



Joint IOU Report of the CARE and ESA Programs

Low Income Oversight Board Meeting
WebEx
September 29, 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	\$14,150,600	\$7,370,049	52%	\$513,749,673
SCE	\$9,257,045	\$3,144,879	34%	\$403,920,566
SDG&E	\$6,622,169	\$2,531,198	38%	\$93,519,598
SoCalGas	\$9,859,663	\$3,725,292	38%	\$110,295,559
Total	\$39,889,477	\$16,771,418		\$1,121,485,396

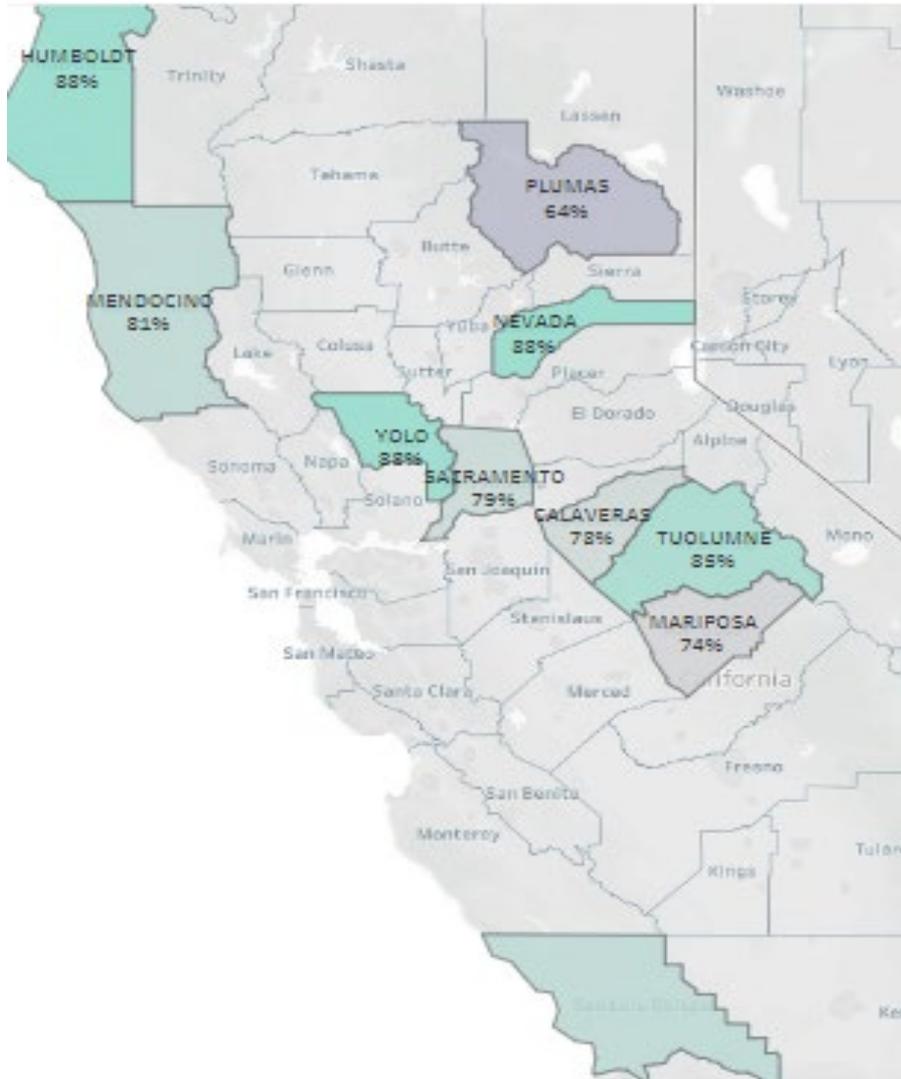
2021 YTD Enrollment and Penetration						
Utility	Total Residential Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled	Penetration Rate	Newly Enrolled Customers
PG&E	5,583,279	1,447,571	26%	1,609,223	111%	139,161
SCE	4,497,048	1,349,716	30%	1,482,236	110%	133,871
SDG&E	1,372,319	293,584	21%	342,851	117%	35,253
SoCalGas**	5,672,733	1,712,462	30%	1,839,181	107%	157,818
Total	17,125,379	4,803,333		5,273,491		466,103

* Authorized budgets pursuant to Decision 21-06-015. 2021 YTD through July 31, 2021, as reported in the IOU ESA-CARE Monthly Report (filed August 23, 2021).

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

CARE Program *CARE Penetration map*

PG&E



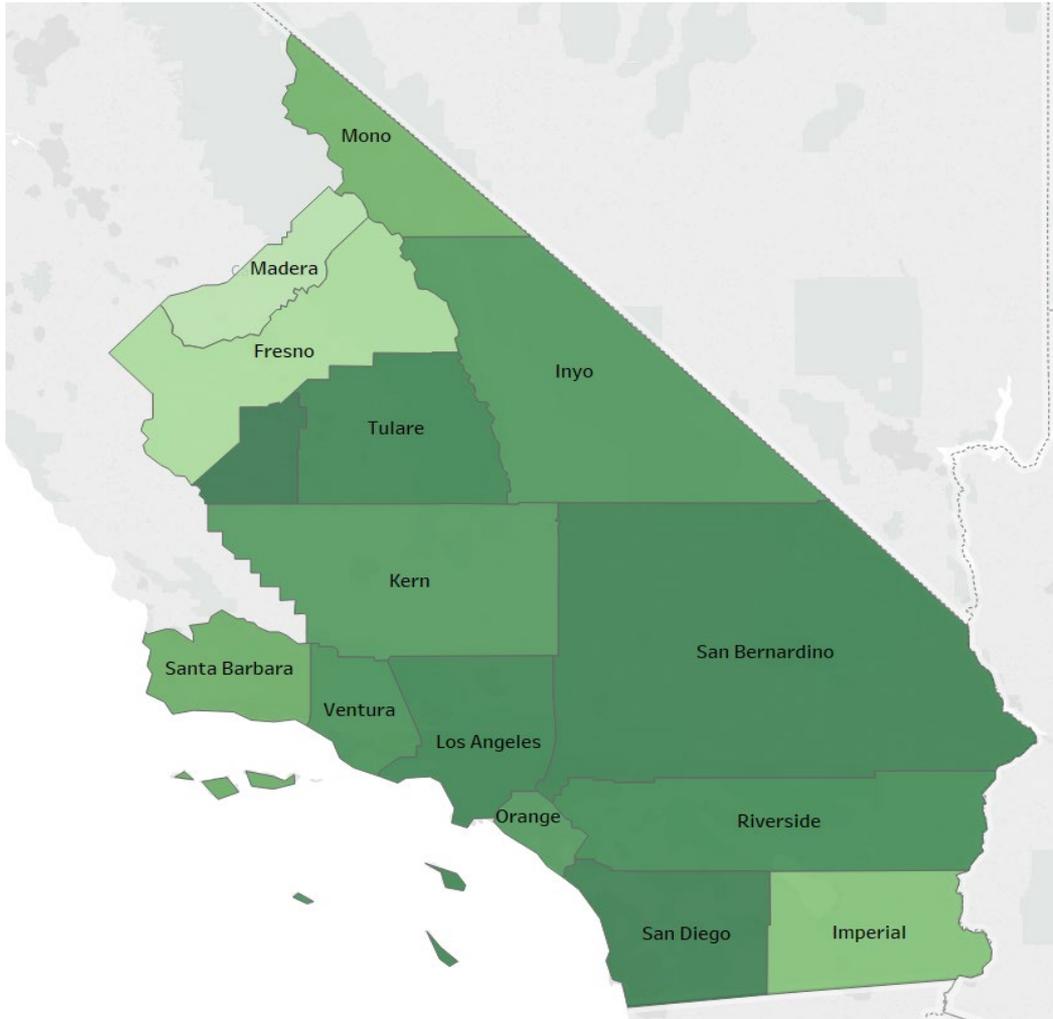
PG&E Counties With Lowest Penetration Rates	
County	Penetration Rate*
PLUMAS	64%
MARIPOSA	74%
CALAVERAS	78%
SACRAMENTO	79%
SAN LUIS OBISPO	81%
MENDOCINO	81%
TUOLUMNE	85%
NEVADA	88%
HUMBOLDT	88%
YOLO	88%

