

Low Income Oversight Board Energy Division Update

Presented by Kapil Kulkarni, Energy Division Staff
December 15, 2021



California Public
Utilities Commission

Agenda

- Large IOUs ESA/CARE/FERA program cycle
 - Advice Letters
 - Working Groups
 - MFWB program solicitation
- Summer Reliability overview
- Low Income Needs Assessment

ESA/CARE/FERA program cycle – recent activities

- On September 1, the IOUs jointly submitted a compliance filing to align customer segments, treatments tiers, and measures.
 - Energy Division staff is reviewing protests and replies, and will dispose of the advice letter filing.
- In late November, the IOUs also submitted their deeper energy savings pilot program implementation plan advice letters for CPUC approval.
 - PG&E and SDG&E have separate solicitations for full third-party design and implementation.
 - SCE and SCG are planning a solicitation for an IOU-designed, contractor implemented joint program.
 - Per decision, these programs will launch by Q3 2022.

ESA/CARE/FERA program cycle – ongoing activities

- **Working Groups**

- The IOUs solicited for and formed the main **ESA Working Group** to discuss ESA-related activities. Kick off meeting to be held by January.
- **Universal Application System (UAS) Working Group** is a subset of the ESA Working Group and held a kick off meeting on December 7. The UAS WG will meet regularly to develop recommendations in order to meet July 2022 deadline.
- **ESA-CARE Study Working Group** has also been formed in order to manage the IOUs' non-statutory ESA and CARE studies during the program cycle.
 - Members include CalPA, CEC, CA Dept of Housing and Community Development (HCD), TURN, CHOC, and American Eco Services.

ESA/CARE/FERA program cycle – ongoing activities

- **Multifamily Whole Building (MFWB) program solicitation**
 - Procurement Review Group (PRG)
 - The IOUs have formed the PRG and are meeting monthly to review the solicitation processes for the MFWB program.
 - The IOUs have also selected the **Independent Evaluator** to advise the PRG and produce monthly and final reporting on the process.
 - The PRG has finalized the following governance and guidance documents:
 - **Charter** – includes roles and responsibilities
 - **Guidelines** – intended to streamline feedback on the solicitation process to the IOUs, including a checklist to show how the feedback was incorporated

ESA/CARE/FERA program cycle – ongoing activities

- **Multifamily Whole Building (MFWB) program solicitation**
 - Procurement Review Group (PRG)
 - The PRG consists of the following participants:
 - PG&E and SDG&E – Lead IOUs, as well SCE and SCG
 - CPUC – Energy Division, and California Public Advocates
 - Non-financially interested parties:
 - Earthjustice
 - National Consumer Law Center
 - Natural Resources Defense Council
 - Small Business Utility Advocates
 - StopWaste

ESA/CARE/FERA program cycle – upcoming activities

- **Multifamily Whole Building (MFWB) program solicitation – timeline**

| Joint IOU Multifamily Whole Building Solicitation Schedule | | | | | | | | | | | | | | | | | | | | | |
|---|------------------------------|--|------|----------|-----|------|-----|-----|-----|--------------------------------|-----|-----|-----|-----|------|----------------------|-----|-----|-------------------|-----|--|
| Schedule as of 10/20/2021 (Schedule may change at IOU's discretion) | | | | | | | | | | | | | | | | | | | | | |
| IOU | Year | | 2021 | | | 2022 | | | | | | | | | 2023 | | | | | | |
| | Quarter | | Q4 | | | Q1 | | | Q2 | | | Q3 | | | Q4 | | | Q1 | | | |
| | Month | | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | |
| PG&E and SDG&E | Energy Savings Assistance | ESA Multifamily Whole Building (MFWB) Program | | RFP Prep | | | RFP | | | Interview/Contract Negotiation | | | | | | Execute Contracts | | | Program Launch | | |

Next steps

- Ongoing working groups and PRG meetings.
- Solicitation process for potential bidders
 - IOUs hosting multiple bidder matchmaking events, supplier diversity events, and bidders' workshops
 - Upcoming solicitations for various ESA program components
 - More information available at the IOUs' solicitations websites, and www.caeecc.org
- All proceeding documents, including monthly reports, will be available in the docket card for A.19-11-003 at <https://www.cpuc.ca.gov/proceedings-and-rulemaking> as well as through the service list.

Questions?

Summer Reliability overview

- Summer Reliability Rulemaking – R.20-11-003
 - Decision D.21-12-015 approving various actions, including:
 - Smart Thermostat rebate program – up to \$75 per device
 - Emergency Load Reduction Program (ELRP) - behavioral demand response incentive program with CARE/FERA customer auto-enrollment
- Main EE Proceeding – R.13-11-005
 - Decision D.21-12-011 approving various actions, including \$185 million in additional funding for programs that produce demand savings
- Documents are available on the docket card on the CPUC website

2022 Low Income Needs Assessment

Current Activity

- Conducting phone surveys using finalized interview guide

Upcoming Activity

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

2022 Low Income Needs Assessment

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

Questions?

Thank you!

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