

Low Income Oversight Board

3rd Quarterly Meeting

September 29, 2022

9:30 AM – 3:30 PM



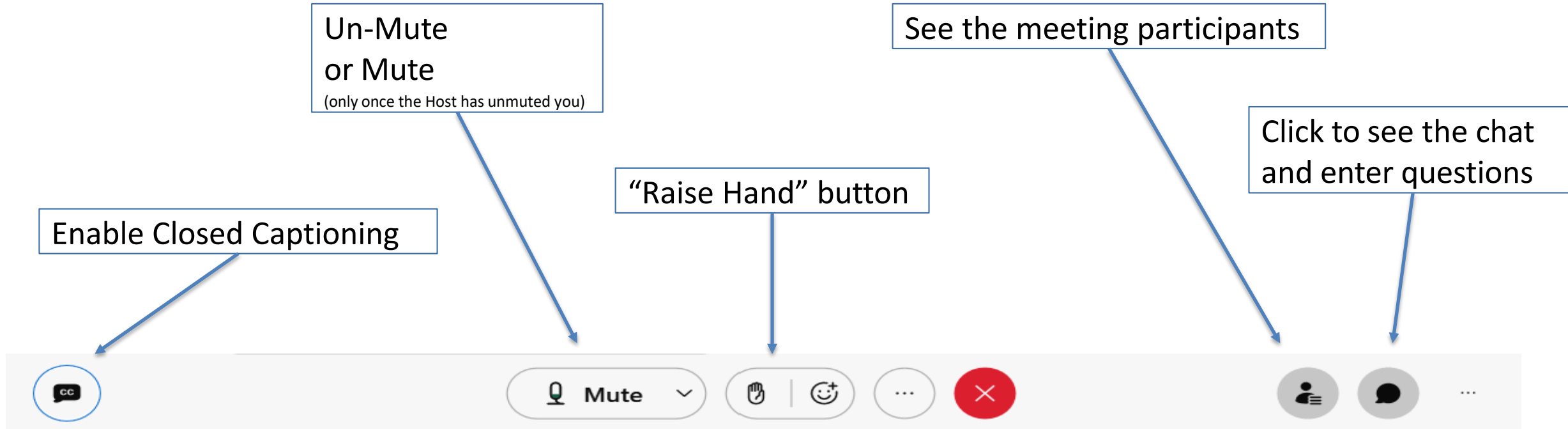
California Public
Utilities Commission

Meeting Information

- All attendees will be **automatically muted** upon entry. Only the Host can unmute attendees and will unmute those who request to speak via the “Raise Hand” Feature.
- Members of the public or community based organizations will be able to provide comment to the Low Income Oversight Board during **Agenda Item 3**, or if requested by the Board.
- The chat box feature should not be used for formal comment. Attendees can use the chat box to message the host to ask general questions, note technical issues, or request to speak.
- This board meeting is a formal CPUC event and will be **recorded** for reference purposes.
- The recording will be available at <https://www.adminmonitor.com/ca/cpuc>



Webex Webinar Participant Guide



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

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

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

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

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

Closed Captioning in English provided by Webex:



Closed Captioning in Spanish:

<https://www.adminmonitor.com/ca/cpuc/other/20220929/>

Low-Income Oversight Board

Board Member Introductions

September 29, 2022



California Public
Utilities Commission

LIOB Board Introductions



Genevieve Shiroma
CPUC Commissioner



Benito Delgado-Olson
Chair



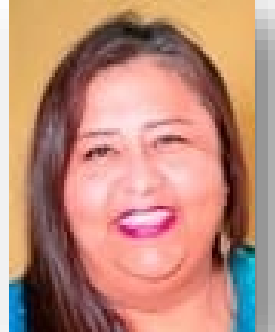
Maria Stamas
Vice Chair/Public



Robert Castaneda
Public



Lisa Castilone
Public



Lourdes Medina
Public



Paul Irwin
Public



Patricia Watts
**Weatherization
Contractor**



Jason Wimbley
CSD



John Tang
Water



Valarie Hernandez
Electric/Gas

Item 2: Approval of the July 21, 2022 2nd Quarterly Meeting Minutes

9:45 – 9:55 AM



**California Public
Utilities Commission**

Item 3: Public Comment

9:55 – 10:10 AM

Please use the “Raise Hand” feature in Webex window to request to speak



Public comment is intended to provide an opportunity for members of the public who wish to address the board on any topic. Members of the board are not allowed to take any formal action on an item not on the agenda. If possible, it is requested that public comment be limited to 2 minutes per speaker