*Represents PG&E counties with the lowest penetration rates, as of August 31, 2021.

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

CARE Program *CARE Penetration map*

SCE



County	Penetration Rate*
Riverside	147%
San Bernardino	141%
Kings	113%
Los Angeles	104%
San Diego**	100%
Tulare	99%
Ventura	98%
Orange	90%
Inyo	76%
Kern	72%
Santa Barbara	64%
Mono	46%
Imperial**	45%
Fresno**	11%
Madera**	0%

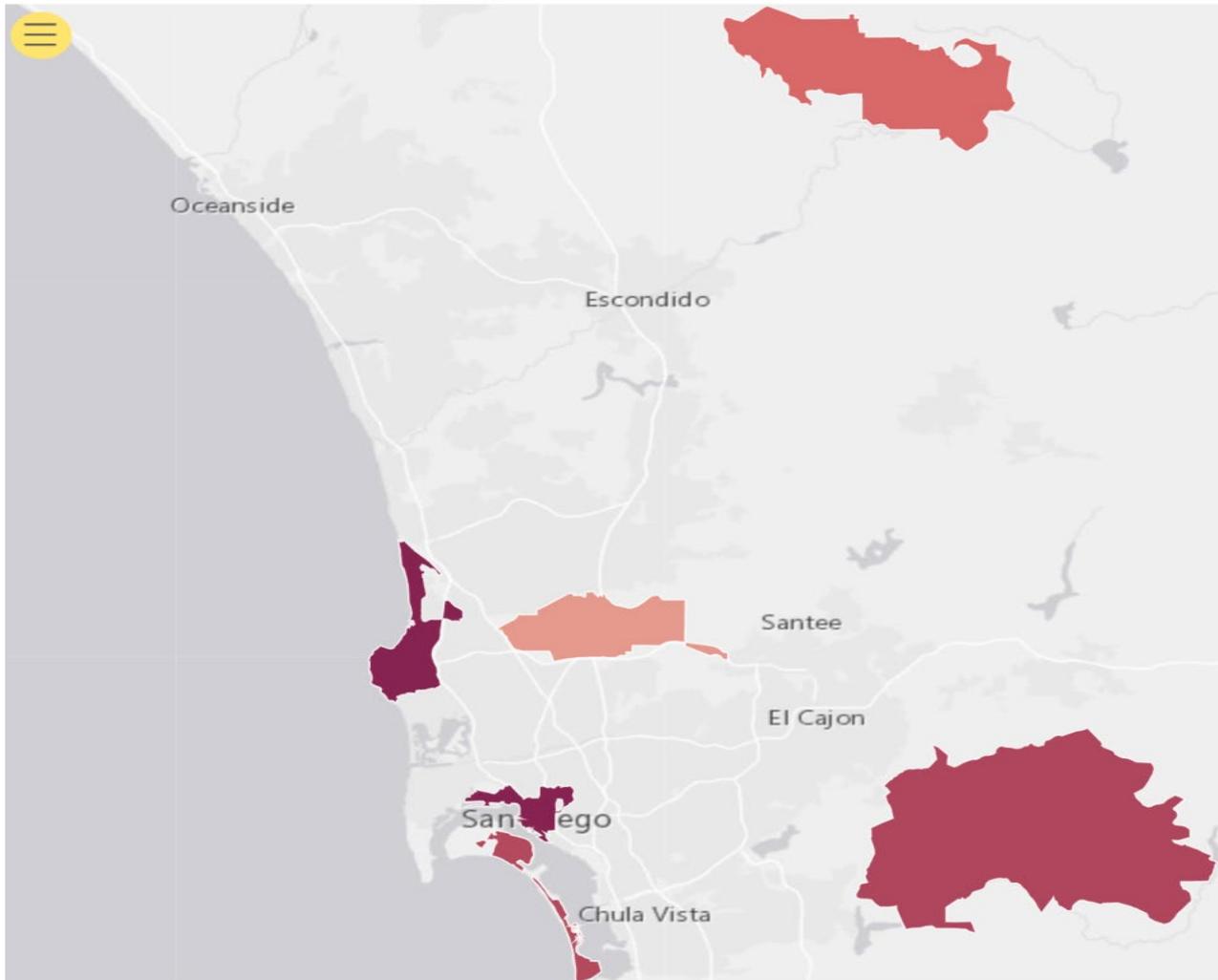
*Represents the penetration rates for all SCE counties effective August 31, 2021.

