territory	Outreach Efforts
21 Tribes		5 Tribes	
• **Barona** Band of Mission Indians • **Campo Kumeyaay** Nation • **Capitan Grande Reservation** • **Ewiiaapaayp** Band of Kumeyaay Indians (Cuyapaipe Reservation) • **Inaja & Cosmit** Band of Indians • **Jamul Indian Village** • **Juaneno** Band of Mission Indians • **Kwaaymii** • **La Jolla** Band of Mission Indians • **La Posta** Band of Mission Indians • **Los Coyotes** Band of Mission Indians • **Manzanita** Band of the Kumeyaay Nation • **Mesa Grande** Band of Mission Indians	• **Pala** Band of Mission Indians • **Pauma** Band of Lusieno Indians • **Rincon** Band of Luiseno Indians • **San Luis Rey** Band of Mission Indians • **San Pasqual** Band of Mission Indians • Iipay Nation of **Santa Ysabel** (Santa Ysabel Reservation) • **Sycuan Band of Kumeyaay Nation** • **Viejas Band of Kumeyaay Indians**	• **Cahuilla** Band of Indians • **Cupeno** Band of Indians • **Pechanga** Band of Luiseno Indians • Fort Yuma **Quechan** Indian Tribe • **Soboba** Band of Luiseno Indians	• Ongoing outreach conducted through SCAIR and SCTCA • SDG&E kicked off direct outreach for a "whole neighborhood" offer in Q1 2021 • Meetings have been scheduled with tribes to discuss assistance program offerings

Energy Savings Assistance Program

SoCalGas Tribal Outreach for Low Income Programs

Federally Recognized Tribes in SoCalGas' Service Territory		Tribes with SoCalGas Residential Meters	Tribes Reached Out To for Tribal Consultation
20 Tribes		**7 Tribes**	**4 Tribes**
• Agua Caliente Band of Cahuilla Indians • Augustine Band of Cahuilla Indians • Cabazon Band of Mission Indians • Cahuilla Band of Mission Indians of the Cahuilla Reservation • Chemehuevi Indian Tribe of the Chemehuevi Reservation • Chumash Tribe of Indians • Fort Mojave Indian Tribe • Los Coyotes Band of Cahuilla and Cupeño • Indians • Morongo Band of Cahuilla Mission Indians • Pechanga Band of Luiseño • Mission Indians of the Pechanga Reservation • Ramona Band of Cahuilla Indians	• San Manuel Band of Serrano Mission Indians of the San Manuel Reservation • Santa Rosa Band of Cahuilla Indians • Santa Ynez Band of Chumash Mission Indians of the Santa Ynez Reservation • Serrano Nation of Mission Indians • Soboba Band of Luiseño Indians • Tachi Yokut Tribe of Indians • The Juaneño • Band of Mission Indians • Torres-Martinez Desert Cahuilla Indians • Tule River Indian Tribe of the Tule River Reservation • Twenty-Nine Palms Band of Mission Indians of California	• Agua Caliente Band of Cahuilla Indians • Cabazon Band of Mission Indians • Morongo Band of Cahuilla Mission Indians • San Manuel Band of Serrano Mission Indians of the San Manuel Reservation • Santa Rosa Band of Cahuilla Indians • Santa Ynez Band of Chumash Mission Indians of the Santa Ynez Reservation • Soboba Band of Luiseño Indians	• Agua Caliente Band of Cahuilla Indians • Morongo Band of Cahuilla Mission Indians • Santa Rosa Band of Cahuilla Indians • Soboba Band of Luiseño Indians **Additional Tribes Outreached for The ESA Program** • Augustine Band of Cahuilla Indians • Cahuilla Band of Mission Indians of the Cahuilla Reservation • Pechanga Band of Luiseño Mission Indians of the Pechanga Reservation • Tachi Yokut Tribe of Indians • The Juaneño Band of Mission Indians • Torres-Martinez Desert Cahuilla Indians • Tule River Indian Tribe of the Tule River Reservation • Twenty-Nine Palms Band of Mission Indians of California

Energy Savings Assistance Program

SoCalGas Tribal Outreach for Low Income Programs

SoCalGas Additional Tribal Outreach for Low Income Programs

- Due to COVID-19, all events have been either cancelled, postponed or made virtual. Community Based Organizations and SoCalGas Customer Assistance Outreach Staff continue to actively participate in outreach efforts via virtual means.

- In March 2021, SoCalGas formally partnered with Southern California Indian Center (SCIC), a community based organization dedicated to serving the American Indian, Alaskan Native, and Native Hawaiian communities of Los Angeles, Orange, and Riverside Counties. Through April 30, 2021, SCIC has participated in building awareness on Customer Assistance Programs through the following events:
  - Wellness Training Events to over 50 attendees
  - Various outreach events with over 20 attendees
  - Mountain Center Outreach Event with over 183 attendees

- ESA Program Manager and Regional Public Affairs worked on strategy to best provide information to tribal leaders and looking at outreach efforts to specific tribes and tribal organizations.

Joint IOU's Unspent Funds for Energy Savings Assistance Program

Low Income Oversight Board Meeting
Webex
June 17, 2021

PG&E's Unspent ESA Program Funds

Total Remaining ESA Unspent Funds ($M)	
Remaining Unspent/Uncommitted 2009-2020 funds [1][2]	$78.44
Unspent/Committed funds for 2021 ESA Bridge Period [3]	$64.42
Total Unspent Funds as of 04/30/2021	**$142.86**

1. Unspent/Uncommitted 2009-2020 Funds is the remaining amount of the ESA program funds collected from 2009-2020 program cycles that have not been authorized for 2021 ESA Program Bridge Period.
2. Unspent funds may only be used for ESA program activities. In Application (A.) 19-11-003 et. al., PG&E proposes using unspent funds to offset future revenue collections for the 2021-2026 period.
3. Committed funds include remaining authorized bridge funding amount approved in PG&E Advice Letter 4351-G-B/6035-E-B for January 1, 2021 - June 30, 2021, reserved/contracted amount with signed customer agreements for MF CAM activities, and estimated amount for PPRS credit per Resolution E-5074.