Item 4: Comment from Community Based Organizations & Special Presentations

10:10 – 10:40 AM



California Public
Utilities Commission

Department of Developmental Services

September 29, 2022

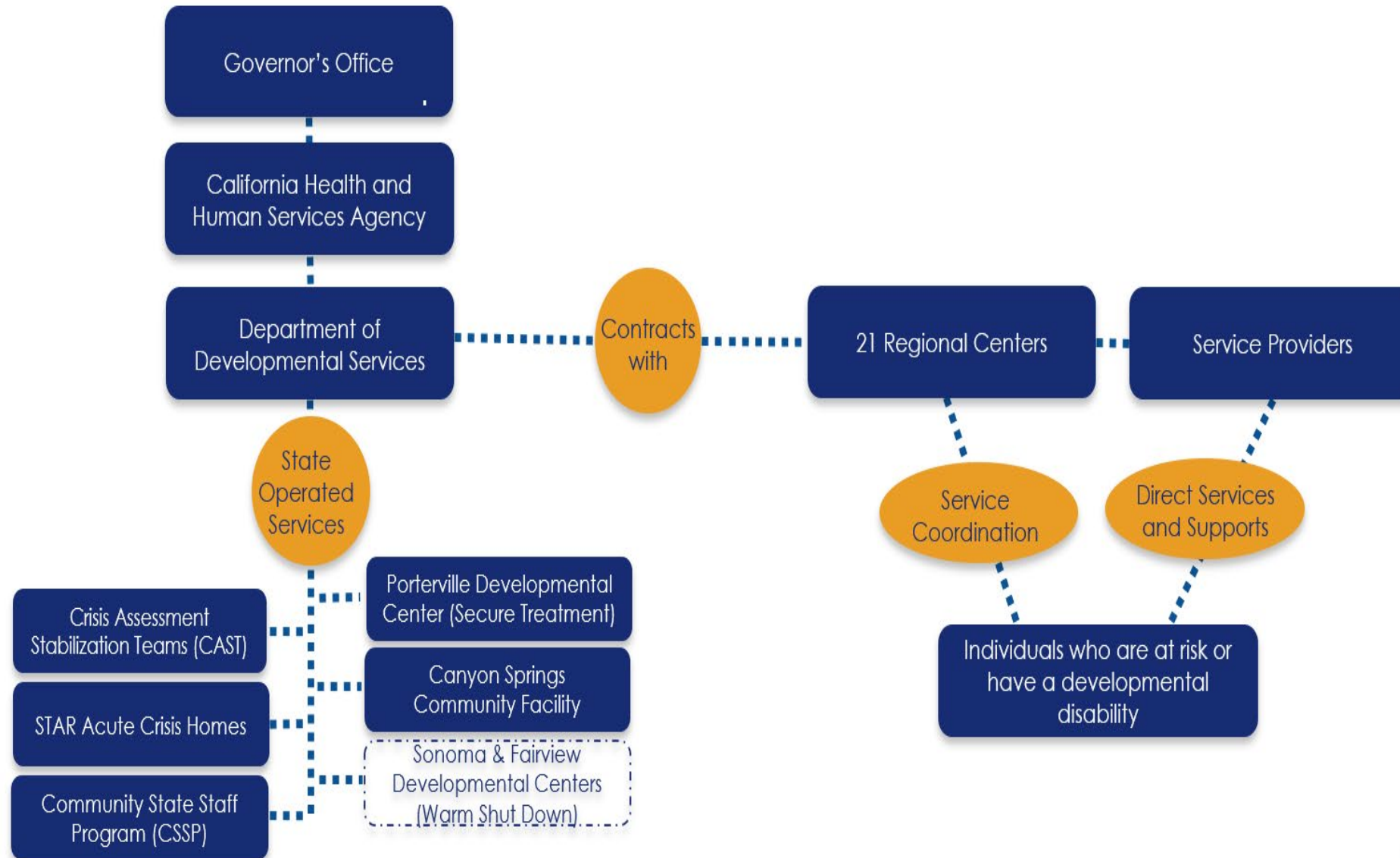
Introduction and Objectives

- Provide a high-level overview of the Department and my role
- Highlight our 2021/2022 Initiatives
- Share learning moments we have experienced
- Research examples
- What more can we do

CALIFORNIA DEPARTMENT OF DEVELOPMENTAL SERVICES (DDS)

- DDS serves 385,000 Californians who have an intellectual/developmental disability (I/DD)
- Services and supports are offered through 21 contracted, private, non-profit community agencies, known as regional centers (RCs)
- State Operated Services
 - ▶ Secure Treatment Program – Forensic I/DD
 - ▶ Community Residential (ICF/DD) – Step Down
 - ▶ Three Mobile Crisis Response Teams (CAST)
 - ▶ Four Community-Based Acute Crisis Homes (STAR Homes)

System Organization



Roles in the Developmental Services System

DDS

- Leadership & policy direction
- Oversee coordination & accountability for delivery of services
- Operate State-Operated Services
- Contract with 21 California regional centers

Regional Centers

- Assessment & eligibility
- Service coordination
- Services as directed by the Individual Program Plan (IPP)
- Oversight of services/providers
- Work with individuals & families
- Implement State & Federal policies

Map of Regional Centers by County



21/22 Initiatives

- ▶ Emergency Go – Kits
- ▶ Portable batteries
- ▶ Emergency Preparedness Materials – Residential homes
- ▶ RC Emergency Coordinators

Thank you and Closing



- ▶ Tamara Rodriguez,
Emergency Preparedness
& Response Officer
- ▶ 916-718-1942 Cell

Break

Item 5: Joint IOU Medical Baseline Program (MBL) Overview

Low Income Oversight Board 3rd Quarterly Meeting Thursday,
September 29, 2022



Medical Baseline (MBL) Program



The Medical Baseline (MBL) Program is an assistance program **for residential customers who have extra energy needs due to qualifying conditions.**



The MBL Program is **NOT** an income eligibility program.



