



Joint IOU's Energy Savings Assistance Program Solicitations and Contractor Funding

Low Income Oversight Board Meeting

WebEx

December 15, 2021

ESA Contractor Funding Update

PG&E	SCE	SDG&E	SoCalGas
<ul style="list-style-type: none"> • ESA Implementation Budget Increased by 26%: PG&E informed Implementers on November 4th. • Budget Increase includes measures, implementer fees and bulk materials purchasing-related costs. • Incremental funding accomplishes the following: 1) a glide path into the new program and 2) an opportunity to retool the workforce to enable contractors to continue to evolve to meet the future evolution of the ESA program. 	<ul style="list-style-type: none"> • SCE has started to inform some of our contractors of the spending forecasts for 2022. We expect to provide all contractors the 2022 forecasts by the end of the year. • SCE is planning to monitor and forecast the amount of work and budget monthly in 2022 and continue to assign work during the transition period until budget is exhausted. There is the potential to reallocate budget by contractors if applicable. • SCE is planning to commit dollars from 2021 to serve customers enrolled in that year, to supplement 2022 contractor installation work. • SCE plans to communicate the 2022 forecasts to contractors via email and offer follow up meetings. SCE will continue to discuss the 2022 plan and any changes with contractors during regular one-on-one meetings. 	<ul style="list-style-type: none"> • SDG&E contracts were updated mid-2021 and are funded through 2022. • Contractors were notified of funding levels during the contract review process. • SDG&E 2022 budget exceeded 2021 and therefore contractors have not been impacted by reductions. • SDG&E keeps contractors informed of program changes through regularly scheduled contractor meetings. 	<ul style="list-style-type: none"> • SoCalGas' budget for ESA Program in-home services decreased in 2022 from 2021 levels by approximately 14%. • SoCalGas contacted/called each contractor individually to discuss 2022 forecasted budget needs and impacts of 2022 contract amounts. • As of 12/01/2021, all SoCalGas ESA Program contractors have been informed of their 2022 contract amounts. • SoCalGas will continue to discuss 2022 plans and changes with contractors during ad-hoc one-on-one meetings and all contractor meetings.

ESA Programs Contractor Solicitations Update

PG&E	SCE	SDG&E	SoCalGas
<p>Main ESA (Basic/Plus) Program:</p> <ul style="list-style-type: none"> Nov 12, 2021: RFP Released Nov 29, 2021: Bidders Conference Jan 18, 2022: Bidders Proposal Due Q3 2022: Program Launch <p>ESA Pilot Plus/Deep:</p> <ul style="list-style-type: none"> Q1 2022: Planned RFP Release* Q1 2022: Bidders Conference Q3 2022: Program Launch <p>ESA Bulk Materials:</p> <ul style="list-style-type: none"> Feb 2022: Planned RFP Release Feb 2022: Bidders Conference Apr 2022: Bidders Proposal Due Nov 2022: Program Launch <p>MFWB:</p> <ul style="list-style-type: none"> Jan 2022: Planned RFP Release Jan 24, 2022: Bidders Conference Mar 2022: Bidders Proposal Due Feb 2023: Program Launch <p>Joint IOU Supplier Diversity Contractor Symposium:</p> <ul style="list-style-type: none"> Jan 12, 2022 (Registration by Dec 3, 2021) <p>*Contingent on AL 4530-G/6412-E approval</p>	<p>Building Electrification Pilot:</p> <ul style="list-style-type: none"> RFP Release 11/30/21 Bidder conference 12/8/21 Proposals due 1/14/22 <p>Clean Energy Homes Pilot:</p> <ul style="list-style-type: none"> RFP Release 12/20/21 Bidder conference 1/10/22 Proposals due 2/15/22 <p>Single-Family Core Program:</p> <ul style="list-style-type: none"> RFP Release Expected March 2022 <p>Pilot Plus and Pilot Deep (SCE/SCG)</p> <ul style="list-style-type: none"> RFP Release Expected February 2022 Release date tentative and based on AL approval <p>Conducted 3 Bidders Training Workshops in October 2021:</p> <ul style="list-style-type: none"> Recording and Q&A document posted on PEPMA and sce.com <p>SCE Vendor Networking Event:</p> <ul style="list-style-type: none"> Held on 11/30/2021 SCE shared vendor contact info to those that opted in on Contact Information Sharing Consent Form <p>Joint IOU Symposium on January 12, 2022</p>	<ul style="list-style-type: none"> Southern Multifamily Whole Building RFP scheduled release is January 14, 2022. Bidders Workshop/Conference is scheduled for January 24, 2022. Pilot Plus/Pilot Deep RFP scheduled release is February 8, 2022. Bidders Conference is scheduled for February 16, 2022. Single Family + Mobile Home RFP scheduled release is March 1, 2022. Bidders Conference is scheduled for March 11, 2022. IT Solutions RFP is scheduled for release March 15, 2022. Bidders conference date is TBD. Joint IOU Supplier Diversity Symposium is scheduled for January 12, 2022. 	<p>Solicitation 101 Workshop</p> <ul style="list-style-type: none"> On November 16, 2021, SoCalGas held a joint Solicitation 101 Workshop with SDG&E. <p>Core ESA Program (ESA Program In-Home Program Services)**</p> <ul style="list-style-type: none"> Q2 2022: Planned RFP Release Q2 2022: Bidders Conference Q2 2022: Bidders Proposal Due Q1 2023: Program Launch <p>Customer Experience Technology Platform and Customer Online Audit**</p> <ul style="list-style-type: none"> Q1 2022: Planned RFP Release Q1 2022: Bidders Conference Q2 2022: Bidders Proposal Due Q1 2023: Platform Launch <p>ESA Pilot Plus/Deep (Joint Pilot with SCE)**</p> <ul style="list-style-type: none"> Q1 2022: Planned RFP Release* Q1 2022: Bidders Conference Q1 2022: Bidders Proposal Due Q3 2022: Program Launch <p>Joint IOU Supplier Diversity Symposium</p> <ul style="list-style-type: none"> The Joint IOU Supplier Diversity Symposium is scheduled for January 12, 2022. <p>** Schedules subject to change.</p>