SCE's 2017-2020 Unspent Funds for ESA Program

Total Remaining Unspent Funds ($M)	
Remaining 2009-2016 Unspent/Uncommitted fund	$ 56.22
Total 2017-2020 Revenue Remaining as of 12/31/2020	$ 15.15
Total 2017-2020 Unspent Funds - applied to cover Actual Expenses remaining as of 12/31/2020	$ 29.02
Total Remaining Unspent Funds as of 12/31/2020	**$ 100.39**
Total Unspent funds for Bridge Funding Activities	$ 40.92

- The revenue remaining comes from the budget authorized in Decision (D.) 16-11-002 and Resolution E-4855 was $318.37 million and indicates what SCE is authorized to collect through 2020.
- Unspent funds total as of December 31, 2020.
- The term "Unspent Funds" includes uncommitted and committed unspent funds. Unspent funds may only be used for ESA program activities. In Application (A.) 19-11-003 et. al., SCE proposing using unspent funds to offset future revenue collections for the 2021-2026 period.
- Total for bridge funding activities is based on the authorized bridge funding amount approved in SCE Advice Letter 4053-E, effective December 16, 2019.

SDG&E's Unspent Funds for ESA Program

Total Remaining Unspent Funds ($M) [1]	
2009-2016 Unspent funds [2]	$23.32
Total 2017-2021 Revenue Collected as of 4/30/2021 [3]	+ $90.42
Total 2017-2021 Actual Expenses as of 4/30/2021 [4]	- $80.27
Total Remaining Unspent Funds as of 4/30/2021 [5]	= $33.47
Total allocated as of 4/30/2021 [5]	- $9.61
Total Remaining Unspent Funds as of 4/30/2021 [6]	= $23.86
Total funding requested for 2021 [7]	$27.74

1. Unspent funds are only available for ESA activities.

2. 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 redistribution to PY2019 as authorized in SDG&E Advice Letter 3250-E/2688-G.

3. The revenues collected were less than the authorized budget levels in D.16-11-022, Resolution E-4884 and budgets approved in AL 3250-E/2688-G.

4. Reflects expenses from ESA Tables 1 + 1A, net of manual adjustments.

5. $9.61M of Unspent/Committed funds remain from authorized amount of $12,959,793 in Resolution E-4884.

6. Please note the financial information presented is preliminary and will be finalized upon completion of the 2021 Annual Report.

7. 2021 budget amount reflected in A.19-11-005, pending Commission decision. As directed in D.20-08-033, SDG&E filed Advice Letter 3612-E/2905-G for bridge funding activities for January 1 through June 30, 2021, using uncommitted unspent funds for the bridge period. SDG&E Advice Letter 3612-E/2905-G was approved by the Commission's Energy Division effective September 23, 2020.

Note: This does not include cumulative interest collections in the ESA balancing accounts.

Energy Savings Assistance Program

Unspent/Uncommitted ESA Funds

SoCalGas Remaining Unspent Funds

Total Remaining Unspent Funds ($M)	
Remaining 2009-2016 Unspent Funds [1]	$125.15
2017-2021 Revenues Collected as of 4/30/2021	$500.80
2017-2021 Total Expenses as of 4/30/2021 [2]	$422.50
2017-2021 Unspent Funds as of 4/30/2021 [3]	$78.30
Total Remaining Unspent Funds as of 4/30/2021	$203.44
Total Unspent Funds for Bridge Funding Activities [4]	$67.07
Footnotes	
[1] PY 2009-2016 Unspent Funds related to Revenues Collected.	
[2] PY 2017-2021 Total Expenses from Tables 1 and 1A.	
[3] PY 2017-2021 Unspent Funds related to Revenues Collected.	
[4] 2021 Budget amount requested in A.19-11-006, pending final decision. Pursuant to OP 9 of D.20-08-033, the IOU's are to use unspent and uncommitted funds during the bridge period before new revenue collections. Remaining unspent funds may be carried over for activity from the prior cycle including CAM and first-time treatments.	
*Unspent funds can only be used for ESA Program activities or returned to ratepayers.	

Energy Savings Assistance Program *Unspent/Uncommitted ESA Funds*

Top Two Drivers for Unspent Funds

IOU	Drivers
PG&E	1. ESA budget under spent due to not meeting homes treated goals in 2017-2018, and over estimation of measures to be installed. Current 2020 enrollment and installation rates are below pre-COVID-19 levels, impacting ESA spending. 2. 2009-2016 Unspent Funds committed for ESA 2017-2020 through Conforming and Mid-Cycle Advice Letters (Table 1A): a) Delayed launch of new measures pending 2018 Mid-Cycle Advice Letter Filing Resolution; b) Delayed start installing measures for Multi-Family Common Area Measure (CAM) as a result of transitioning to a deemed measures program based on options provided by Energy Division; c) COVID-19.
SCE	1. Enrollment and installation rates are still below pre-COVID-19 levels, however, are steadily rising month over month. Although eligible population has likely increased, willingness to enroll is still fluid during the pandemic. This has also impacted MF CAM progress, whose budget is taken from unspent funds. SCE is focused on retreating customers during the Bridge Funding period, whose budget is taken from unspent funds. There is less opportunity to install measures in a home that has already been served by ESA, which results in the installation of less measures. 2. So far, limited opportunities to leverage with CSD. Current projects have few potential measures that SCE can reimburse CSD for.
SoCalGas	1. Enrollment rates below the original forecast and goals. This is a result of the challenges the program faces in finding and enrolling new, untreated, eligible and willing customers as well as impacts from COVID-19 on program participation. 2. Lower forecast rates of feasibility for some of the program measures.
SDG&E	1. The total homes treated fell below the cycle treatment target for the program years 2017-2020. Additionally, an over estimation of measures installed caused lower than projected spend. 2. Due to COVID-19, the program suspension and pandemic further impacted enrollment and installation rates causing additional increases in unspent funds.

COVID-19 IMPACTS

CARE

ESA

PSPS

Low Income Oversight Board Meeting
Webex
June 17, 2021

Pacific Gas and Electric Company

Southern California Edison
An Edison International Company

SDGE
A Sempra Energy utility

SoCalGas
A Sempra Energy utility

PG&E Report on 2020* COVID-19 Impacts: Consumer Protections, CARE, ESA, PSPS

* March 1, 2020 – December 31, 2020

2020 COVID-19 Impacts: CARE/FERA Program

Since COVID-19, PG&E has put in place numerous consumer protections related to the CARE program to support our customers during this emergency.