Customers enrolled in the MBL program receive an **additional allotment of electricity and/or gas every month at the lowest price available on their rate.**



Patients must be a **full-time resident in the home.**



Enrollment in the MBL program lets the utility know that someone in the home relies on medical equipment and **may be vulnerable during power outages.**



MBL: Marketing, Education, and Outreach

Marketing												
	MBL Acquisition Email	MBL Acquisition Direct Mail	Wildfire Preparedness (Email/Direct Mail)	Bill Inserts/ Onsert	Master Meter Tenant Direct Mail	Targeted Digital Campaign	Targeted Mass Market Campaign	Univision TV Ads (Spanish)	Outbound Call Campaign	IHSS Provider Campaign	Medical Device Retailer Campaign	Cross Promotion w/other Assistance Programs
PG&E	X	X	X	X	X	X	X	X	X	X		X
SDG&E	X		X	X						X	X	X
SCE	X		X	X	X	X	X			X		X
SCG	X	X		X		X	X			X		X

Education/Engagement						
	Content in Multiple Language on Website	Outreach Brochures	MBL Video	MBL Factsheet	Wildfire Preparedness Brochure	MBL Healthcare Flyer and Tabletop
PG&E	X	X	X	X	X	X
SDG&E	X	X		X		
SCE	X	X	X	X	X	
SCG	X	X		X		

Outreach							
	Wildfire Webinars	CBO/Faith Based Partnerships	CARE Contractors Training	Tribal Community Engagement	Healthcare Professionals/ IHSS Providers Training	Targeted Sponsorships & Partnerships	Community Events
PG&E	X	X	X	X	X	X	X
SDG&E	X	X		X	X	X	X
SCE	X	X	X	X	X	X	X
SCG		X		X	X	X	X

MBL: Benefits

1. Additional monthly allotment of energy

In the MBL program, customers on **eligible rates** receive additional

- 16.5 kilowatt-hours (kwh) of electricity/day and/or
- 0.822 therms of gas/day

at their baseline (lowest) price depending on their energy needs as verified by a medical practitioner during their MBL certification.

2. Extra notifications in advance of a Public Safety Power Shutoff (PSPS)

PSPS notifications may be sent via automated calls, texts and emails (available in sixteen languages) based on customers' contact preferences, and according to the following schedule:

2 days before power is turned off (WATCH)	1 day before power is turned off (WATCH)	Just before power is turned off (WARNING)	During the PSPS	Once power is restored
---	--	---	---------------------------	----------------------------------

MBL customers receive extra notifications as part of this outreach, which may include **additional phone calls or a door-bell ring** to ensure they're aware and can prepare to stay safe.

It is important that MBL customers **acknowledge receipt of a notification** by answering the phone and speaking or replying to the text message.

*It is important to note that approval of the MBL program does not prevent customers from being disconnected for non-payment of bills or being impacted by power outages.

MBL: Eligibility

- Below are a few *examples* of qualifying conditions or devices that meet eligibility for the program. More information can be found on the utility's dedicated websites.
- **We encourage customers to NOT disqualify themselves if they do not see their medical condition or device listed on the utilities' websites.**
- We recognize that new devices and technologies are being introduced regularly and we evaluate every application and condition/device, for eligibility.

Examples of Qualifying Medical Conditions

- Paraplegic, hemiplegic or quadriplegic condition
- Multiple sclerosis with additional heating and/or cooling needs
- Scleroderma with additional heating needs
- Life-threatening illness or compromised immune system, and additional heating and/or cooling are needed to sustain life or prevent medical deterioration
- Asthma and/or sleep apnea

Examples of Qualifying Medical/Mobility Devices

- Motorized wheelchair/scooter
- CPAP or other breathing machines
- Respirator (all types)
- Hemodialysis machine

Note: Qualifying medical devices include any medical device used to sustain life and require additional energy. Devices are for home-use only. Devices used for therapy generally do not qualify.

MBL: Enrollment



- Pacific Gas & Electric (PG&E), San Diego Gas & Electric (SDG&E), Southern California Edison (SCE) and SoCalGas make applying for the Medical Baseline Program as convenient as possible by providing the following options to their customers:
 1. Applying online on the dedicated Medical Baseline websites, or
 2. Printing an application from the utilities' webpages and mailing it in, or
 3. Calling the utility Customer Service numbers to request an application be mailed
- Caretakers, family members or agents providing support to qualifying individuals can also assist their clients in applying for the program.
- MBL enrollment requires the MBL application form to be completed and signed by a Qualified Medical Practitioner*.
- MBL Application forms are processed within 7-30 days of receipt. Customers would start seeing additional MBL energy allotments on their energy statements within 1-2 billing cycles.