Joint IOU Report of the CARE and ESA Programs

Low Income Oversight Board Meeting
WebEx
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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	\$9,954,665	70%	\$763,761,998
SCE	\$9,257,045	\$4,312,118	47%	\$528,937,534
SDG&E	\$6,622,169	\$3,672,034	55%	\$144,935,207
SoCalGas	\$9,859,663	\$6,057,163	61%	\$143,103,493
Total	\$39,889,477	\$23,995,980		\$1,580,738,232

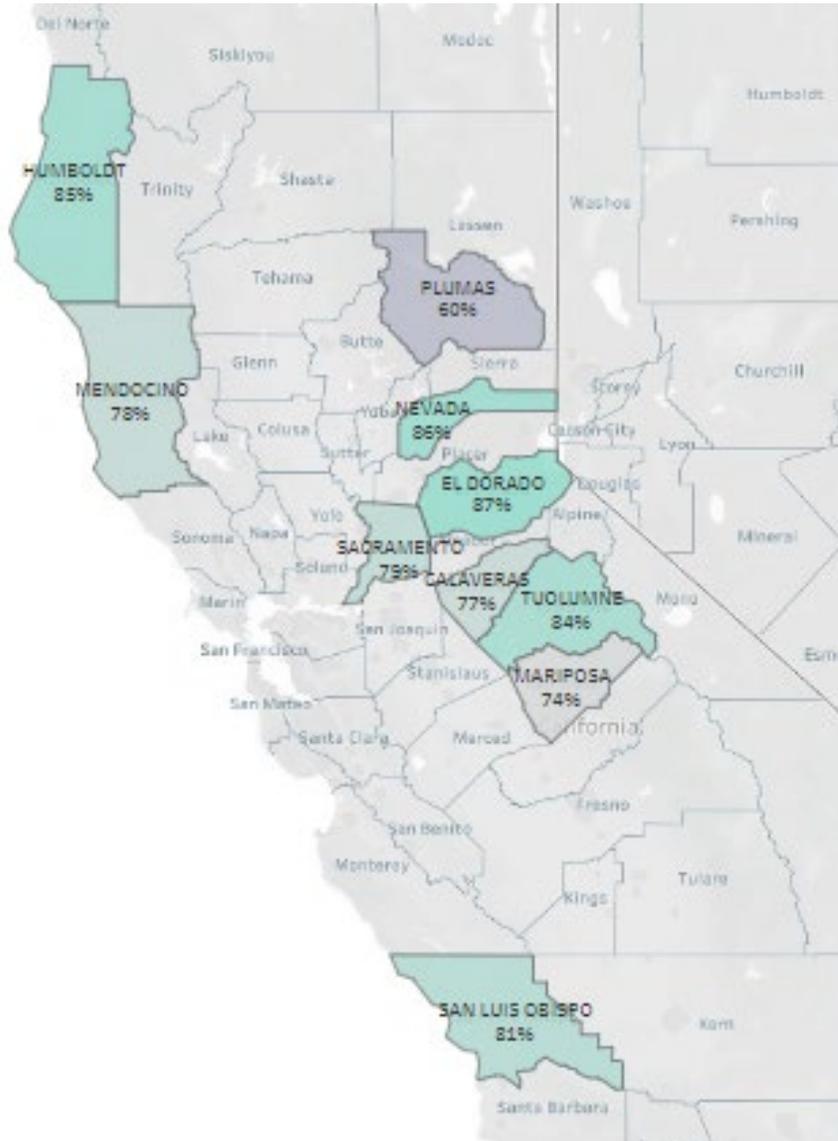
2021 YTD Enrollment and Penetration						
Utility	Total Residential Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled	Penetration Rate	Newly Enrolled Customers
PG&E	5,583,279	1,447,571	26%	1,604,040	111%	182,760
SCE	4,505,454	1,349,716	30%	1,450,925	107%	183,583
SDG&E	1,380,027	293,584	21%	333,152	113%	52,109
SoCalGas**	5,683,778	1,715,832	30%	1,845,546	108%	226,880
Total	17,152,538	4,806,703		5,233,663		645,332

* Authorized budgets pursuant to Decision 21-06-015. 2021 YTD through October 31, 2021, as reported in the IOU ESA-CARE Monthly Report (filed November 22, 2021).