Program Changes

- All Standard and high-usage post-enrollment verifications have been frozen for 12 months
- All CARE and FERA program removals have been halted
- All recertifications have been halted to avoid removing people from the discount

Expanded Outreach

- Aggressive promotion of consumer protections including email, TV and digital media, PG&E website
- Working with CBO partners to better inform customers of program changes
- Invited all LIHEAP providers to apply to become CARE Outreach Contractors
- Targeted and co-marketing of similar programs to expand reach, such as on the Fresh EBT mobile app and CA Lifeline program

2020 COVID-19 Impacts: CARE/FERA Program

Since March 1, 2020 PG&E has seen rapid enrollment increases in CARE and FERA:

- CARE enrollments have increased by over 198k customers
- FERA enrollments have increased by over 14k customers

Notable CARE Increases

County	Trend	% Increase
Placer	67% - 90%	28%
Marin	77% - 91%	23%
San Mateo	78% - 109%	27%
San Luis Obispo	58% - 73%	24%
Contra Costa	107% -143%	22%

Notable FERA Increases

County	Trend	% Increase
Marin	13% - 27%	145%
Napa	14% - 34%	88%
Sonoma	13% - 46%	96%
San Francisco	13% - 32%	94%
Santa Cruz	9% - 21%	84%

- **Tripled frequency** of emails and direct mail campaigns
- Increased the size of the target audience to **include the entire eligible residential customer base** with emails on file
- **70% of new enrollments** have come from online applications, driven by media and email campaigns

2021 COVID-19 Impacts: ESA Program Performance

2021 Program Summary ***Bridge Funding***			
January 1 – June 30 , 2021 Bridge Period	***Six-Month* Authorized/Planning Assumptions**	**2021 *YTD* Actual**	***YTD* %**
Bridge Budget	$89,527,819	52,885,722	59%
Homes Treated	50,000	33,646	67%
kWh Saved	N/A	20,755,784 kWh	N/A
Therms Saved	N/A	7,808 Therms	N/A

COVID-19 Impacts: ESA Program

PG&E's ESA program was suspended as of 3/19/20 due to COVID-19. The program was resumed in full on 5/31/20.

Dispersed 60-day advances to eligible Contractors. Six month Post Pandemic Return to Service Credit (PPRS) earning period to begin on 12/1/20.

Developed virtual training for contractors to increase efficiency and adhere to physical distancing guidelines.

Implemented a virtual education and enrollment pilot so that Contractors and customers have the option to enroll without face-to-face contact.

SCE Report on COVID-19 Impacts:
CARE Program
ESA Program
PSPS Update

SOUTHERN CALIFORNIA EDISON®

COVID-19 Impacts: CARE/FERA Program*

As of April 2021, SCE has continued to see an increase in CARE/FERA enrollments since Emergency Customer Protections went into effect in March 2020.

- CARE enrollments have increased by over 400,000 customers
- FERA enrollments have increased by over 12,000 customers

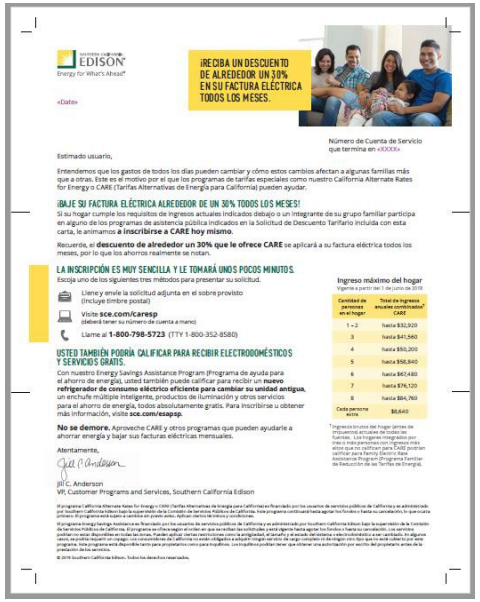
Outreach strategies have increased awareness and enrollment in SCE's Income Qualified Programs

- Targeted direct mail efforts average more than 130,000 letters per month.
- Email blast to eligible CARE/FERA customers reach approximately 270,000 customers each month.
- Updated pages on sce.com to include additional assistance programs including links to Low Income Home Energy Assistance (LIHEAP), Emergency Rental Assistance Program (ERAP), California LifeLine, and www.everyoneon.org for information about affordable internet and low-cost computers.

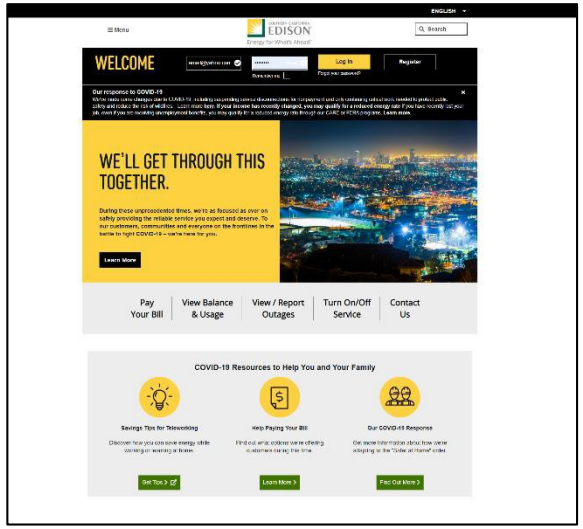
*Reflect data from Jan. 2021 - Apr. 2021

COVID-19 Impacts: Outreach Strategies

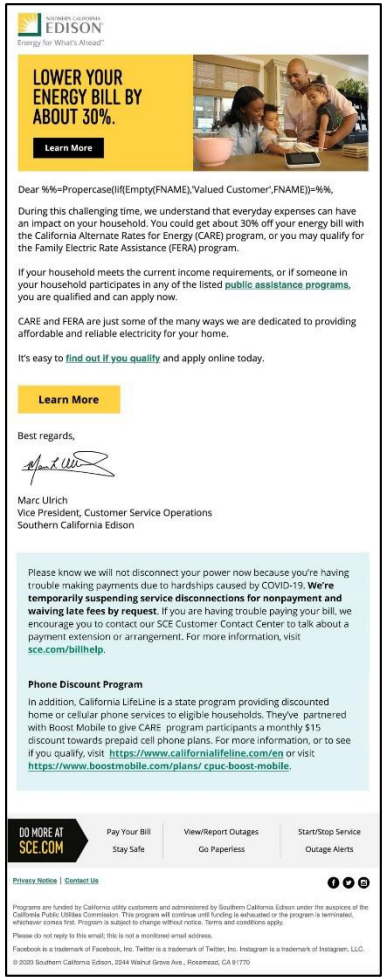
Increased awareness and enrollment in SCE's Income Qualified Programs