* A qualified medical practitioner is a licensed physician, nurse practitioner, physician assistant or person licensed pursuant to the Osteopathic Initiative Act

MBL: Recertification & Self-Certification

- While certifying their patient for MBL Program the medical practitioner must indicate whether the patient has a **permanent condition**, or if not, the **approximate duration of medical condition**

☐ No. of Years_____ or ☐ Permanently

- This determines how often the customer will need to re-certify for continued eligibility

Non-Permanent Medical Conditions	
Every year	The customer must self-certify for continued eligibility
Every two Years	The customer must recertify, meaning they need to reapply and obtain a qualified medical practitioner's certification
Permanent Medical Conditions	
Every two years	The customer must self-certify for continued eligibility

Joint IOU Proposal to Modify MBL Renewal Process

Background: MBL program was last revised in 2002 pursuant to CPUC decision D.02-04-026 (Ordering Paragraph 22). This decision also included the following modifications to the MBL recertification and self-certification processes:

1. *“Customers certified as having a permanent disability will need to self-certify their eligibility every two years, in lieu of obtaining a physician’s signature or authorization, to (at a minimum) ensure their continued residence at the service address, and*
2. *Those customers not having a permanent disability will need to self-certify each year, and will need a doctor’s certification every two years”*

Modification Proposal: On August 2, 2022, the IOUs filed a joint Petition for Modification* to modify Medical Baseline (MBL) renewal process.

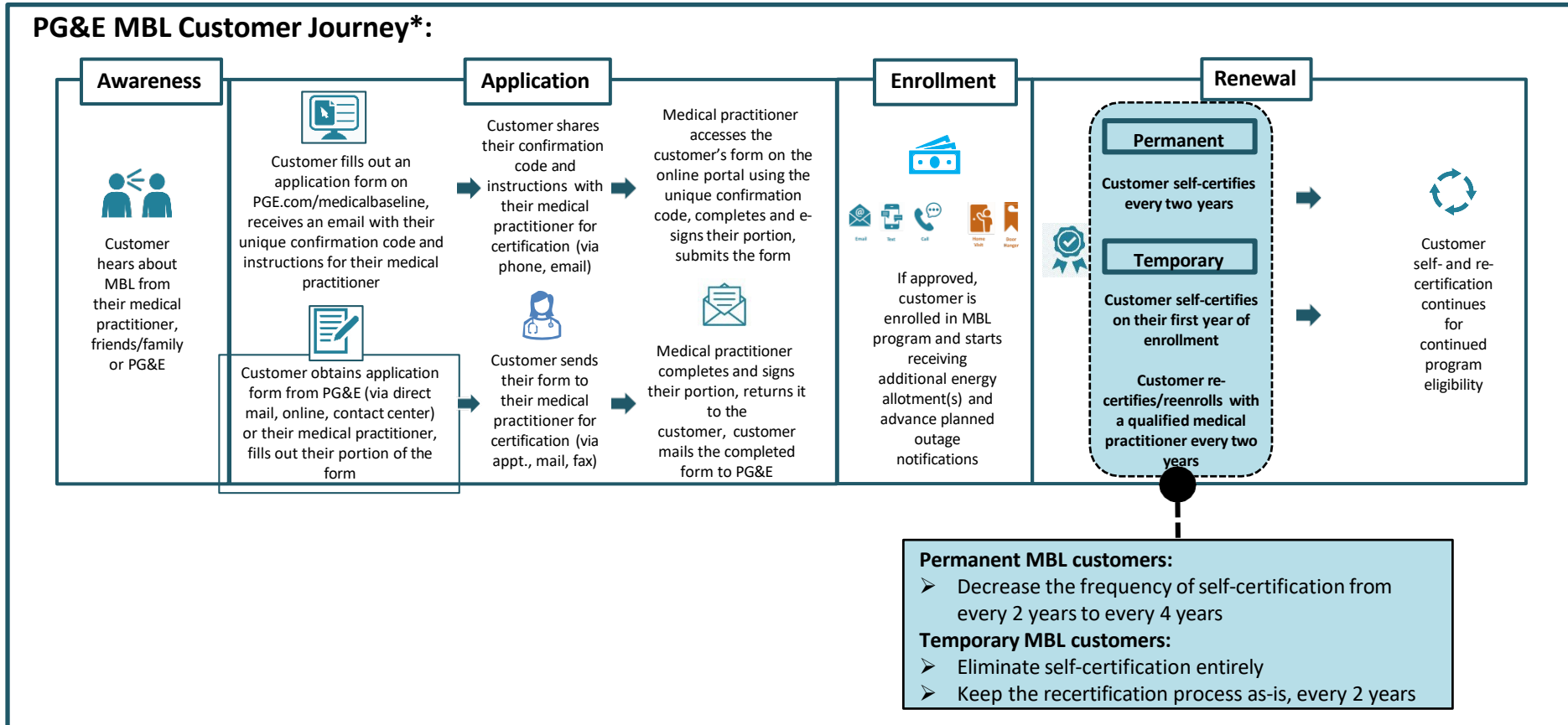
	D.02-04-026 Requirement	Joint IOU Proposal
Permanent Condition	Self-certification every two years	Self-certification every four years
Non-Permanent Condition	Self-certify annually Qualified medical practitioner certification every two years	Eliminate self-certification Retain qualified medical practitioner certification every two years