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

CARE Program *CARE Penetration map*



SDG&E



Zip codes with lowest penetration (overall)

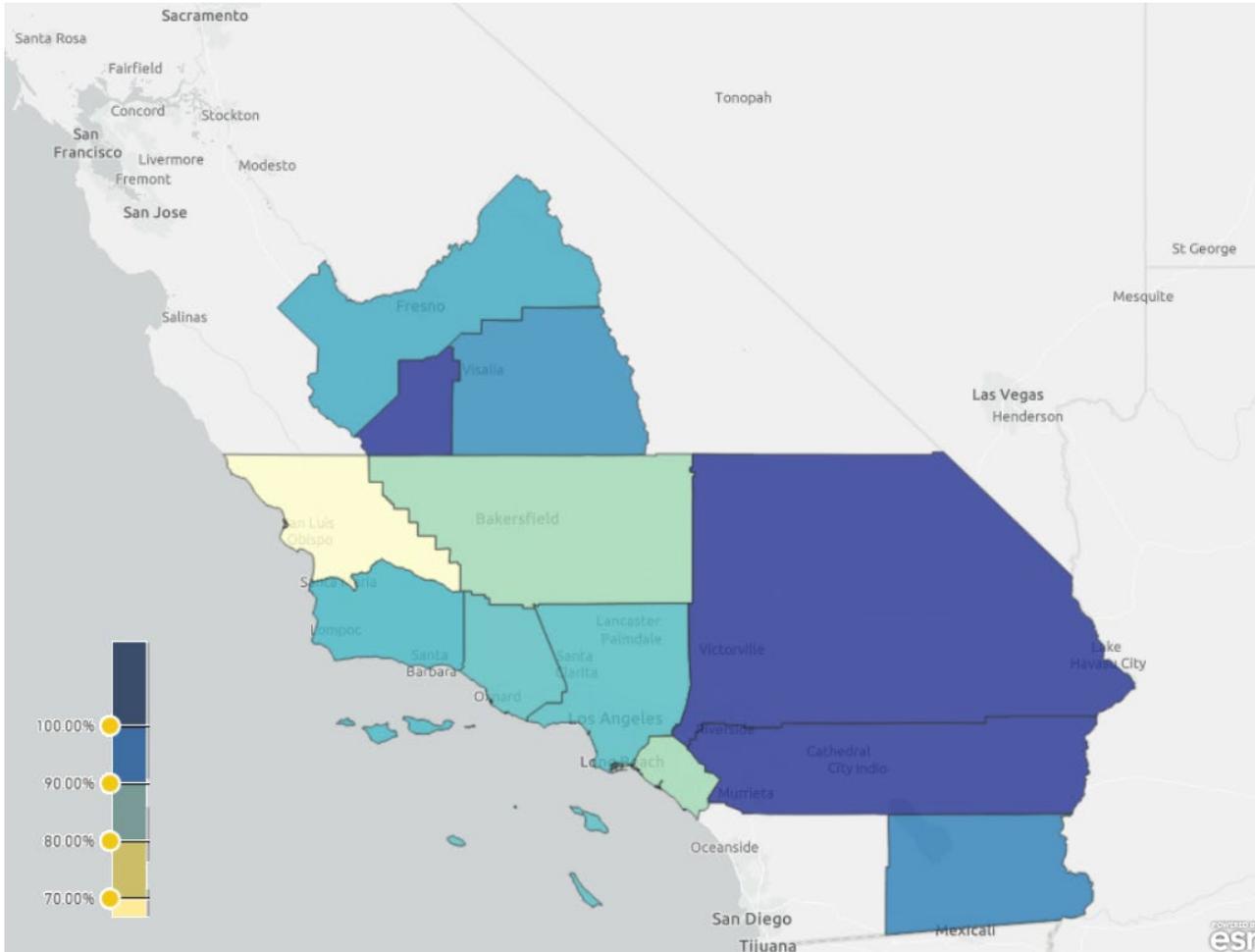
City	Penetration Rate
Miramar	19%
Coronado	36%
La Jolla	45%
Jamul	61%
Pauma Valley	62%
Downtown/ Metro Area	71%

*Represents SDG&E zip codes with the lowest penetration rates, August 31, 2021.

CARE Program *CARE Penetration map*



SoCalGas



County	Penetration Rate *
San Bernardino	159%
Riverside	140%
Kings	118%
Fresno	115%
Tulare	107%
Santa Barbara	106%
Imperial	106%
Los Angeles	101%
Ventura	99%
Kern	97%
Orange	90%
San Luis Obispo	79%

*Represents the penetration rates for all SoCalGas counties effective August 31, 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 Bridge Period ESA Program Budget Updates *

January – June 2021 Authorized Program Budgets and Expenditures			
Utility	Authorized Budget ¹	YTD Expenditures ²	%
PG&E	\$127,394,116	\$94,126,346	74%
SCE	\$40,926,751	\$37,817,570	92%
SDG&E	\$16,460,022	\$7,828,333	48%
SoCalGas	\$67,066,667	\$55,986,777	83%
Total	\$251,847,557	\$187,930,693	75%

* 2021 Bridge Period through June 30, 2021, as reported in the IOU ESA-CARE Monthly Report (filed July 21, 2021).

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.



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2021 ESA Program Budget Updates (beginning 7/1/21) *

July – December 2021 Authorized Program Budgets and Expenditures			
Utility	Authorized Budget ¹	YTD Expenditures ²	%
PG&E	\$113,791,260	\$15,130,490	13%
SCE	\$40,926,751	\$8,076,835	20%
SDG&E	\$11,768,190	\$1,329,366	11%
SoCalGas	\$67,066,667	\$1,940,335	29%
Total	\$233,552,868	\$25,147,660	11%

¹ Authorized budgets pursuant to Decision 21-06-015.

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

* 2021 budget for 2021-2026 Program Cycle beginning July 1, 2021 per D. 21-06-015, as reported in the IOU ESA-CARE Monthly Report (filed August 23, 2021).



Energy Savings Assistance Program

2021 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	4,601,774	5,379	50,402,688	2,612,786	9.1%	0.2%	N/A	N/A
SCE	4,439,850	N/A	62,957,592	N/A	7.1%	N/A	N/A	N/A
SDG&E	181,475	463	10,671,912	562,853	1.7%	0.1%	N/A	N/A
SoCalGas	N/A	9,836	N/A	3,315,519	N/A	0.3%	N/A	N/A
TOTAL	9,223,099	15,678	124,032,192	6,491,158			N/A	N/A

¹ Beginning July 1, 2021 for Program Cycle 2021-2026, as reported in the IOU ESA-CARE Monthly Report (filed August 23, 2021).