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

CARE Program *CARE Penetration map*

PG&E



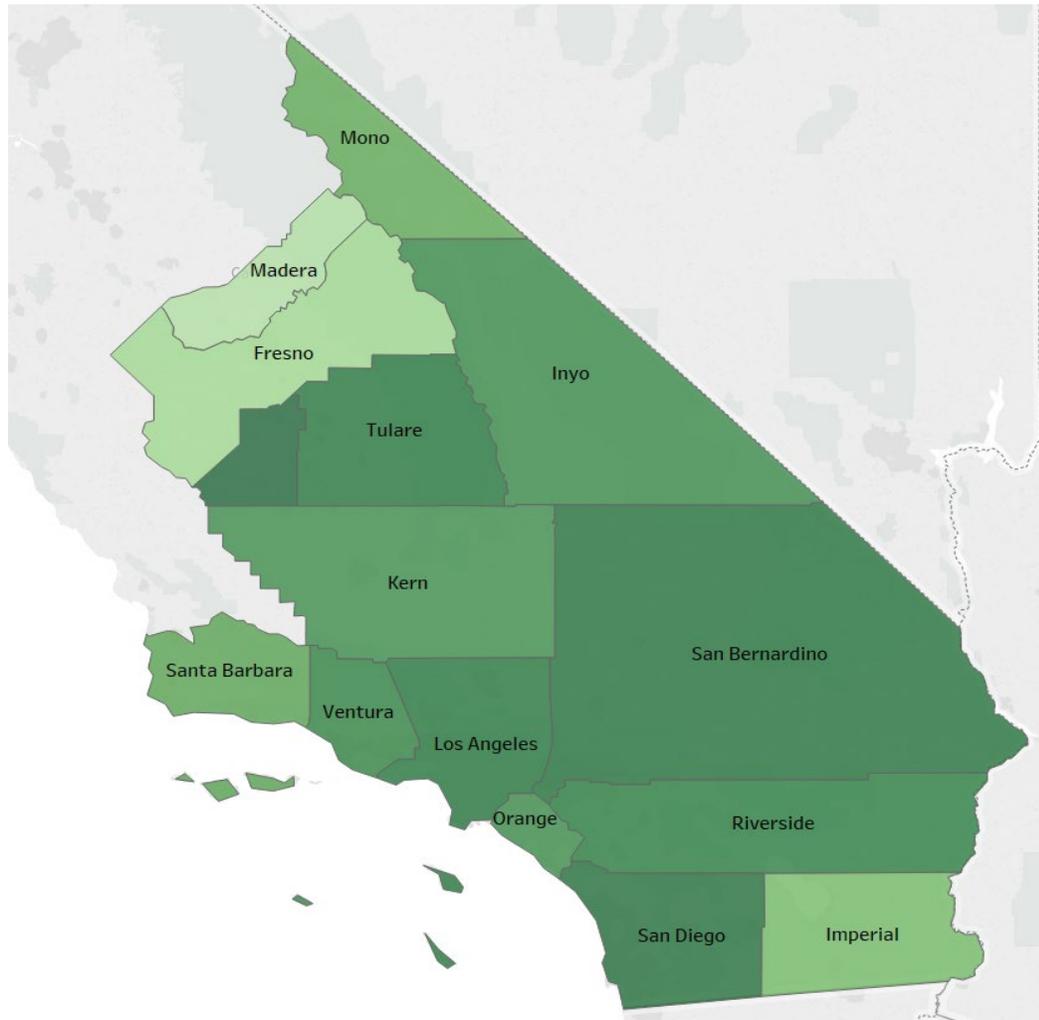
PG&E Counties With Lowest Penetration Rates	
County	Penetration Rate*
PLUMAS	60%
MARIPOSA	74%
CALAVERAS	77%
MENDOCINO	78%
SACRAMENTO	79%
SAN LUIS OBISPO	81%
TUOLUMNE	84%
HUMBOLDT	85%
NEVADA	86%
EL DORADO	87%

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

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

CARE Program *CARE Penetration map*

SCE



County	Penetration Rate*
San Bernardino	140%
Riverside	134%
Kings	112%
Los Angeles	103%
San Diego**	100%
Tulare	98%
Ventura	98%
Orange	89%
Inyo	75%
Kern	72%
Santa Barbara	65%
Imperial**	47%
Mono	44%
Fresno**	11%
Madera**	0%

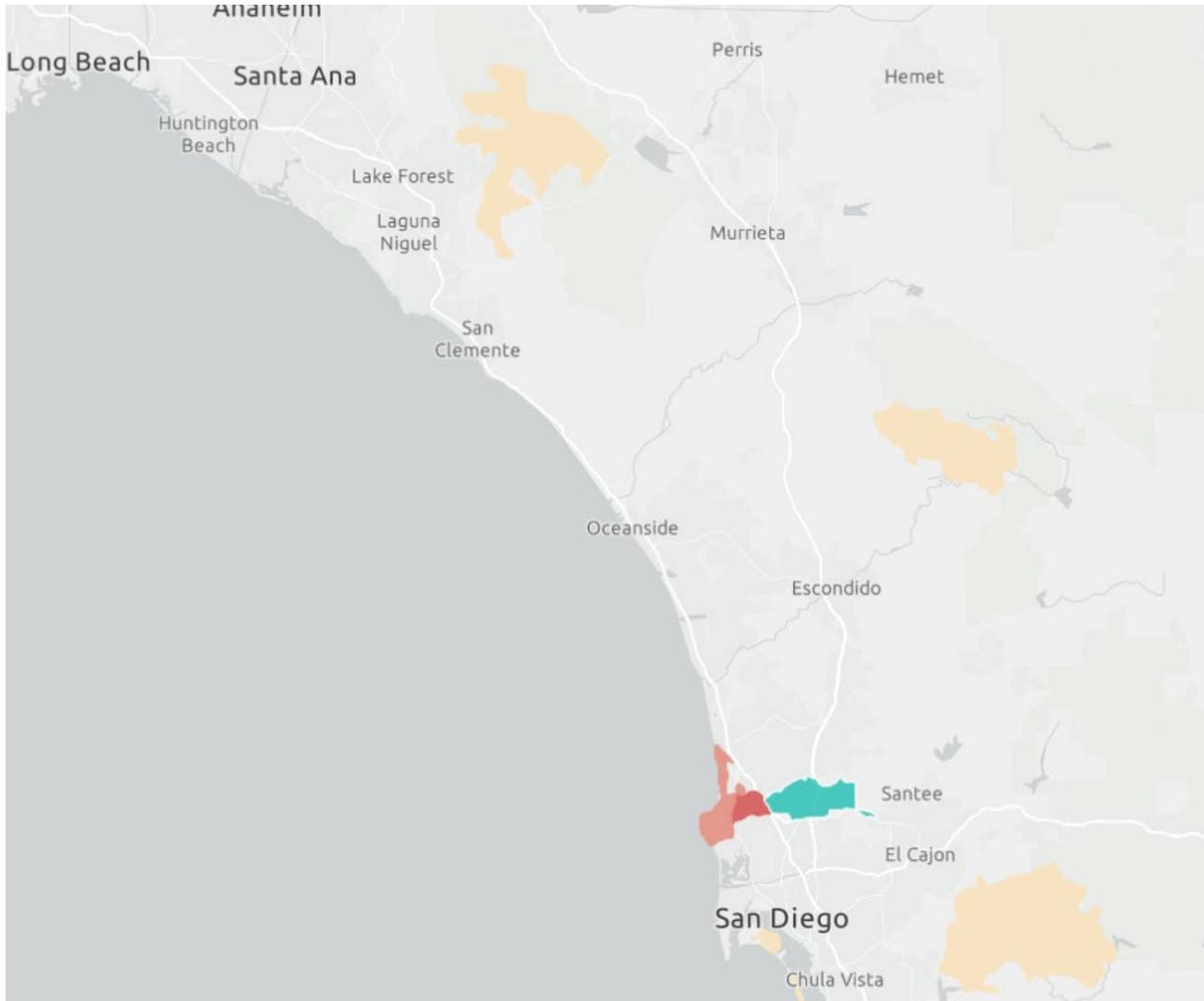
*Represents the penetration rates for all SCE counties effective October 31, 2021.