Targeted Direct Mail (Spanish Version)



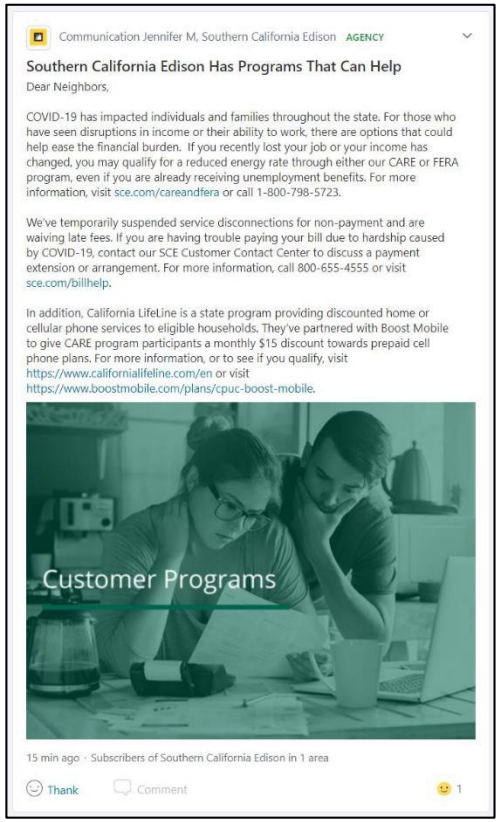
Updated sce.com landing page for COVID-19



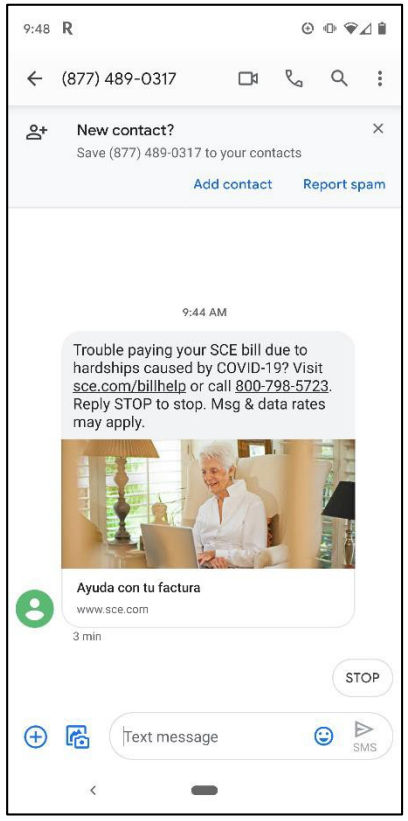
Updated e-mail for COVID-19

COVID-19 Impacts: Outreach Strategies

Increased awareness and enrollment in SCE's Income Qualified Programs



NextDoor App Post for COVID-19 reached 1 million SCE customers

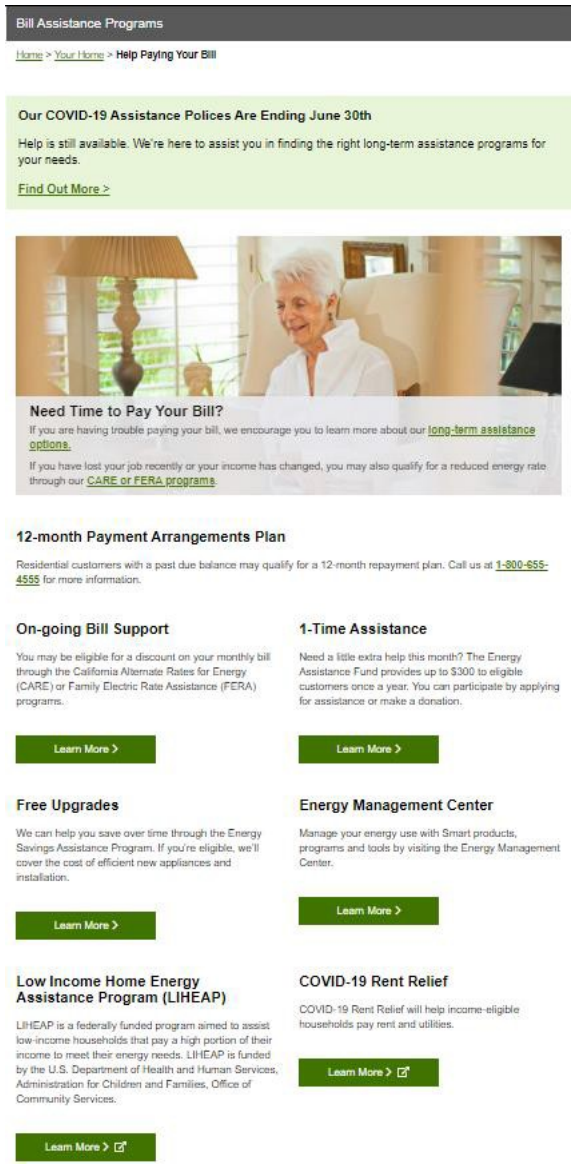


Text Message for COVID-19 delivered to 1.6 million SCE customers

Additional Assistance Programs

Additional Assistance Programs Featured on sce.com/billhelp:

- Low Income Home Energy Assistance (LIHEAP)
- Emergency Renters Assistance Program



Additional Assistance Programs

Increased awareness for the LIHEAP (Low Income Home Energy Assistance Program) utility assistance program.

- New posts on Facebook and Twitter resulted in more than 7,000 impressions
- Direct customers directly to CSD website for more information

Additional Assistance Programs

Partnering with www.auntbertha.com (now www.findhelp.org), an aggregate Web site offering assistance to customers based on their ZIP code input.

- SCE's income-qualified programs are featured on their site and provide links to SCE programs for customers to learn about and enroll in CARE, FERA, ESA and EAF.

In conversations with Inland Empire Health Plan (IEHP) and Molina Healthcare to encourage Riverside and San Bernardino county residents to enroll in eligible health insurance programs.