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

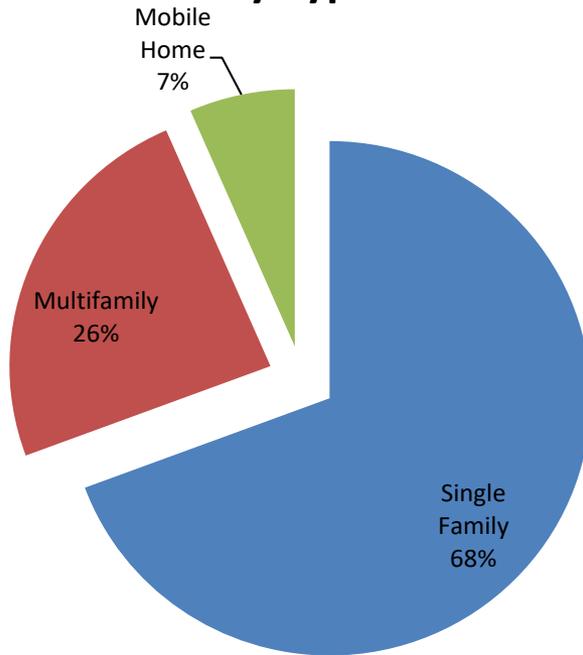
³ Not Applicable since savings targets were not proposed in the IOUs bridge funding ALs.



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ESA 2020 SW Participation By Type



2021 Bridge Period Households Treated

January – June 2021 Bridge Period 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	16,000	37,627	53,627	107%	3.36%
SCE	43,562	25,895	17,651	43,546	100%	3.20%
SDG&E	5,973	2,244	3,113	5,357	90%	1.82%
SoCalGas	60,000	29,628	29,603	59,231	99%	3.05%
Total	159,535	73,767	87,994	161,761		

¹ 2021 through June 30, 2021, as reported in the IOU ESA-CARE Monthly Report (filed July 21, 2021).

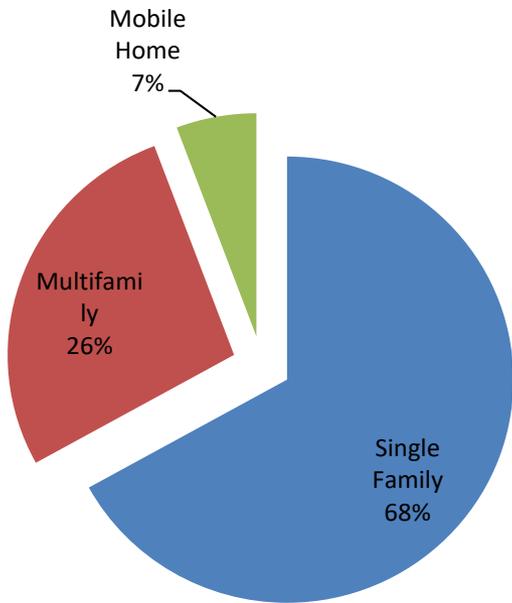
² Athens estimate of IOU residential customers estimated eligible for ESA at 200% of FPL; updated annually in February.



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ESA 2020 SW Participation By Type



2021 Households Treated (beginning 7/1/21)

2021 Households Treated ¹				
Utility	Goal	Total	Total as % of 2021 Goal	Total as % of Eligible ESA HH ²
PG&E	50,000	7,721	15%	0.48%
SCE	43,562	9,662	22%	0.71%
SDG&E	5,973	2,322	39%	.79%
SoCalGas	60,000	9,836	16%	0.51%
Total	159,535	29,541		

¹ Beginning July 1, 2021, for Program Cycle 2021-2026 as reported in the IOU ESA-CARE Monthly Report (filed August 23, 2021).

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



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 July 2021, PG&E's SPOC has referred 123 multifamily customers to 31 program offerings YTD.
- **SCE:** SCE is continuing to work with Service Providers on monthly targeted mailer campaigns, contacting potential MF CAM properties that received the mailer to follow up. SCE's Service Providers are also utilizing SOMAH leads with a multipronged approach consisting of two phone contact attempts followed by sending the MF CAM brochure and information packet.
- **SDG&E:** In 2021, SDG&E's SPOC conducted 22 referrals across its ESA & ESA CAM programs.
- **SoCalGas:** Through August 31, 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:** As of July 2021, PG&E has successfully completed 59 ESA CAM projects and treated 446 buildings and 4,805 units YTD. Additionally, the program has enrolled 174 and audit 173 buildings for 2022.
- **SCE:** As of July 2021: Deed Restricted: In progress – 24 Whole Building, 19 Common Area, 6 In-Unit. Deed Restricted: Completed – 12 Whole Building, 5 Common Area, 12 in-unit. Market Rate: In progress – 17 in-unit. Market Rate: Completed – 31 in-unit.
- **SDG&E:** July 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. We have successfully treated 17 properties, benefiting 115 buildings and 1,334 units in 2021.
- **SoCalGas:** As of August 31, 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