Ultimately, the Joint IOUs proposal is justified because it:

- Aligns with the shared goals of the Legislature, Commission, stakeholders, and IOUs to increase enrollments in the MBL program; and
- Supports MBL customer retention and delivery of important benefits, such as specific outreach and notifications during emergencies and additional outreach and support to avoid potential disconnection

*JOINT PETITION OF PACIFIC GAS AND ELECTRIC COMPANY (U 39-M) SAN DIEGO GAS AND ELECTRIC COMPANY (U 902-E), SOUTHERN CALIFORNIA EDISON COMPANY (U 338-E) AND SOUTHERN CALIFORNIA GAS COMPANY (U 904-G) FOR MODIFICATION OF DECISION 02-04-026

Joint PFM Aims to Simplify MBL Renewal Process and Cadence for All Customers



*The journey map presented here represents the PG&E MBL customer journey. Some program aspects related to awareness and application may slightly differ than the other IOUs

MBL: More Information



Visit PG&E MBL webpage to learn more about the program and access application forms:

pge.com/medicalbaseline

- **Apply online.** Upon form submission, you will receive an email with a confirmation number and instructions for your medical practitioner.
- Ask your medical provider to complete their portion of the application and share with them the instructions and your confirmation number in the email you received.

Or

- Download and complete Part 1 of the application form.
- Ask your medical provider to complete Part 2 of the application.
- Send in the completed application form:

Mail: PG&E Credit and Records
Center Medical Baseline

P.O. Box 8329
Stockton, CA
95208



Visit SDGE MBL webpage to learn more about the program and access application forms:

sdge.com/medical

- Download and complete Part 1 of the application form.
- Ask your medical provider to complete Part 2 of the application.
- Send in the completed application form:

Mail: SDGE
Medical Baseline Allowance
Program Manager

P.O. Box 129831
San Diego, CA
92112-9831

Email:
medicalbaseline@sdge.com



Visit SCE MBL webpage to learn more about the program and access application forms:

sce.com/medicalbaseline

- **Apply online** and provide the email of your medical provider. Your medical provider will receive an email requesting their signature. Please alert them that they will be receiving an email from SCE.

Or

- Download and complete Part 1 of the application form.
- Ask your medical provider to complete Part 2 of the application.
- Send in the completed application form:

Mail: SCE Medical Baseline
Department

P.O. Box 9527
Azusa, CA 91702



Visit SoCalGas MBL webpage to learn more about the program and access application forms:

socalgas.com/medical

- Download and complete Part 1 of the application form.
- Ask your medical provider to complete Part 2 of the application.
- Send in the completed application form:

Mail: SoCalGas
Medical Baseline
Allowance Program
M. L. GT19A1
P.O. Box 513249
Los Angeles, CA
90051-1249
Fax: 213-244-4665
Email:
MedicalBaselineProgram@socalgas.com



Item 6: Joint IOUs Program Highlights

Low Income Oversight Board Meeting

September 29, 2022

WebEx

Program Update – as of 7/31/2022



ESA

Homes treated: 41,199
Annual Energy Savings:

- 14,876,914 kWh
- 678,604 therms

% Expenditure: 42%

CARE

Enrollment: 1,454,447
Enrollment Rate: 104%
Discounts: \$537,893,075
% Adm. Expenditure: 45%

FERA

Enrollment: 36,643
Enrollment Rate: 21%
Discounts: \$9,338,658
% Adm. Expenditure: 57%

Additional Highlights

- PG&E exceeded its annual ESA energy savings target for gas (108%) and is on track to meet its targets for annual electricity savings (at 99% of target) and homes treated (at 69% of target) before the end of 2022
- While PG&E continues to hold its CARE enrollment rate at 104% of eligible households, its FERA enrollment is lagging at 21% (vs its enrollment goal of 40%) despite its aggressive marketing efforts to reach FERA-eligible households
- No disconnection took place through July. There are ~166k customers enrolled in AMP, with 2,569 customers completed the program since the program started in Feb 2021, amount forgiven totaled \$98M (as of 9/1/2022)
- PG&E launched its tribal grant program in June. The availability of the grant program was shared with all tribes within PG&E service territory. So far, PG&E has received one application. PG&E is evaluating ways to improve participation in 2023

Program Overview – as of 7/31/22

CARE

- Customers Enrolled: 1,193,117
- Enrollment Rate: 93%
- Newly Enrolled Customers: 177,780

FERA

- Customers Enrolled: 24,791
- Enrollment Rate: 11%
- Newly Enrolled Customers: 4,543

ESA

- Homes Treated: 33,127
- Energy Savings: 16.6 GWh
- Unspent Funds Remaining: \$21.69

MF CAM

- Properties Treated: 37
- Current Projects: 5
- SCE plans to continue running MF CAM until the Southern Multifamily Whole Building (MFWB) Program is open to participation in 2023.