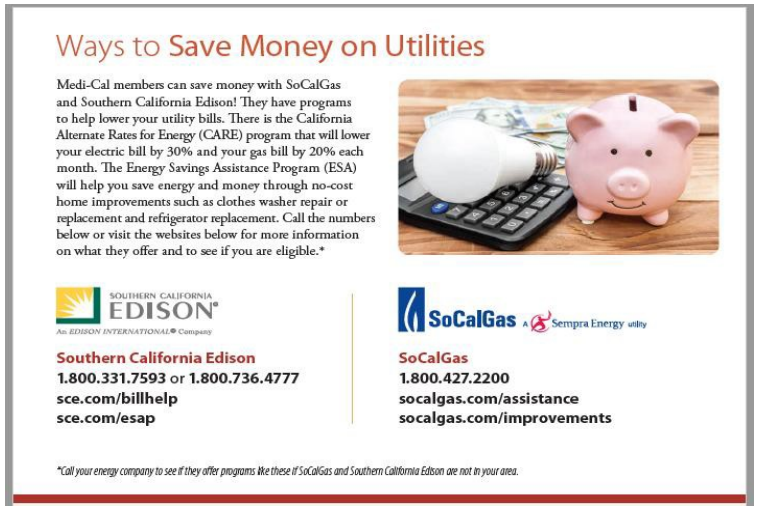
- Working with SCE Community Based Organizations (CBOs) to partner together for cross-promotion efforts.

Ongoing partnership with SoCalGas and LA Care, one of the largest Medi-Cal provider in Los Angeles county to cross-promote the CARE and ESA programs

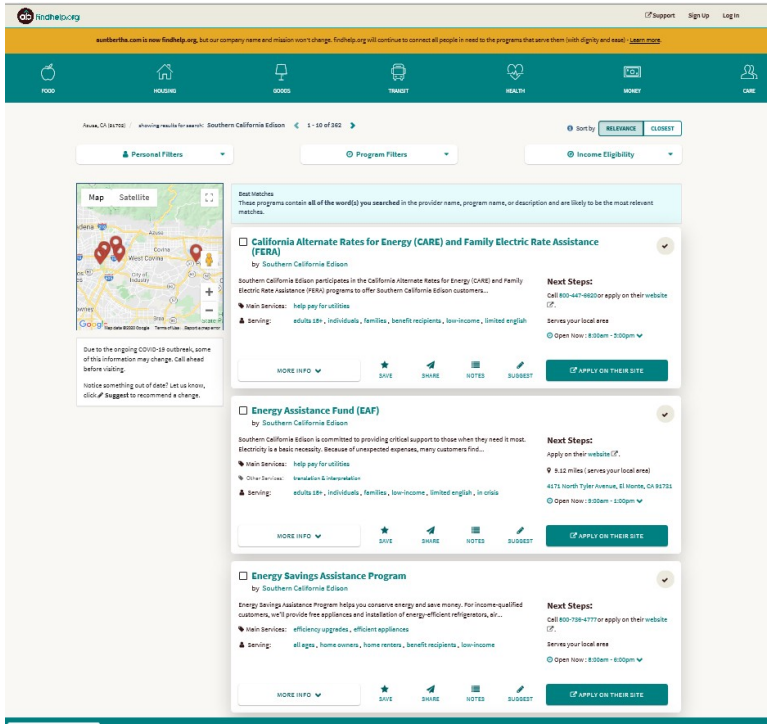
- Medi-Cal is an automatically eligible Public Assistance program.
- SCE and So Cal Gas planned to participate in LA Care's eight (8) Community Resource Center activities.
- Due to the extended COVID-19 pandemic restrictions, events will be rescheduled as appropriate in 2021.

Additional Assistance Programs

Increased awareness for SCE's Income Qualified Programs



LA Care *Be Well* newsletter information on SCE and SoCalGas assistance programs



SCE programs on www.findhelp.org

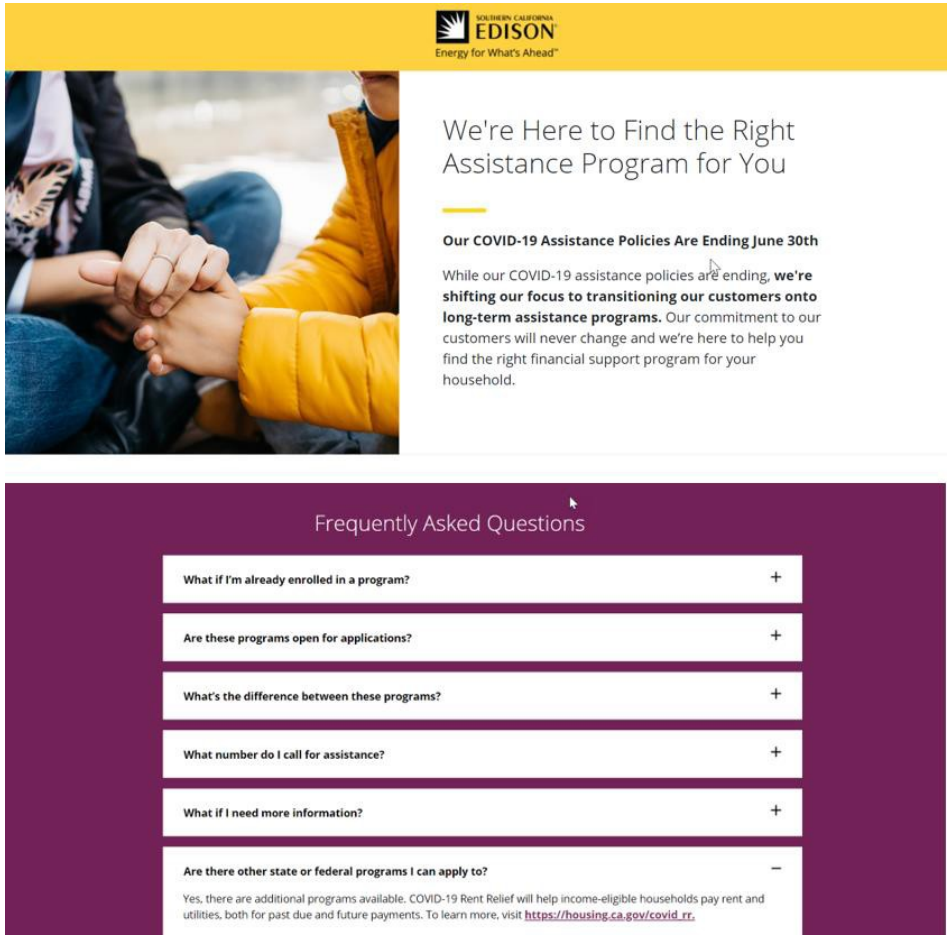
Emergency Customer Protections

- On April 29, SCE began communications regarding the end of Emergency Customer Protections
- 271,367 Emails Correspondences Sent
- 196,082 Direct Mail Letters Sent