As of July 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, Hoopa Valley Tribe, Hopland Reservation - Lone Band of Miwok Indians, Karuk Tribe, Manchester Point Arenas Rancheria, Mooretown Rancheria, North Fork Rancheria, Redwood Valley Rancheria, Round Valley Reservation, Sherwood Valley Rancheria, Tuolumne Rancheria, United Auburn Indian Community, Upper Lake Rancheria, Wiyot Tribe (Table Bluff), Yurok Tribe
Tribes requested outreach materials or applications	18	Bear River Band of Rohnerville Rancheria, Berry Creek Rancheria, Big Valley Rancheria, Cloverdale Rancheria, Cold Springs Rancheria of Mono Indians, Coyote Valley Band of Pomo Indians, Greenville Rancheria, Grindstone Rancheria, Iona Band of Miwok Indians Laytonville Rancheria (Cahto), Manchester Point Arenas Rancheria, Mechoopda Indian Tribe, North Fork Rancheria, Pinoleville Reservation, Robinson Rancheria of Pomo Indians, Sherwood Valley Rancheria, Wiyot Tribe (Table Bluff), Yurok Tribe
Tribes who have not accepted offer to Meet and Confer	28	Big Lagoon Rancheria, Big Valley 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, Federated Indians of Graton Rancheria, Greenville Rancheria, Grindstone Rancheria, Jackson Rancheria, Middletown Rancheria, Paskenta Rancheria, Picayune Rancheria, Pinoleville Reservation, Pit River Tribes, Redding Rancheria, Robinson Rancheria of Pomo Indians, 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, 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	18	Complete in 2019: Yurok Tribe Complete in 2020: None due to COVID-19 Contact in 2021: Karuk Tribe Round Valley Reservation Wiyot Tribe (Table Bluff) In Process for 2021: Bear River Band of Rohnerville Rancheria, Big Sandy Rancheria Housing Authority, Cloverdale Rancheria, Hoopa Valley Tribe, Karuk Tribe Northern Circle Housing Authority, Berry Creek Rancheria, Guidiville Rancheria, Hopland Reservation, Manchester-Pt. Arenas Rancheria, Mooretown Rancheria, Redwood Valley Rancheria, Sherwood Valley Rancheria, Picayune Rancheria, Round Valley Reservation
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, Lone 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	16	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, Picayune Rancheria 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, 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, the outreach plan included outreach to 14 Tribe Housing Authority Offices and 8 Tribal Temporary Assistance for Needy 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 in-person and webinar meetings with five 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.
- PG&E started the process for 18 Tribes and Housing Authority sites involved in Focused Project/ESA Partnership offer on Tribal Lands. The process for this project included providing information to eight tribes that requested ESA contractor information. For these tribes, we provided two options: (1) either to send us a list of residents who were interested in setting up appointments with ESA contractors or (2) to provide residents with information on how to sign up for an appointment with an ESA contractor. Furthermore, PG&E started the process of getting the tenant and housing information needed from the Bear River Band of Rohnerville and the Northern Circle tribes in order to start assigning ESA contractors.
- In addition to the offer to meet and confer, a newsletter was sent to all 51 tribal communities, Tribe Housing Authority Offices and TANF agencies 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.

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
- SCE’s Local Public Affairs is being leveraged to develop a revised outreach strategy aimed at engaging the remaining tribes. Additional collateral is being developed that will be used during future outreach activities and provide an overview of the ESA program and the many benefits it can provide to the tribal Communities.

#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	4	2	1	5
	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 SDG&E Serves	Outreach Efforts	Tribes Outreached for ESA Program	
17 Tribes			
<ul style="list-style-type: none"> • Barona Band of Mission Indians • Campo Kumeyaay Nation • Ewiiapaayp Band of Kumeyaay Indians (Cuyapaibe Reservation) • Inaja & Cosmit Band of Indians • Jamul Indian Village • 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 Luiseno Indians • Rincon Band of Luiseno Indians 	<ul style="list-style-type: none"> • San Pasqual Band of Mission Indians • Iipay Nation of Santa Ysabel (Santa Ysabel Reservation) • Sycuan Band of Kumeyaay Nation • Viejas Band of Kumeyaay Indians 	<ul style="list-style-type: none"> • Ongoing outreach conducted through SCAIR and SCTCA CBOs • In Q2 2021, SDG&E kicked off direct outreach to all 17 tribes served for a “whole neighborhood” offer • To date, presentations have been provided to 7 tribes to discuss assistance program offerings and determine eligibility • Of these 7 tribes, 0 have indicated they are eligible to participate in SDG&E's low-income programs • SDG&E is continuing outreach efforts to the remaining tribes to coordinate a presentation and discuss potential program offerings 	<ul style="list-style-type: none"> • Barona Band of Mission Indians • Jamul Indian Village • Pauma Band of Luiseno Indians • Rincon Band of Luiseno Indians • Ewiiapaayp Band of Kumeyaay Indians (Cuyapaibe Reservation) • Viejas Band of Kumeyaay Indians • Sycuan Band of Kumeyaay Nation

Energy Savings Assistance Program

SoCalGas Tribal Outreach for Low Income Programs



Federally Recognized Tribes in SoCalGas' Service Territory	Tribes with SoCalGas Residential Meters	
20 Tribes		7 Tribes
<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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

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.
- Continued partnership 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,. From May 1 - August 31, 2021, SCIC has participated in building awareness on SoCalGas' Customer Assistance Programs through the following events:
 - Wellness Training Events to over 265 attendees
 - Family Support Outreach Event with over 720 attendees
- ESA Program Manager, Outreach Team and Regional Public Affairs continue to work on strategy to best provide information to tribal leaders and looking at outreach efforts to specific tribes and tribal organizations. Meetings with tribes are being scheduled in Q4 to meet decision requirements and establishing MOUs and Point of Contacts with each tribal entity.



Joint IOU's Unspent Funds for Energy Savings Assistance Program

Low Income Oversight Board Meeting
WebEx
September 29, 2021

PG&E's Unspent ESA Program Funds

Total Remaining ESA Unspent Funds (\$M)	
Unspent Funds through 12/31/2020 [1] [2]	\$197.41
Unspent Funds through 6/30/2021 [3]	\$95.30

1. Unspent Funds through 12/31/2020 is the remaining amount of the ESA program funds collected from 2009-2020 program cycles. The Commission authorized to use this unspent funds for 2021 ESA Program Bridge Period in PG&E's Advice Letter 4351-G-B/6035-E-B for January 1, 2021 - June 30, 2021, for MF CAM activities in 2021, and for PPRS credit per Resolution E-5074.
2. Unspent funds may only be used for ESA program activities.
3. This is the remaining Unspent Funds amount from 2009-2020 program cycles through 6/30/2021. As approved in D.21-06-015, PG&E has used the unspent funds to offset future revenue collections for the 2021-2026 period, starting in July 2021.

SCE's Unspent Funds for ESA Program

Total Remaining Unspent Funds (\$M)	
Total Remaining 2009-2021 Unspent Funds as of 12/31/20	\$105,979,068
Total Remaining 2009-2021 Unspent Funds as of 6/30/21	\$67,866,232

- Unspent funds total as of December 31, 2020.
- The term “Unspent Funds” includes uncommitted and committed unspent funds. Per D.21-06-015 unspent funds will be used to offset future revenue collections for the 2021-2026 period.

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 7/31/2021 [3]	+ \$90.48
Total 2017-2021 Actual Expenses as of 7/31/2021 [4]	- \$84.35
Total Remaining Unspent Funds as of 7/31/2021 [5]	= \$29.45
Total allocated as of 7/31/2021 [5]	- \$9.34
Total Remaining Unspent Funds as of 7/31/2021 [6]	= \$20.11

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.