Additional Highlights

Tribal

- SCE tribal liaisons have begun engaging tribal leaders to offer mini grants. Scheduled initial one-on-one meetings with 3 tribes.

Disconnections/AMP

- No Disconnections for 2022. Resumption of residential credit collection efforts expected to begin Q3 2022.
- Conducted AMP Net Energy Metering (NEM) outreach and mailed letters to AMP customers impacted by delayed billing



Program Overview – as of 7/31/22

CARE

- Customers Enrolled: 350,017
- Enrollment Rate: 121%
- Newly Enrolled Customers: 44,357

ESA

- Homes Treated: 4,478
- kWh Saved: 581,114
- Therms Saved: 11,133

MF CAM

- # of Properties: 8
- kWh Saved: 54,383
- Therms Saved: 1,738

FERA

- Customers Enrolled: 12,108
- Enrollment Rate: 28%
- Newly Enrolled Customers: 1,397

Additional Highlights

Tribal: Tribes completed ESA Meet & Confer - 12

Disconnections/AMP:

- Disconnections - Zero
- AMP - Number of customers enrolled: 13,656
- AMP - Total amount forgiven: \$9.3M

Program Overview – as of 7/31/22

CARE

- Customers Enrolled: 1,782,811
- Enrollment Rate: 111%
- Newly Enrolled Customers: 187,529

ESA

- Homes Treated: 49,665
- Therms Saved: 362,535
- Unspent Funds Remaining: \$67.52 M

MF CAM

- Central Boiler Projects: 13
- Impact: 16 bldgs., 1,212 units, 3,000+ tenants
- Therms Saved: 73,547

Additional Highlights

Tribal

- Enhancing outreach strategy to help navigate and increase engagement within tribal communities, including non-federally recognized.
- Onboarding dedicated consultant to strengthen Tribal relationships.

Disconnections/AMP

- 104,828 customers enrolled in AMP (as of 9/13/22). Disconnections to resume in Q2 2023.



Joint IOUs Energy Savings Assistance Program Solicitations & Contractor Funding

Low Income Oversight Board Meeting

September 29, 2022

WebEx

ESA Programs Joint IOUs Solicitations Schedule

- A Joint IOU Energy Savings Assistance (ESA) Program Solicitation Schedule has been developed and posted to the California Energy Efficiency Coordinating Committee (CAEECC) website and the ESA Program Solicitation landing pages of each IOU.

CAEECC-ESA Program: www.caecc.org/energy-savings-assist-programs

SCE: <https://www.sce.com/partners/ESA-solicitations>

SoCalGas: <https://www.socalgas.com/regulatory/energy-savings-assistance-program>

PG&E: [Solicitations for PG&E Energy Savings Assistance Programs](#)

SDG&E: <https://www.sdge.com/energy-savings-assistance-programs-solicitations>

- The schedule includes key milestones across all IOUs ESA Program solicitations.
- Please use the links to check for monthly updates to help facilitate transparency and assist with bidder workload management.
- The Joint IOUs Solicitations Schedule is updated/posted on or by the 1st of every month. Any date changes are noted at the bottom of the schedule.