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

CARE Program *CARE Penetration map*



SDG&E



Zip codes with lowest penetration (overall)

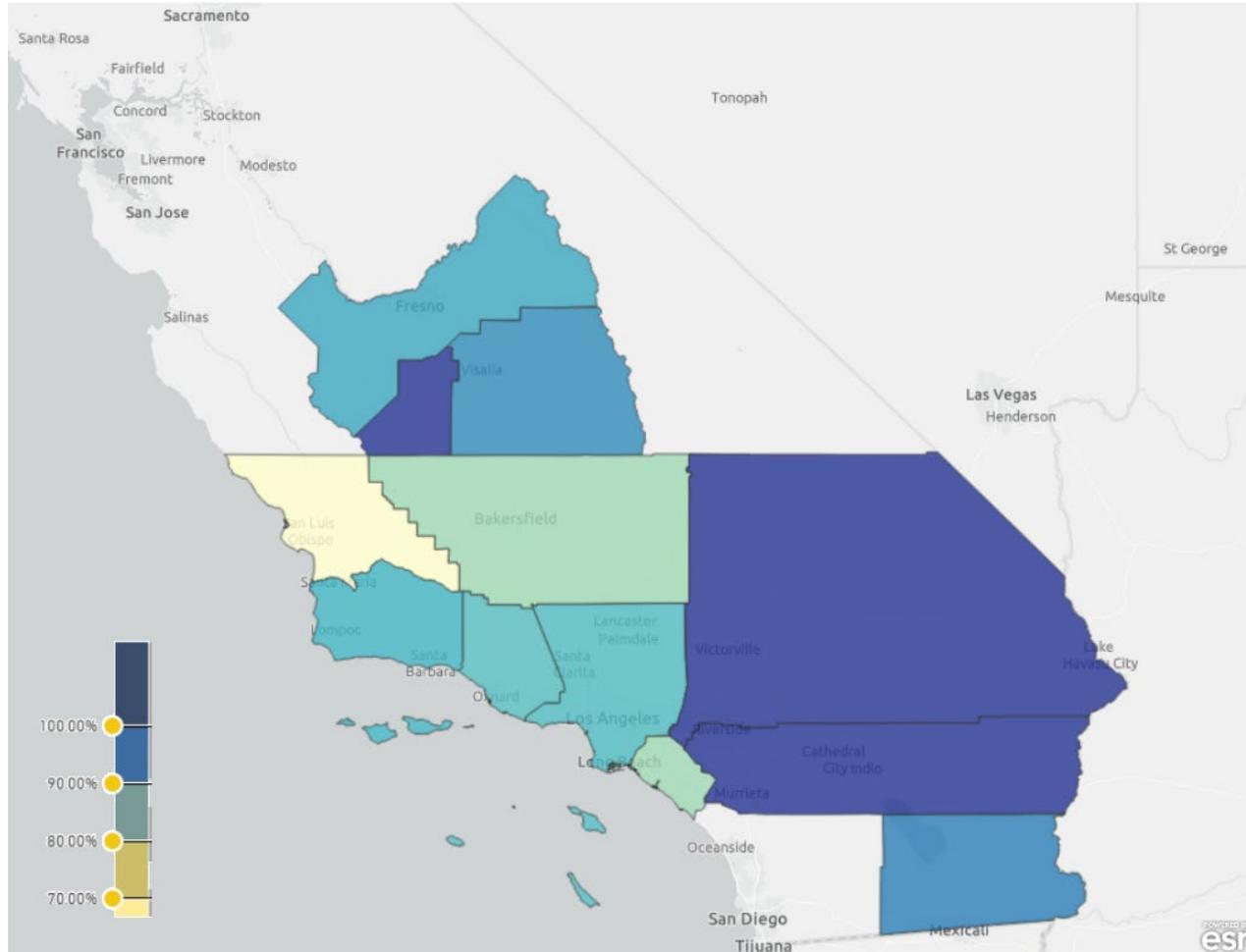
City	Penetration Rate
Miramar	8%
Coronado	34%
La Jolla	43%
Trabuco Canyon	43%
Jamul	54%
UTC	54%
Pauma Valley	57%

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

CARE Program *CARE Penetration map*



SoCalGas



County	Penetration Rate *
San Bernardino	159%
Riverside	139%
Kings	118%
Fresno	115%
Santa Barbara	107%
Tulare	106%
Imperial	104%
Los Angeles	100%
Ventura	98%
Kern	97%
Orange	90%
San Luis Obispo	79%

*Represents the penetration rates for all SoCalGas counties effective October 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 ESA Program Budget Updates (July 1, 2021 through October 31, 2021) *

July – December 2021 Authorized Program Budgets and Expenditures			
Utility	Authorized Budget ¹	YTD Expenditures ²	%
PG&E	\$113,791,260	\$55,722,089	49%
SCE	\$40,926,751	\$28,881,724	69%
SDG&E	\$11,768,190	\$5,525,301	47%
SoCalGas	\$67,066,667	\$28,718,322	43%
Total	\$233,552,868	\$118,847,436	51%

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 October 2021 IOU ESA-CARE Monthly Report (filed November 22, 2021).



Energy Savings Assistance Program

2021 Energy Savings Targets (July 1, 2021 through October 31, 2021)

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	18,280,230	12,500	207,649,152	10,764,166	2.2%	0.0	N/A	N/A
SCE	15,180,527	N/A	51,438,933	N/A	29.5%	N/A	N/A	N/A
SDG&E	543,915	25,135	18,301,272	965,237	3%	2.6%	N/A	N/A
SoCalGas	N/A	275,187	N/A	12,970,838	N/A	2.1%	N/A	N/A
TOTAL	34,004,672	312,822	277,389,357	24,700,241			N/A	N/A

¹ Beginning July 1, 2021 for Program Cycle 2021-2026, as reported in the October 2021 IOU ESA-CARE Monthly Report (filed November 22, 2021).