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
2017-2020-Revenues Collected as of 12/31/2020	\$491.68
2017-2020 Total Expenses as of 12/31/2020 [2]	\$394.62
2017-2020 Unspent Funds as of 12/31/2020 [1]	\$97.06
Total Remaining Unspent Funds as of 12/31/2020	\$222.21
2017-2021-Revenues Collected as of 6/30/2021	\$500.80
2017-2021 Total Expenses as of 6/30/2021 [2]	\$450.61
2017-2021 Unspent Funds as of 6/30/2021 [1]	\$50.19
Total Remaining Unspent Funds as of 6/30/2021	\$175.34
Total Unspent Funds for Bridge Funding Activities [3]	\$67.07
Footnotes	
[1] Unspent Funds related to Revenues Collected.	
[2] Total Expenses from Tables 1 and 1A.	
[3] 2021 Bridge Budget amount approved in Advice Letter 5501-G-A. 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.	

Summer Reliability Ruling Update Governor's Proclamation ESA Impacts

Low Income Oversight Board Meeting
WebEx
September 29, 2021

PG&E Responses to Governor's Emergency Proclamation (R.13-11-005) and Summer Reliability (R.20-11-003)



PG&E did not propose any additions to ESA that were not approved in D.21-06-015. This Decision approved new measures and strategies (including: new criteria based on needs states, and expanded marketing, outreach and leveraging efforts) that may contribute to greater energy efficiency, demand reductions and lower bills.

- **PG&E's ESA, EE and other programs will intensify efforts** to collaborate and refer income-qualifying customers to receive Summer Reliability services for which they may qualify in order to help contribute to demand reductions.
 - For example, PG&E would leverage multiple channels and existing PG&E programs to promote the new **SmartAC** participation option to all residential customers, with intensified focus on low-income customers and those in Disadvantaged Communities.
 - **Power Savers Rewards Pilot (PSRP)** prioritizes the recruiting of Demand Response (DR) MW to be used for emergency purposes while also seeking significant shift and load reduction during peak and net peak periods beginning in 2022 with the response to TOU rates. PSRP includes a **Behavioral DR (Option A)**, an auto-enroll approach to a communication-based program alerting 1.6M customers who receive PG&E's Home Energy Reports to event days to motivate and encourage load reducing efforts during event hours. Option A targets enrollment and communications to a smaller active group of customers and provides incentives for all lower-income and DAC customers, not just those that perform.

SCE's Energy Efficiency (EE) Summer Reliability/Gov. Proclamation

- In response to the Governor's Proclamation, SCE recommended the following in comments:
 - Program-specific modifications
 - Indoor Horticulture Lighting workpaper (SWLG019-01) should receive expedited review and approval
 - Enable a Residential Heat Pump HVAC fuel substitution emergency program (midstream or midstream with direct install for accelerated peak reduction)
 - Allow Strategic Energy Management (SEM) to expand to additional sectors including Commercial, Public and Agricultural
 - Modifications to EE portfolio policy
 - Allow PAs to use a single stage solicitation process through 2023 to enable the prioritization of timely energy savings
 - Non-lead PAs should be allowed to fill gaps left by statewide programs
 - Allow PAs to request additional funding in Program Years (PY) 2022-2023 ABAL to expand cost effective resource programs
 - In reply comments, SCE recommended the following:
 - Synergy proposed to expand the HVAC measure to other microclimates
 - Recommend maintaining exiting approach to reserve HVAC Systems for the hottest climate zones due to potential increase in administrative cost to savings potential.

SCE's DR Program Modifications to Support Summer Reliability

Approved

- Summer Discount Plan (SEP)
 - Removed the 20-hour minimum dispatch requirement
 - Increase residential bill credits from \$140 to \$175
 - Offer a sign-up bonus of \$50 for up to 30,000 accounts for 2021 and 2022
- Smart Energy Program
 - Authorized to offer SEP to all residential customers by 2022 (bundled and unbundled customers)
 - Revise the Medical Baseline prohibition to those with a medical need for air conditioning
- Critical Peak Pricing (CPP)
 - Directed to increase the maximum number of events from 12 to 15
 - Directed to include weekends and holidays as potential call days

Proposed

- Proposed a Whole House Savings Program (WHSP) Pilot that will compensate customers for demonstrated load reduction.
- Allow dual participation between SDP, SEP and other specified DR Pilots
- Temporarily increase the smart thermostat incentive to \$125



SDG&E's ESA Program Response to Governor's Proclamation

- Integrating Energy Efficiency investments with ESA Program efforts

SDG&E currently offers energy efficient measures through its ESA Program. These measures are installed to income eligible customers at no cost, as long as the installation criteria has been met. Integration with EE programs is viable as long as those ESA eligible customers are offered all eligible measures through the ESA Program first, providing the customer the opportunity to benefit from program services at no cost.

SoCalGas ESA Program Response to Governor's Proclamation*

- **Addition of Tankless Water Heaters**
 - No-cost installation of energy-savings program services to low-income residential customers, delivered through a network of contractors experienced in reaching the low-income community.
 - Target market is the residential high gas users during the non-winter period to identify high domestic hot water users.
- **Expanded Funding for Solar Thermal Water Heating**
 - D.21-06-015 approved solar thermal water heating as a measure in SoCalGas's ESA program design for the 2021-2026 program cycle.
 - Expanded funding would allow more homes to receive this measure than originally planned.
 - Target market is the high gas users during the non-winter period to identify high domestic hot water users.
- **Continued Support for Project HomeKey**
 - Presently, SoCalGas is partnering with MF property owners on Project HomeKey to deliver ESA Program common area and in-unit services to all qualifying properties in its territory.
 - In 2023, per D.21-06-015, ESA Program multi-family in-unit and common area services will be implemented by third-party via the Multi-family Whole Building (MFWB) Program.
 - As the third-party MFWB Program ramps up beginning in 2023, SoCalGas recommends continuing to offer common area and in-unit services for Project HomeKey sites through 2023 to ensure program services continue uninterrupted for Project HomeKey sites in support of the Governor's Proclamation.

*Governor's Proclamation of a State of Emergency, July 30, 2021, available at

<https://www.gov.ca.gov/wp-content/uploads/2021/07/Energy-Emergency-Proc-7-30-21.pdf>.