Emergency Customer Protections

- New web page: sce.com/findsupport

- Provides information for:
  - CARE
  - FERA
  - ESA
  - Medical Baseline
  - Arrearage Management Plan
  - LIHEAP
  - Energy Assistance Fund
  - Emergency Renters Assistance Program



COVID-19 Impacts: ESA Program Performance

Program Summary for the Month (As of April 30, 2021)			
2021	**Authorized/Planning Assumptions**	**Year-to-date Actual**	**%**
Budget	$40,926,751	$23,569,768	58%
Homes Treated	43,562	27,429	63%
kWh Saved	0	13,451,830	N/A
Therms Saved	N/A	N/A	N/A

COVID-19 Impacts: ESA Program

ESA Workforce

- ESA Program enrollment activity is improving. All contractors have resumed program services.
- The PPRS Credit Earning period began December 1, 2020 and will end May 31, 2021.
  - 22 contractors are eligible to earn PPRS credits.
  - Contractors are continuing to apply PPRS Credits and make repayments according to repayment schedules

Virtual ESA

- Virtual enrollments with option for Self-certification allowed for income verification continues to be offered.
  - Enrollment measures either mailed or provided through contactless delivery.
  - A few contractors are still doing 100% virtual enrollments.
- From January to April 2021, contractors have enrolled over 5,000 customers through the virtual method.

Outreach

- Face-to-face outreach activities have resumed at each ESA contractor's discretion.
- Continuing partnership with SignIFICANT to reach out to deaf and hard of hearing community.
  - Outreach is done through multiple social media platforms and video calls.
  - In April, SignIFICANT hosted a Webinar to educate customers on Energy Efficiency and the ESA program.

Critical Care Backup Battery Program

CRITICAL CARE BACKUP BATTERY PROGRAM	ELIGIBILITY REQUIREMENTS	BATTERY OFFERING
The Critical Care Backup Battery (CCBB) Program was developed to help address the impacts of a PSPS de-energization event for our most vulnerable customers. The CCBB Program provides a free portable backup battery to eligible customers who rely on medical devices to sustain life.	Eligible customers must be enrolled in SCE's Medical Baseline program, enrolled in SCE's CARE or FERA program, and live in a high fire risk area.	The program offers 3 different sizes of backup batteries. Each battery will be equipped with a 200W solar panel. Customers will be assessed to determine the best size battery for their needs.

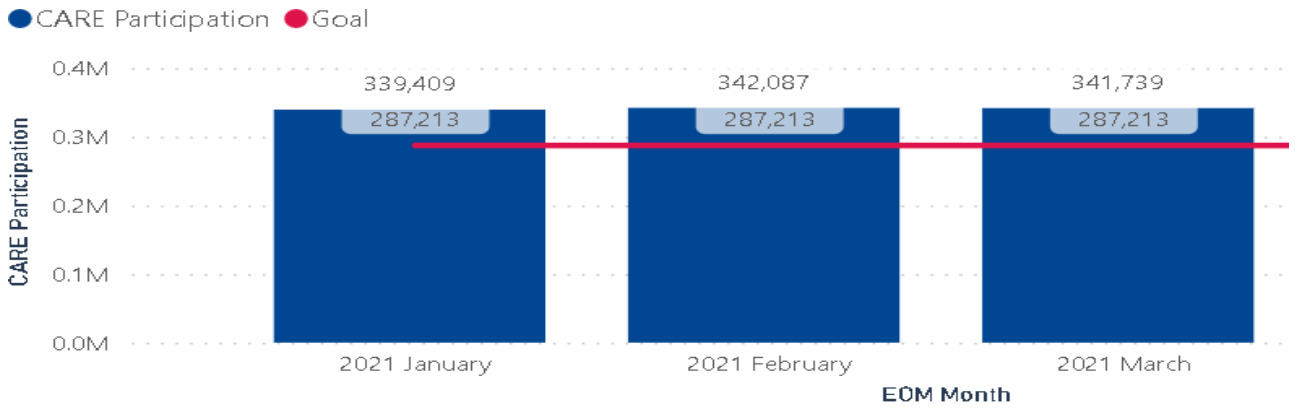
Program Summary through April 2021	
2021 Enrollments	**2,198**
2021 Batteries Deployed	**1,803**
2020 - YTD Program Enrollments	2,980
2020 - YTD Batteries Deployed	2,524

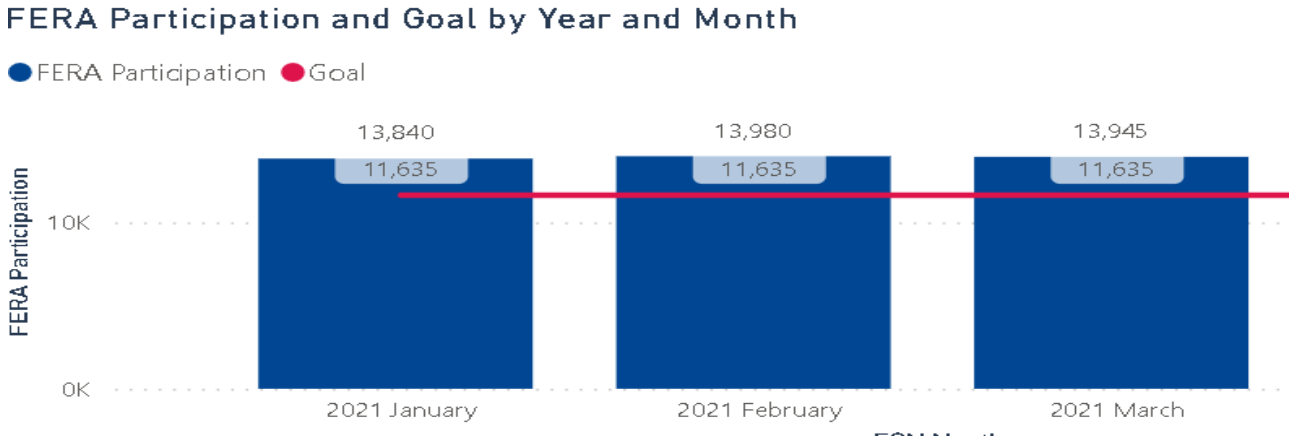
SDG&E's Response to COVID-19

CARE, ESA, PSPS

COVID-19 Impacts: CARE & FERA Programs

- Enrollments have stabilized; estimated eligible population has decreased by 3.2% (CARE) and 2.1% (FERA) for 2021.
- 117% penetration for CARE and 35% penetration for FERA.
- In the first quarter, 75% of applications were submitted over the internet.