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

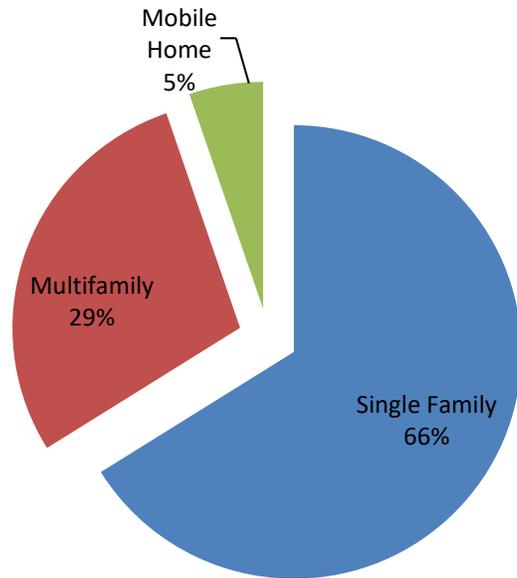
³ Per Decision 21-06-015.



Energy Savings Assistance Program

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**ESA 2021 SW
Participation By Type**



**2021 Households Treated
(July 1, 2021 through October 31, 2021)**

2021 Households Treated ¹				
Utility	Est. HH Treated Target	Total	Total as % of 2021 Treated	Total as % of Eligible ESA HH ²
PG&E	50,000	31,809	64%	2%
SCE	43,562	31,577	72%	2.32%
SDG&E	5,973	3,982	67%	1.4%
SoCalGas	60,000	38,480	64%	1.98%
Total	159,535	105,848		

¹ Beginning July 1, 2021, for Program Cycle 2021-2026 as reported in the October 2021 IOU ESA-CARE Monthly Report (filed November 22, 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 October 2021, PG&E's SPOC has referred 89 multifamily customers to 26 program offerings YTD., and 19 referrals have been converted to program applications.
- **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 28 referrals across its ESA & ESA CAM programs. In October, the SPOC also shared the 89 properties that have been treated and identified by ESA CAM to the SOMAH program.
- **SoCalGas:** Through October 31, 2021, SoCalGas' SPOCs continue to build a steady pipeline of CAM projects. SoCalGas recently added several projects with the Los Angeles Housing Development Authority (LACDA) and continues to coordinate with various Project Homekey sites and other major property owners such as Excel Residential, National Core and Los Angeles Family Housing.

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

- **PG&E:** As of October 2021, PG&E has successfully completed 60 ESA CAM projects and treated 435 buildings and 4,529 units YTD. The program continued outreach and enrollment effort for the 2022 program year, PG&E has enrolled 47 buildings and audited 45 buildings YTD for 2022. All 184 pipeline projects have completed construction before the program's September 1, 2021 deadline.
- **SCE:** As of October 2021: Deed Restricted: In progress – 21 Whole Building, 21 Common Area, 11 In-Unit. Deed Restricted: Completed – 14 Whole Building, 5 Common Area, 13 in-unit. Market Rate: In progress – 12 in-unit. Market Rate: Completed – 31 in-unit.
- **SDG&E:** October 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 22 properties, benefiting 127 buildings and 1,599 units in 2021.
- **SoCalGas:** As of October 31, 2021, SoCalGas has completed nineteen (19) projects, serving nearly 1,600 units. There are 22 projects in various stages of completion, with the goal of final installation completed by year end 2021. Several projects may be completed in 2022 due to on-going supply chain issues with boiler manufacturers and delivery timelines.

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 October 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 Arena 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	Laytonville Rancheria (Cahto), Manchester Point Arena 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	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	North Fork Mono
Tribes and Housing Authority sites involved in Focused Project/ESA Partnership offer on Tribal Lands	3	<p>Complete in 2019: Yurok Tribe</p> <p>Complete in 2020: None due to COVID-19</p> <p>Completed in 2021: Bear River Band of Rohnerville Rancheria Northern Circle Housing Authority Hopland Reservation Sherwood Valley Band of Pomo Indians</p>
HA and Tribal Temporary Assistance for Needy Families (TANF) offices who received outreach (this includes email, U.S. mail, and/or phone calls)	38	<p>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</p> <p>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</p>
HA and TANF offices who participated in Meet and Confer	16	<p>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</p> <p>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</p>

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 30 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.
- PG&E assigned ESA contractors for the Bear River Band of Rohnerville and the Northern Circle Housing Authority Hopland Reservation and the Sherwood Valley Band of Pomo Indians. A total of 39 households were provided assessments and installations.
- 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.
- A PG&E 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
- The ESA Program presented to the Chemehuevi Tribe during a council meeting on September 25, 2021. The purpose of the meeting was to present the ESA services and get tribal approval to treat approximately 77 homes owned by the tribe. The ESA Program treated some of these properties in 2017 with HVAC replacements, however, SCE saw an opportunity to potentially provide new measures that were not available in 2017 to these residences (e.g., Smart Thermostats). SCE received the Property Owners Authorization from the tribal council on September 29, 2021. SCE’s approved ESA contractor met with Chemehuevi’s housing coordinator in October and discussed the treatment timeline planning to commence in November.

#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 these 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	9	1,286
	Messaging	24	11,873
	Presentation	3	120
	Total	36	13,279
SCTCA	Events	1	30
	Messaging	11	66,410
	Presentation	2	27
	Total	14	73,732
Total Activity		50	79,746

*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 (Cuyapaipe 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 (Cuyapaipe 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 September 1 - October 31, 2021, SCIC has participated in building awareness on SoCalGas' Customer Assistance Programs through 9 Financial Wellness Training Events with over 517 attendees.
- ESA Program Manager, Outreach Team and Regional Public Affairs continue to work on strategies to best provide information to tribal leaders and are 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.
- Additional meetings in Q4 with other organizations working in American Indian / Tribal Communities to assist in building awareness on Customer Assistance Programs.