COVID-19 IMPACTS

Transition Plan Activities

PSPS

Moratorium Extension

Low Income Oversight Board Meeting
WebEx
September 29, 2021



COVID-19/Transition Plan Q3 Update

	CARE/FERA	ESA	Medical Baseline (MBL)	Communications
PG&E	Resumed CARE recertification and post-enrollment verification on July 1, 2021	Due to renewed COVID impacts within the last two months, implementers have not been meeting their monthly homes treated targets increasing risk of not being able to reach the 100,000 homes treated goal (July homes treated missed by 7% , Aug homes treated missed by 10%)	Customers have 90 days for their medical practitioner to certify their eligibility (they immediately get PSPS notifications when customer applies, even with pending application) – customers get a reminder notice at 45 days to remind them if there is an open certification	PG&E continued the outbound calling campaign in order to reach customers with past due accounts. The outbound calls provided customers with flexible pay plans as well as information about CARE, FERA, Medical Baseline, LIHEAP, AMP and other assistance programs
SCE	Resumed CARE recertification on July 1, 2021. CARE High Usage Verification (HU PEV) resumed in August 2021 which an initial run of about 200 HU PEV requests to monitor functionality in new operating system. Traditional PEV to resume in Q4 2021 pending technical enhancements.	<ul style="list-style-type: none"> - ESA contractors are continuing to offer program services while following state and local safety protocols. - Continuing to offer Virtual enrollments. - Conducted COVID safety and exposure reporting refresher training 	Increase Medical Baseline enrollment based on patient enrollments relative to 2019 levels by: 7% percent in 2021, 8% percent in 2022, 9% percent in 2023, per E-5196	SCE conducted two webinars to provide LIHEAP Local Service Providers an overview of customer assistance programs available to help pay electric bills when customer protections end in June 2021



COVID-19/Transition Plan Q3 Update

	CARE/FERA	ESA	Medical Baseline (MBL)	Communications
SDG&E	Resumed CARE and FERA recertification and post-enrollment verification requests on July 1, 2021.	100% of ESA contractors are operational. Contactors are seeing an increase in customers enrolling via phone as COVID cases increase.	Resumed medical practitioner certification requirement for new enrollments and recertification requests on July 1, 2021.	Updates to sdge.com/covid , targeted email/direct mail to residential & small business customers in arrears, CBO engagement promoting available assistance programs & payment plans, bill messages, and social media posts. ERAP outbound calls, follow-up emails, and customer assistance PSA-style TV interviews.
SoCalGas	Resumed CARE recertification and post-enrollment verification processes on July 1, 2021	Operating at 100% following CDC local and State guidelines and protocols. All Prime Contractors who accepted an advance payment are scheduled to zero out their balances no later than December 31, 2021.	Resumed MBL recertification process on July 1, 2021.	A bill envelope message to all residential customers promoting socialgas.com/Coronavirus ; Targeted bill messages to CARE, residential, and business customers promoting assistance programs/payment assistance; Social media messaging promoting assistance programs/creating awareness of utility scams; An email to all residential customers in arrears promoting assistance programs; A community newsletter with information on assistance programs/payment assistance; Ongoing updates to socialgas.com/Coronavirus as needed.

What weather could lead to a PSPS?

As each weather situation is unique, we carefully review a combination of factors when deciding if power must be turned off. Some factors include:



Low Humidity Levels

generally 20% and below



Forecasted Winds

above 25 mph and gusts above 45 mph



A Red Flag Warning

issued by the National Weather Service



Condition of Dry Material

on the ground and live vegetation

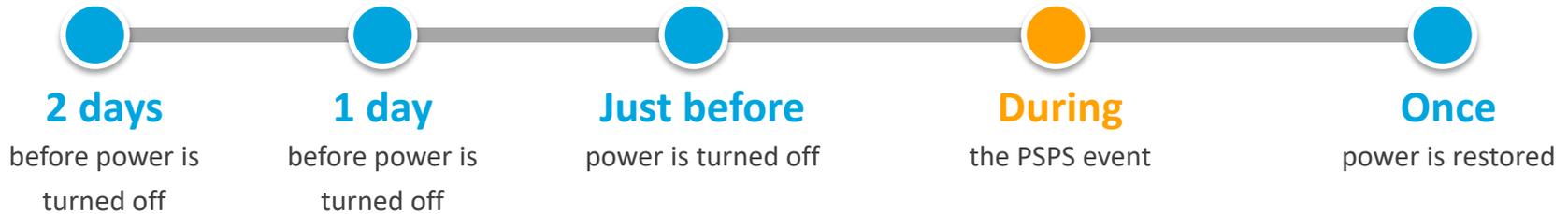


On-the-ground, Real-Time Observations

Advance PSPS Notifications

We provide advance notice prior to turning off power and updates until power is restored. Notifications include details about **when it's anticipated that the power will be shut off and restored.**

Timing of Notifications (when possible)



PG&E ACCOUNT HOLDERS

Notifications sent via automated calls, texts and emails. To update contact information:

CALL: 866-743-6589

pge.com/mywildfirealerts

SOCIAL MEDIA

@pacificgasandelectric
 @PGE4Me
 @pacificgasandelectric

NON-ACCOUNT HOLDERS

Receive notifications for any address. Update contact information at:

pge.com/pspsalerts

BUSINESSES AND MASTER METER

Learn More

pge.com/pspsupdates

pge.com/beprepared

PSPS Customer Resources



PG&E'S WILDFIRE SAFETY WEBSITE

pge.com/wildfiresafety



WEATHER AND PSPS FORECASTING

Live weather information, a 7-day PSPS potential lookahead and images from PG&E's high-definition cameras deployed in high fire-threat areas.

pge.com/weather



BACKUP POWER

Information on backup power options, safety tips, financing options, a marketplace to search major backup power retailers and more.

pge.com/backuppower



SAFETY ACTION CENTER

Information about wildfire risks and what customers can do before, during and after an emergency to keep their home, family or business safe.

safetyactioncenter.pge.com



MEDICAL BASELINE PROGRAM

Learn more about PG&E's Medical Baseline Program for those who rely on power for medical devices.

pge.com/medicalbaseline

Update contact information to receive PSPS notifications

Tenants and non-account holders can sign up to receive PSPS alerts for any address where they do not have a PG&E account.