SDG&E continues to recognize that the COVID-19 pandemic is an evolving crisis and continues to monitor the situation and perceived customer impacts. While CARE/FERA enrollments have increased during the pandemic period, SDG&E cannot conclusively state that the increased enrollments are a direct result of the pandemic.

COVID-19 Impacts:
ESA Program Performance

Program Summary through April 2021			
Description	**Authorized/Planning Assumptions**	**Year-to-date Actual[1]**	**%**
Budget	$16,460,022	$5,084,101	31%
Homes Treated	5,973	3,440	58%
kWh Saved	N/A	384,675	N/A
Therms Saved	N/A	4,497	N/A

[1] 2021 through April 30, 2021, as reported in SDG&E's ESA-CARE Monthly Report (filed May 21, 2021)

COVID-19 Impacts:
ESA Program Workforce & Outreach

ESA Workforce

- ESA Program enrollment continues to improve.
- All contractors have resumed ESA Program services.
- The PPRS Credit Earning period began December 1, 2020 and ended May 31, 2021.
- Contractor Advance tracking.
  - Five contractors were eligible to earn PPRS credits.
  - Four contractors have earned the full amount eligible for the PPRS credit.

Virtual ESA

- Contractors continue conducting follow-up in-home assessments and measure installation for customers enrolled through ESA's virtual enrollment campaigns. Less than 2% of customer are enrolled through virtual enrollment efforts.

Outreach

- Marketing and outreach efforts include direct mail, email campaigns, and community engagement with community partners.
- Door-to-door canvassing activity has fully resumed and enrollments through this effort continue to improve.

PSPS Customer Support

SDG&E partners with community organizations to offer support to customers, especially those who may be vulnerable, during PSPS events

Available Services

- Readiness Support
- Amplified Notifications
- Accessible Transportation
- Hotel Stays
- Food Delivery
- Resiliency Items
- Battery Back-up Programs
- Welfare Checks

PSPS Update: Resiliency Programs

SDG&E offers several battery back-up programs to enhance resiliency during PSPS events, including no-cost and low-cost options

Generator Grant Program 2021

- Provided at no cost to the customer
- Eligible customers receive a Goal Zero Yeti 3000 portable power station and Boulder 100 Briefcase solar module which produces power to recharge the unit. Extension cord and car charger included as well
- Targeted to vulnerable customers impacted by PSPS events
- In 2021, over 3,700 qualifying customers will be invited to participate.

Generator Assistance Program 2021

- Rebate of $300 for portable gas generators ($450 for CARE customers) through local and online retailer
- All customers in High Fire Threat District (HFTD) who have experienced a 2019 or 2020 PSPS outage are eligible
- In 2021, over 55,000 qualifying customers will be invited to participate

SoCalGas

COVID-19 IMPACTS

Consumer Protections

CARE

ESA

COVID-19 IMPACTS: Consumer Protections

SoCalGas' COVID-19 Pandemic Protections provides the following to residential and small business customers until June 30, 2021:

- Waives deposit requirements
- Implements payment plan options
- Suspends disconnection for non-payment
- Waives late fees for small businesses
- Suspends all collections activity, including field service collections
- Suspends recertification and verification requests for the CARE program
- Suspends all CARE removals
- Suspends recertification requests for Medical Baseline customers
- Contacts all community outreach contractors to help them better inform customers of these eligibility changes
- Doubles Gas Assistance Fund eligibility to $200

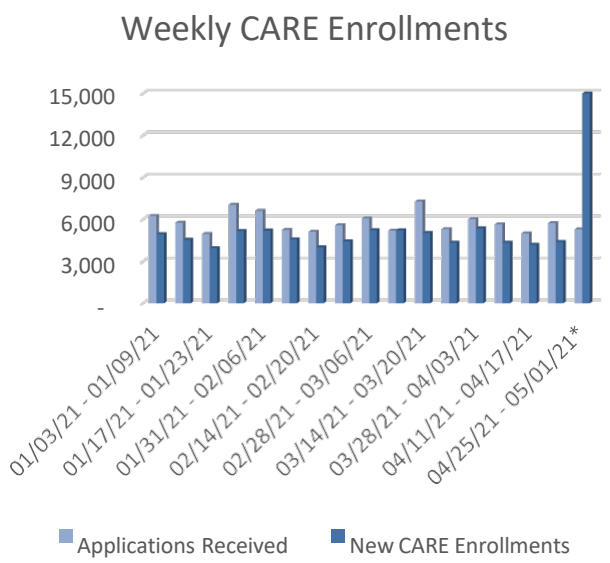
*On February 11, 2021, the Commission issued Resolution M-4849 to extend the Emergency Customer Protections from Resolution M-4842 through June 30, 2021.

COVID-19 IMPACTS: SoCalGas' CARE Program

Enrollment trends – weekly CARE enrollment tracking January - April 2021

Total New Enrollments: 87,353*

Week	Applications Received	% Change From Week Prior	New CARE Enrollments	% Change From Week Prior2
01/03/21 - 01/09/21	6,238	14.6%	4,945	19.4%
01/10/21 - 01/16/21	5,760	-7.7%	4,545	-8.1%
01/17/21 - 01/23/21	4,954	-14.0%	3,935	-13.4%
01/24/21 - 01/30/21	7,033	42.0%	5,168	31.3%
Total CARE Participants January 2021			1,777,521	
01/31/21 - 02/06/21	6,606	-6.1%	5,206	0.7%
02/07/21 - 02/13/21	5,243	-20.6%	4,572	-12.2%
02/14/21 - 02/20/21	5,106	-2.6%	4,000	-12.5%
02/21/21 - 02/27/21	5,578	9.2%	4,428	10.7%
Total CARE Participants February 2021			1,787,290	
02/28/21 - 03/06/21	6,064	8.7%	5,223	18.0%
03/07/21 - 03/13/21	5,192	-14.4%	5,215	-0.2%
03/14/21 - 03/20/21	7,281	40.2%	5,032	-3.5%
03/21/21 - 03/27/21	5,300	-27.2%	4,333	-13.9%
03/28/21 - 04/03/21	6,013	13.5%	5,362	23.7%
Total CARE Participants March 2021			1,796,671	
04/04/21 - 04/10/21	5,643	-6.2%	4,328	-19.3%
04/11/21 - 04/17/21	4,995	-11.5%	4,188	-3.2%
04/18/21 - 04/24/21	5,729	14.7%	4,385	4.7%
04/25/21 - 05/01/21*	5,287	-7.7%	15,526	254.1%
Total CARE Participants April 2021			1,808,053	