Joint IOU's Unspent Funds for Energy Savings Assistance Program

Low Income Oversight Board Meeting
WebEx
December 15, 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 10/31/2021 [3] [4]	\$84.77

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 Unspent Funds amount from 2009-2020 program cycles and new revenue collected in 2021.
4. PG&E exhausted all gas unspent funds collected from 2009-2020 program cycles in May 2021 therefore new gas revenue was collected in 2021 for ESA program. PG&E did not collect new electric revenue for ESA program in 2021 as PG&E used the electric unspent funds to offset electric revenue collection in 2021, as approved in PG&E's Advice Letter 4351-G-B/6035-E-B and D.21-06-015.

SCE's Unspent Funds for ESA Program

Total Remaining Unspent Funds (\$M)	
Unspent Funds through 12/31/20 [1][2]	\$105.98
Unspent Funds through 10/31/21 [3]	\$41.14

1. Unspent funds through December 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 SCE's Advice Letter 4053-E 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 October 31, 2021. As approved in D.21-06-015, SCE has used the unspent funds to offset future revenue collections for the 2021-2026 period.

SDG&E's Forecasted 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 12/31/2021 [3]	+ \$90.58
Total 2017-2021 Actual Expenses as of 12/31/2021 [4]	- \$91.21
Total Remaining Unspent Funds as of 12/31/2021 [5]	= \$22.69
Total allocated as of 12/31/2021 [5]	- \$8.51
Total Remaining Unspent Funds as of 12/31/2021 [6]	= \$14.18

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
2017-2021A Revenues Collected as of 6/30/2021	\$500.80
2017-2021A Total Expenses as of 6/30/2021 [2]	\$450.61
2017-2021A Unspent Funds as of 6/30/2021 [1]	\$50.19
Total Remaining Unspent Funds as of 6/30/2021	\$175.34
2021B Revenues Collected as of 10/31/2021 [3]	\$0.00
2021B Total Expenses as of 10/31/2021 [2] [3]	\$28.72
Total Remaining Unspent Funds as of 10/31/2021 [1]	\$146.62
<u>Footnotes</u>	
[1] Unspent Funds related to Revenues Collected.	
[2] Total Expenses from Tables 1 and 1A.	
[3] 2021B denotes the start of the new program cycle beginning July 1, 2021	
Note: Unspent funds can only be used for ESA Program activities or returned to ratepayers.	

COVID-19 IMPACTS

Transition Plan Activities

PSPS

Low Income Oversight Board Meeting
WebEx
December 15, 2021



COVID-19/Transition Plan Q4 Update

	CARE/FERA	ESA	Medical Baseline (MBL)	Communications
PG&E	<p>PG&E continued to co-promote AMP to eligible customers through the CARE/FERA Recertification direct mail and email communications. Emails also include a call to action to visit the Customer Financial Support landing page for additional resources.</p> <p>The Q4 FERA acquisition email co-promotes LIHEAP and targeted over 770,000 customers. The multicultural digital campaign continues through Q4 with display ads, paid search and Google discovery ads targeted in Chinese, Vietnamese, Korean, and Russian driving to the in-language version of the CARE/FERA landing page, which also includes links to the Customer Financial Support landing page.</p>	<p>Due to renewed COVID-19 impacts within the last three months, implementers have not been meeting their monthly homes treated targets increasing risk of not being able to reach the 50,000 homes treated goal. (September homes treated missed by 6% , October homes treated missed by 13%, and November homes treated missed by 10%)</p> <p>Q4 ESA email/direct mail campaign deployed to approximately 100,000 CARE enrolled customers, in English and Spanish. Drives to ESA landing page where program information is available in 16 languages.</p> <p>Digital marketing campaign, including, search marketing and other digital advertising continues through December.</p>	<p>The CPUC issued Res. E-5169 in September 2021. Pursuant to this resolution:</p> <ul style="list-style-type: none"> PG&E, SCE, SDG&E and SoCalGas will be filing joint motion late December 2021 for consideration of a study of the population in each utility's service territory eligible for MBL. PG&E will establish a goal to increase MBL enrollment relative to 2018 levels by 7% in 2021, 8% above 2018 levels in 2022, and 9% above 2018 levels in 2023. PG&E will report progress on MBL enrollment goals as part of the required monthly disconnection reports filed in R.18-07-005, beginning with the reports filed in December 2021. 	<p>PG&E continued the outbound calling campaign in order to reach customers with past due accounts.</p> <p>Targeted email campaign to customers enrolled in COVID Relief Payment Plan to cross-promote ERAP, LIHEAP, CARE, FERA, Medical Baseline and Low-Cost Home Internet.</p> <p>Email campaign to AMP eligible customers to increase enrollment in AMP, Reach, LIHEAP and Low-Cost Home Internet.</p> <p>PG&E also began development of a robust communication plan for the the CAPP credit and will leverage this opportunity to highlight additional financial assistance solutions.</p>
SCE	<p>Resumed CARE recertification on July 1, 2021. CARE High Usage Verification (HU PEV) resumed in August 2021 at reduced levels to monitor functionality in new operating system. SCE to resume all PEV activity in 2022.</p>	<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 but looking to update Virtual procedures. Conducted COVID safety and exposure reporting refresher training. 	<p>Increase Medical Baseline enrollment based on patient enrollments relative to 2019 levels by:</p> <p>7% percent in 2021, 8% percent in 2022, 9% percent in 2023, per E-5169.</p>	<p>Communication was changed on sce.com/care to the messaging "Our assistance programs are still here for you". SCE increased efforts with Community Based Organizations (CBOs) to boost marketing efforts towards hard to reach to underserved communities with newsletters and quarterly meetings.</p>

COVID-19/Transition Plan Q4 Update (continued)

	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. Contractors have seen fluctuation in customers' willingness to participate over the past quarter. SDG&E's largest contractor has reported workforce issues, with employees out due to quarantining issues, which impacts the steadiness of meeting program enrollment goals.	Resumed medical practitioner certification requirement for new enrollments and recertification requests on July 1, 2021.	Ongoing updates to sdge.com/covid , bill messages, social media posts and monthly CARE-eligible communications. Targeted emails to residential customers who were auto-enrolled in payment plans. CBO engagement promoting available assistance programs & payment plans. ERAP outbound calls, follow-up emails, and enrollment events.
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. Increase MBL participation in 2021 – 2023 by 3% each year, relative to 2018 enrollment levels.	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.