pge.com/pspsalerts

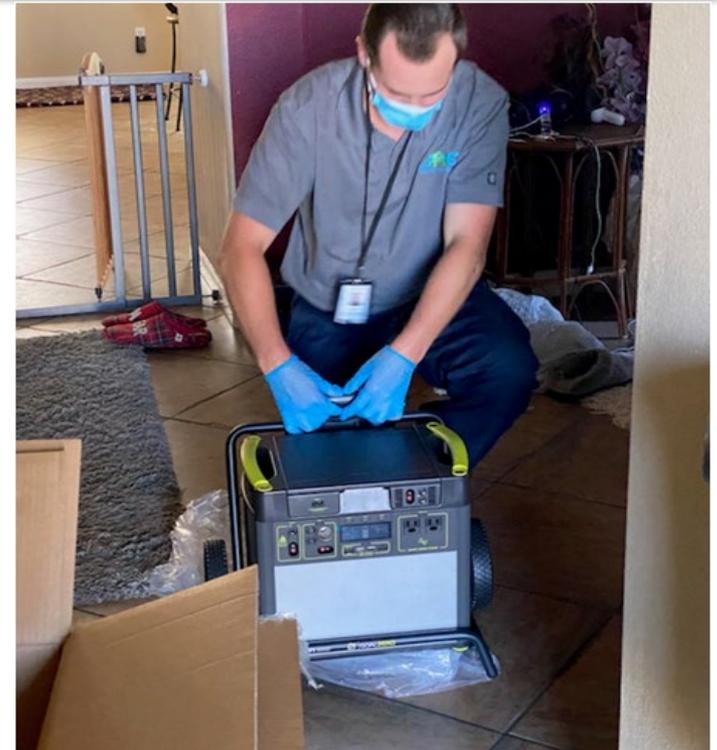
Critical Care Backup Battery Program

CRITICAL CARE BACKUP BATTERY (CCBB) PROGRAM	ELIGIBILITY REQUIREMENTS	BATTERY OFFERING
<p>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 electrically powered medical devices to help sustain life.</p>	<p>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.</p>	<p>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.</p>

PROGRM SUMMARY THROUGH AUGUST 2021

2021 Enrollments	5,003
2021 Battery Deployments	4,542
2020-YTD Enrollments	5,781
2020-YTD Deployments	5,268

- ❖ New customers are identified each month and sent direct mailers and emails informing them about the program.
- ❖ CCBB objective is to enroll as many eligible customers who are willing to participate in the program.



Marketing Objective

- Raise awareness about the COVID customer protections ending in June 2021
- Disconnection moratorium extended to Sept 30.
- Raise awareness about other SCE assistance programs available to customers
- Shift perception of SCE as a supportive partner, not a distanced utility



Audience

Residential and Business customers who have 60+ days of arrears

- Residential - 451,152 (261,363 email)
- Business - 25,415 (10,004 email)
- Medium & Large Business - 8,107

Channels, Timing & Quantities

Emails

- April 29 - 126,057
- April 29 - Business 10,004
- May 3 - 135,306

Letters

- May 14 - 93,407
- May 17 - 116,555
- May 18 - 241,190

Biz Postcard

- May 17 - 25,415

Medium and Large Business Customers

Letters

- June 2 - 8,107

Support for Vulnerable Customers



SDG&E partners with 211 San Diego and 211 Orange County and community organizations to offer support to customers with access and functional needs and, especially those who may be vulnerable during PSPS



Available Services



Readiness Support



Amplified Notifications



Accessible Transportation



Hotel Stays



Food Support



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

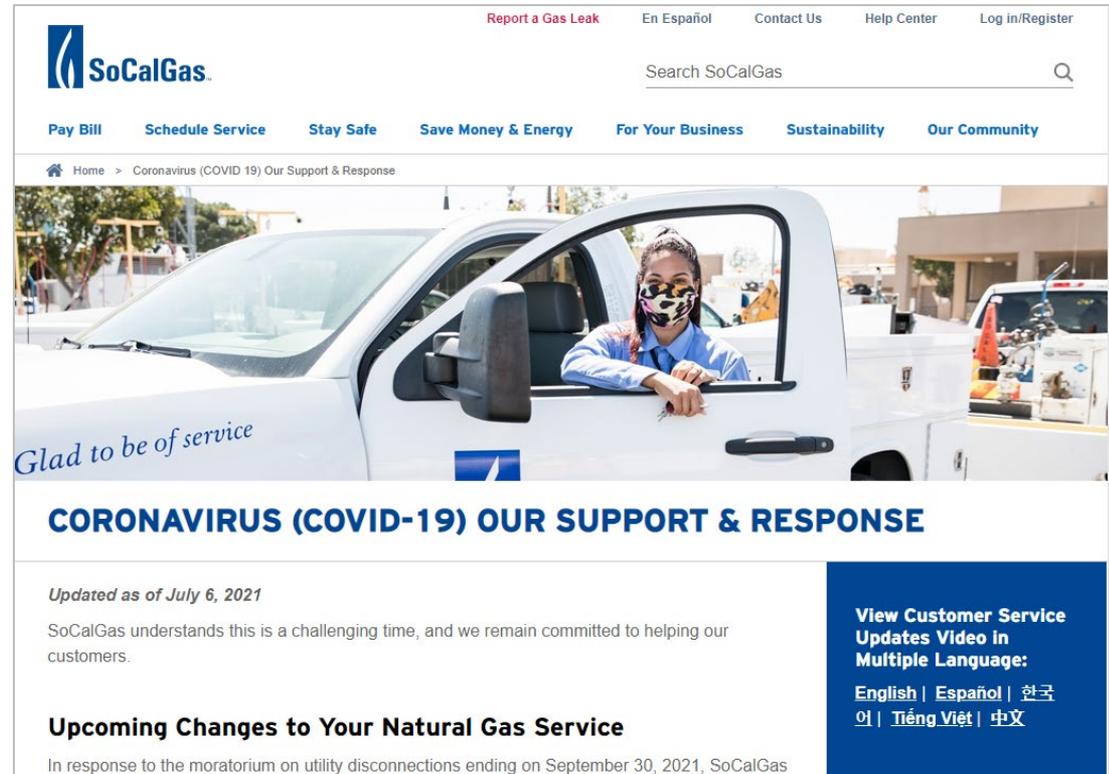
- Rebate of \$300 for portable gas generators (\$450 for CARE customers) through local and online retailer
- All customers in High Fire Threat District (HFTD) who have experienced a 2019 or 2020 PSPS outage are eligible
- In 2021, over 55,000 qualifying customers will be invited to participate



Moratorium Extension

Updates to SoCalGas Website and Talking Points

- In response to the extension of the moratorium on utility disconnections through September 30, SoCalGas updated its website and talking points to reflect the new date.
- Talking points are distributed to SoCalGas teams and the call center to ensure the most up-to-date messaging is always available to internal and external audiences.



socalgas.com/Coronavirus

Note: Above image is for reference only and is outdated as of 9/21/21 due to recent web updates.