*Based on Total New enrollments in April 2021 CARE Table 2.
**Increase due to first-time PG&E data share

COVID-19 IMPACTS: SoCalGas' CARE Program

Future Marketing & Outreach Strategy (1 year - 2 year)
• To reach newly eligible customers, SoCalGas' Marketing & Outreach strategy will continue to integrate mass advertising campaigns, direct marketing, emails, bill inserts, texting, and outreach to community organizations.
• Digital and virtual channels will be prioritized for ease of enrolling on-line.
• Focusing on counties with lower penetration rates: ○ San Luis Obispo: Continued partnership with Community Based Organizations (CBO) in this rural county. Center for Family Strengthening – Promotores Collaborative of San Luis Obispo County to continue grassroots outreach with community. ○ Orange County: Increased partnerships community organizations working with AAPI community, Veterans, and families with children with disabilities. New Community Partners include: Veterans Legal Institute, OC Autism Foundation and The Vietnamese Community of Southern California (VietSoCal), along with continuing partnerships with Second Harvest Foodbank, Goodwill of Orange County, Families Forwards and Walking Shield) to help distribute Customer Assistance Program information.
• To address and reduce attrition once emergency protections are lifted, SoCalGas will increase messaging to customers in 2021, to let them know about recertification and income verification that will be reinstated after June 30, 2021.

COVID-19 IMPACTS: SoCalGas' CARE Program

Coordination with Social Services for Customer Assistance Program Outreach

- SoCalGas continues to work with government agencies in their service territory to promote CARE program information during the enrollment of customers onto social service programs.
- Trainings on CARE and other programs such as Arrearage Management Program and the Emergency Rental Assistance Program were conducted with the 5 new community-based organizations on-boarded for 2021.

ESA Program Performance

Program Summary through April 2021			
2021	Authorized / Planning Assumptions*	Year-to-Date Actual	%
Budget	$67,066,667	$27,883,032	41.58%
Homes Treated	60,000	34,642	58%
Therms Saved**	N/A	231,686	N/A

* Annual budget and homes treated goals through April 30, 2021 as reported in the IOU ESA-CARE Monthly Report (filed May 21, 2021).

** Not Applicable since savings targets were not proposed in the IOUs bridge funding ALs.

COVID-19 IMPACTS: SoCalGas' ESA Program

Workforce

- Resolution E-5074 requires the following:
  - Up to 60 days advance payments to ESA contractors.
    SoCalGas paid out over $14M through July, 2020 to support the workforce.
  - Provides a Post-Pandemic Return to Service (PPRS) credit which will be earned through actual work performed in ESA Program eligible households for a six-month period.
  - Advance payments must be repaid no later than December 31, 2021.
  - As of April 30, 2021 the total advances outstanding is $3,568,930, as shown on Table 8 of the monthly report.

COVID-19 IMPACTS: SoCalGas' ESA Program

Future Marketing & Outreach strategy (1 year - 2 year)
• To reach newly eligible customers, SoCalGas' Marketing & Outreach strategy will continue to integrate advertising campaigns, direct marketing, and outreach to community organizations.
• Digital and virtual channels will be prioritized for ease of reaching customers about the ESA Program.
• SoCalGas will continue to support the Clear Plan as well as the virtual enrollment process that was launched on May 12, 2020. The virtual enrollment process allows contractors to enroll customers over the phone with eligibility documentation being transmitted through secure means.

COVID-19 IMPACTS: SoCalGas' ESA Program

Timeline and Milestones
• The suspension of in-person program activities in response to COVID-19 and related state and local orders began on March 18, 2020 and ended May 31, 2020. SoCalGas resumed program services on June 1, 2020.
• In alignment with SoCalGas company directives and state and local Stay-at-Home orders, SoCalGas developed and implemented on May 12, 2020 a process to virtually enroll customers into the ESA Program. This process has allowed the program to maintain continuity for eligible customers while supporting the contractor workforce by building a pipeline of enrolled customers.
• Resolution E-5074 was approved on May 28, 2020, requiring 60-day advance payment offers to ESA contractors to cover the period of suspended activity, and establishing a Post-Pandemic Return to Service (PPRS) credit and earning period.
• SoCalGas began the six-month PPRS credit-earning period on July 15, 2020. The PPRS earnings period has completed as of January 15, 2021.
• All Prime Contractors who accepted an advance payment must zero out their balances no later than December 31, 2021.

COVID-19 IMPACTS: SoCalGas' ESA Program

Weatherization programs overall performance/penetration rates

- Since the suspension was lifted, ESA Program contractors have been ramping up their program activity. Below are homes treated by month, as reported in SoCalGas' Monthly Reports.

    - January: 0
    - February: 6,510
    - March: 14,437
    - April: 13,695

Break

Item 10: Technical Advisory Committee

2:30 – 2:40 PM

Board Chair Delgado-Olson& Board Member Wimbley

California Public
Utilities Commission

Item 11: Subcommittee Reports

2:40 – 3:00 PM

Subcommittee Reports

- Low Income Energy Assistance Programs (LIEAP)
  - *Castaneda, Stamas, Watts, Wimbley, Rendler, Medina, Irwin, Castilone*
- Legislative
  - *Stamas, Watts, Castaneda, Liman*
- Low Income Needs Assessment (LINA)
  - *Delgado-Olson, Stamas, Castaneda, Medina*
- Water & Climate Change
  - *Liman, Delgado-Olson, Castaneda, Medina, Irwin*

Item 12: Coordination Report on Low Income Weatherization Program (LIWP)
Jason Wimbley, CSD

3:00 – 3:05 PM

California Public Utilities Commission

Item 13: Disadvantaged Communities Advisory Group (DACAG) Update

3:05 – 3:10 PM

California Public Utilities Commission

Item 14: Wrap Up & Closing Remarks

3:10 – 3:20 PM

Thank you!

Save-the-date:
3rd Quarter Meeting Date
–
September 27, 2021

Meeting materials at www.liob.org