Energy Savings Revolution Program Solicitation Schedule ALL DATES ARE SUBJECT TO CHANGE**		September				October				November				December					
		9/5	9/12	9/19	9/26	10/3	10/10	10/17	10/24	10/31	11/7	11/14	11/21	11/28	12/5	12/12	12/19	12/26	
		Regulatory Requirements Ordering Paragraphs of CPUC Decisions (D-15-08-RS)***																	
Joint IOD Events																			
SCE	Main ESR (Basic/Plan) Program	Central Negotiations								Central Records and Incentives/Program Launch		Program Ramp Up							
	ESR Equipment Vendors		Central Negotiations								Central Records and Incentives/Program Launch		Program Ramp Up						
	ESR Inspectors	Sealing	Central Negotiations						Central Records and Incentives/Program Launch		Program Ramp Up								
	Building Electrification Pilot	Program Ramp Up												Operate Participation (Testative)					
	Clean Energy Home Pilot		Central Records and Incentives/Program Launch		Program Ramp Up												Operate Participation (Testative)		
	ESR Pilot/Drop Implementation Pilot (Joint SCE/SCQ)†	Program Ramp Up								Operate Participation + 10/3									
	ESR Pilot/Drop Evaluation Pilot (Joint SCE/SCQ)†	Central Records and Incentives/Program Launch		Program Ramp Up						Operate Participation + 10/3									
	Building Electrification and Clean Energy Home Pilot Evaluation					Central Records and Incentives/Program Launch		Program Ramp Up						Operate Participation (Testative End 04/2022)					
	Interactive Energy Education Pilot: This Initiative is preliminary and subject to change based on future program needs and timeline.	Proposal Release, Bidders Conference and RFP Proposal Due Date (TBD)		BID Evaluation and Sealing (TBD)		Central Negotiations (TBD)				Central Record/Incentives (TBD)		Program Ramp Up (TBD)							
ESR Overview Main ESR is a multi-year program of energy efficiency measures for commercial and residential customers. The program is designed to reduce energy consumption and greenhouse gas emissions by providing incentives for energy efficiency upgrades. The program is managed by SCE and SCQ, with implementation by various contractors and service providers. The program is subject to change based on future program needs and timeline.		Goodwill/Marketplace (\$200)						Goodwill/Marketplace (\$200)		40-Dropouts (\$200)									
SoCalGas	Main ESR (Basic/Plan) Program (Idaho only - single-family in-house natural gas)	Central Negotiations								Central Records and Incentives/Program Launch									
	Customer Experience Technology Platform and Customer Outlier Model	Central Negotiations/Bidder Negotiations; Central Package Prep				Central Negotiations						Central Records and Incentives							
PG&E††	Main ESR (Basic/Plan) Program	Program Transition Period																	
	Multi-Family/Whole-Building Program	None											Central Records/Incentives†		RI Submittals 10/30/22		ED Review of 2		
	Statewide Multi-Family Central Portal	IT Development																	
	Bulk Materials	Pilot	Central Negotiations				Central Records and Incentives/Program Launch		Program Ramp Up										
	ESR Pilot Plan/Drop					Operate Participation													
SDG&E	Main ESR (Basic/Plan) Program					Central Records and Incentives/Program Launch		Program Ramp Up											
	ESR Plan/Drop Pilot																		
	ESR Plan/Drop Pilot 2.0					Workshop/Bidder/Oversee RI		File RI, Approval (RI Equal RFP Preparation and BID Package Development (work in progress))				RFP Release and Bidder Development (RI due 1/1)							
	Multi-Family/Whole-Building Program	Negotiations																	
	IT Solutions	To Be Determined																	
† Transition Planned Dates as of 3/1/2022. *** Includes SoCalGas Initiative as part of the ESR Program Joint Pilot Plan END OF RELEASE ON 03/24/2022 SCE: Updated Key Dates for ESR Equipment Vendors RFP: BID Evaluation (in subject to change based on SCE's determination if an RFP is needed). SoCalGas: Changed Main ESR (Basic/Plan) Program Key Dates - Extended SDG&E: Changed central record date for the Main ESR Program from 10/31 to 11/14. PG&E: 11/14 to Main ESR (from 10-11) updated records/incentives extended to 11/14. Incentives where "Central Records and Incentives/Program Launch" date not applicable where launch occurs separately from central incentives, the term "Central Records/Incentives" is referred to the schedule.																			

Energy Savings Assistance Program

Update on ESA Contractor Funding (Jan-July 2022)

Utility	Funding Issue	Impact
PG&E	PG&E increased contractor funding by \$27M to begin 2022 in order to provide a glide path into the new cycle.	2022 is a transition year; PG&E's budget allocation is consistent with supporting this transition equitably between the existing and new contractors.
SCE	2022 budget is fully committed. Attributed to carryover enrollments from year to year. Remaining budget is sufficient to cover existing ESA Core enrolled customers.	To mitigate overspending, SCE suspended enrollments and adopted a waitlist strategy.
SDG&E	No contractor funding issue	None
SoCalGas	Nothing to report	N/A





Joint IOUs Report of the CARE, FERA and ESA Programs

Low Income Oversight Board Meeting

September 29, 2022

WebEx

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.

Jan-July 2022 CARE Program Updates*

Authorized 2022 Program Budgets and Expenditures				
Utility	2022 Budget	Expenditures	%	Rate Discounts
PG&E	\$13,760,000	\$6,242,567	45%	\$537,893,075
SCE	\$8,822,256	\$4,584,977	52%	\$344,194,395
SDG&E**	\$6,741,045	\$2,754,664	41%	\$118,266,451
SoCalGas	\$10,085,592	\$4,698,276	47%	\$124,929,206
Total	\$39,408,893	\$18,280,486		\$1,007,016,676

Jan-July 2022 Enrollment						
Utility	Total Residential Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled***	Enrollment Rate	Newly Enrolled Customers
PG&E	5,641,365	1,401,702	25%	1,454,447	104%	117,747
SCE	4,602,750	1,276,922	28%	1,193,117	93%	177,780
SDG&E	1,390,995	289,316	21%	350,017	121%	44,357
SoCalGas	5,711,246	1,606,753	28%	1,782,811	111%	187,529
Total	17,346,356	4,574,693		4,780,392		527,413

* Authorized budgets pursuant to Decision (D.)21-06-015. Jan-July 2022 as reported in the IOU ESA-CARE-FERA Monthly Report filed August 22, 2022.