Public Safety Power Shutoffs (PSPS)

In 2021, we continued to evolve and improve to keep our customers safe and reduce the impacts of PSPS outages.

Through key advancements in weather modeling and the use of artificial intelligence and machine learning models, PSPS outages were more precise than ever before.

OUTAGE DETAILS	JAN 19-21	AUG 17-19	SEPT 20-21	OCT 11-12	OCT 14-16
CUSTOMERS IMPACTED	5,099	48,155	2,968	23,504	666
COUNTIES IN SCOPE	7	13	8	23	1
TRIBES IN SCOPE	0	3	1	4	0
PEAK WIND GUSTS	83 MPH	56 MPH	48 MPH	102 MPH	47 MPH

2021 Improvements

compared to 2020



17%
fewer outages



88%
fewer customers impacted on average per outage

Data is approximate.

Outage details as of 9/2/2021 and subject to change.

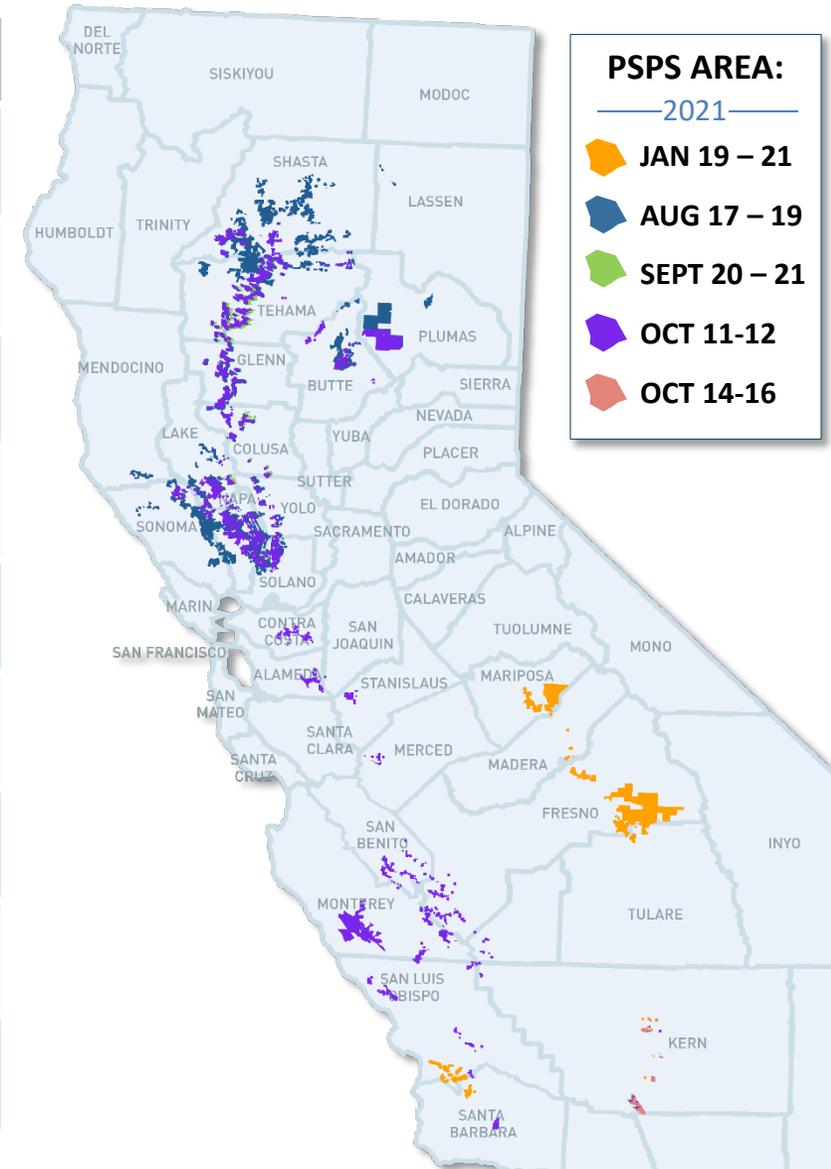


2021 PSPS Outages Systemwide

To view post de-energization reports, visit

pge.com/pspsreports

OUTAGE DETAILS		JAN 19 – 21	AUG 17 – 19	SEPT 20-21	OCT 11-12	OCT 14-16
	CUSTOMERS IMPACTED	5,099	48,155	2,968	23,504	666
	COUNTIES IN SCOPE	7	13	8	23	1
	TRIBES IN SCOPE	0	3	1	4	0
	COMMUNITY RESOURCE CENTERS OPEN	7†	34	9	24	11
	PEAK WIND GUSTS	83 MPH	56 MPH	48 MPH	102 MPH	47 MPH
	DAMAGE/HAZARDS	423	10	0	8	1
	TOTAL AVG. OUTAGE DURATION	83 HRS	29 HRS	13 HRS	28 HRS	16 HRS
	AVG. RESTORATION TIME	62 HRS	9 HRS	3 HRS	9 HRS	4 HRS
	PERCENT OF CUSTOMERS REMOVED FROM SCOPE DUE TO PSPS MITIGATIONS	82%	69%	86%	83%	85%



†Does not include resource centers activated for wind event



2021 Resource Providers

To view post de-energization reports, visit

pge.com/pspsreports

Supporting AFN customers through our partnerships with Community-Based Organizations:



CFILC (Disability Disaster Access and Resources Program)	16 centers serving 48 counties
Meals on Wheels	21 organizations serving 19 counties
Food Banks	23 organizations serving 37 counties
Portable Battery Program Providers	6 providers serving 42 counties
In-Language and Additional Partnerships	12 services serving 21 counties

DDAR PROGRAM	Portable Batteries Delivered	Hotel Stays	Food Vouchers	Transportation	Fuel Card for Generator
2021 Totals	1,194	267	348	2	36

PORTABLE BATTERY PROGRAM	Portable Batteries Delivered	Total Number of Customers Offered
Inception to Date Total	10,325	> 22,000

CBO RESOURCE PARTNERS	JAN 19 – 21	AUG 17 – 19	SEPT 20-21	OCT 11-12	OCT 14-16
FOOD BANK	525	404	87	549	0
MEALS ON WHEELS	7	100	0	107	2
OTHER	0	10	0	0	1

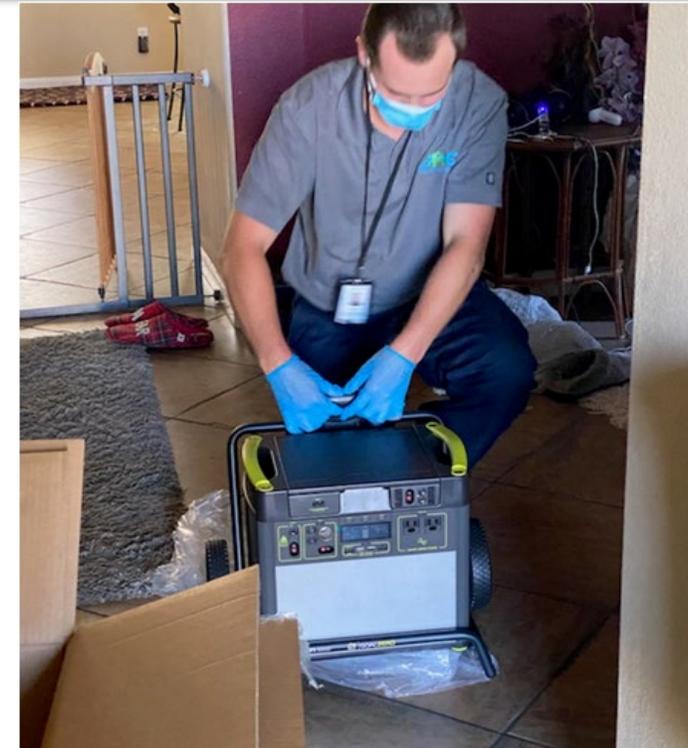
Critical Care Backup Battery Program

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>

PROGRAM SUMMARY THROUGH NOVEMBER 2021

2021 Enrollments	6,003
2021 Battery Deployments	5,750
2020-YTD Enrollments	6,794
2020-YTD Deployments	6,470

- ❖ 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.



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



Post-Moratorium Extension

Continued Customer Support



- Continuing to update socalgas.com/Coronavirus as new programs and payment assistance become available.
- Clear messaging for residential and small business customers based on their account standing.
- Added COVID-19 Relief Payment Plan information and links to dedicated payment plan web pages for customers to learn more about payment plan details, eligibility, and frequently asked questions.



CORONAVIRUS (COVID-19) OUR SUPPORT & RESPONSE

Upcoming Changes to Your Natural Gas Service

The California Public Utilities Commission (CPUC) moratorium on utility disconnections ended on September 30, 2021. SoCalGas is offering various payment options and assistance programs to support customers in paying their bills to help prevent potential disconnection.

What Does This Mean for Residential Customers?

- If you do not have a past due balance on your account, you are not affected and there is no change to your natural gas service.
- If you have a past due balance on your account, [please pay your past due balance](#), enroll in a payment plan, or see if you qualify for our [customer assistance programs](#). If your balance is past due by more than 60 days, you'll be automatically enrolled in the COVID-19 Relief Payment Plan. See below for details.

What Does This Mean for Business Customers?

- If you do not have a past due balance on your account, you are not affected and there is no change to your natural gas service.
- If you own a business and have a past due balance on your account, please [pay your past due balance](#) or call 1-800-427-2000 to inquire about payment plan options. If your balance is past due by more than 60 days, you'll be automatically enrolled in the COVID-19 Relief Payment Plan. See below for details.

The COVID-19 Relief Payment Plan

To help customers manage and pay bills, the CPUC has mandated that all residential and small business customers with arrears older than 60 days be automatically enrolled in a new payment plan known as the COVID-19 Relief Payment Plan.

SoCalGas started automatically enrolling eligible residential and small business customers in this new COVID-19 Relief Payment Plan on September 30, 2021. If enrolled, customers will receive a confirmation letter in the mail with payment plan details.

Residential Customers

- [Learn more](#) about COVID-19 Relief Payment Plan details, eligibility, and frequently asked questions.

Small Business Customers

- [Learn more](#) about COVID-19 Relief Payment Plan details, eligibility, and frequently asked questions.

Glad to be of service.®



COVID-19 and the State of Disconnections and AMPs

Low Income Oversight Board Meeting
WebEx
December 15, 2021

State of Disconnections Status and AMPs

Arrearage Management Plan (AMP)*

Number of customers enrolled: 96,981

Total arrearages: \$164M

Total amount forgiven: \$33M

*Data as of 10.31.21

Disconnections

Number of disconnections: Zero*

Resumption of residential credit collection efforts expected to begin Q2 of 2022

*As of 11.30.21

SCE Disconnection Status and AMP

- Disconnections
 - SCE will not have disconnections in 2021.
 - Because of ongoing efforts with auto-enroll payment plans and the California Arrearage Payment Program (CAPP), SCE does not anticipate resuming disconnections until Q2 of 2022.
- Arrearage Management Plan
 - As of October 31, 2021, SCE has enrolled 25,894 customers into the AMP program

SDG&E State of Disconnections and AMPs

- Residential disconnections have not begun and will not in 2021. SDG&E is still evaluating when Credit Action will begin for Residential customers but has no set date.
- SDG&E has approximately 9,500 customers enrolled in AMP.

State of Disconnections and Arrearage Management Plans (AMPs)



- Disconnections
 - SoCalGas has not disconnected any residential customers and will not disconnect in 2021.
 - SoCalGas does not anticipate disconnections until tentatively Q1 of 2022.
- Arrearage Management Plan
 - As of October 31st, 2021, SoCalGas has enrolled 44,201 customers in the AMP program