** SDG&E continues to analyze its data for changes to customer totals due to a processing backlog and potential data discrepancies currently under review.

*** Total households enrolled includes sub-metered households.

Note: Enrollment Rate is also known as Penetration Rate.



CARE Program *CARE Enrollment map*

PG&E



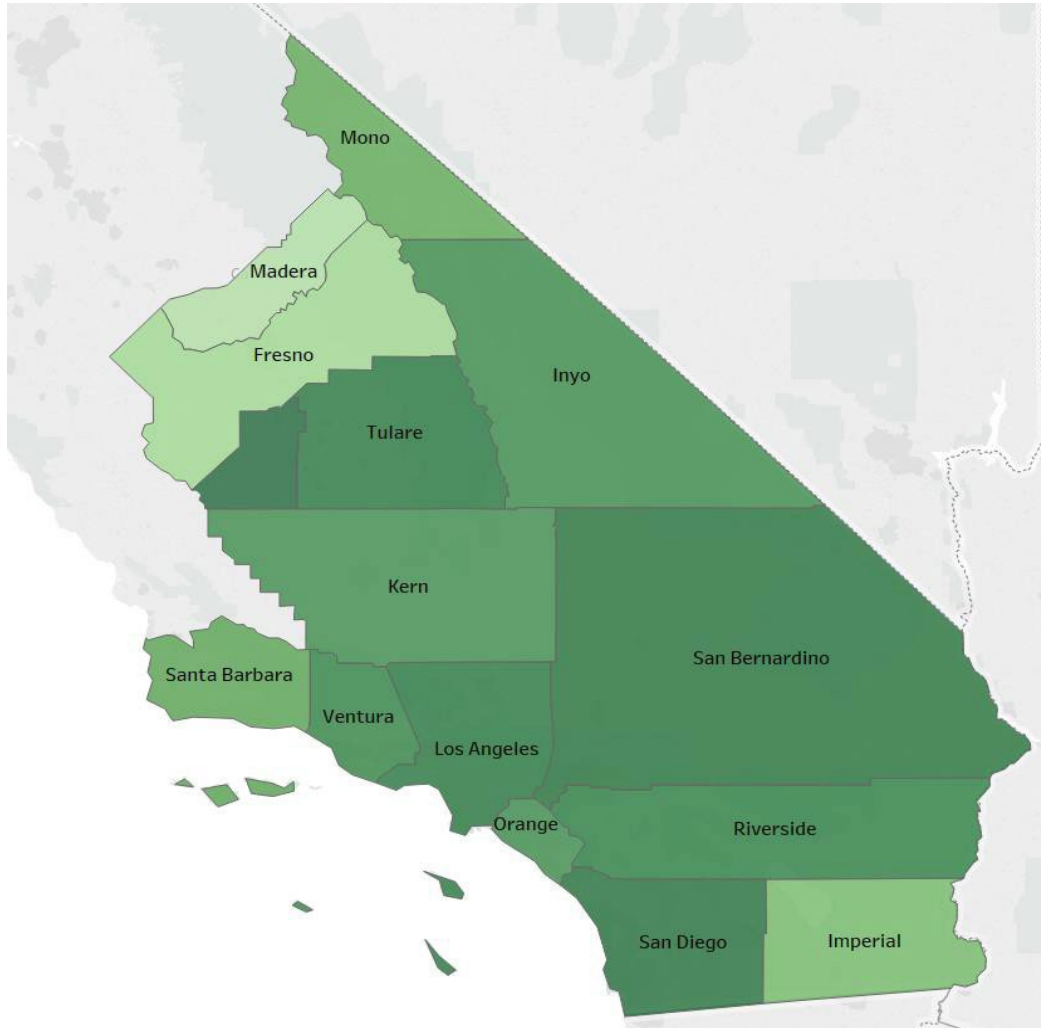
PG&E Counties With Lowest Enrollment Rates	
County	Enrollment Rate*
PLUMAS	59%
MARIPOSA	62%
CALAVERAS	69%
MENDOCINO	69%
SACRAMENTO	74%
TUOLUMNE	76%
PLACER	77%
SAN FRANCISCO	79%
SAN LUIS OBISPO	80%
STANISLAUS	80%

*Represents PG&E counties with the lowest enrollment rates, as of July 31, 2022.

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

CARE Program *CARE Enrollment map*

SCE



County	Enrollment Rate*
Kings	110%
Riverside	108%
Tulare	104%
Los Angeles	98%
San Bernardino	92%
Ventura	82%
Orange	79%
Kern	71%
Inyo	71%
Santa Barbara	64%
Mono	34%

*Represents the enrollment rates for all SCE counties effective July 31, 2022 and excludes counties with less than 1,000 estimated eligible households

CARE Program *CARE Enrollment map*



SDG&E



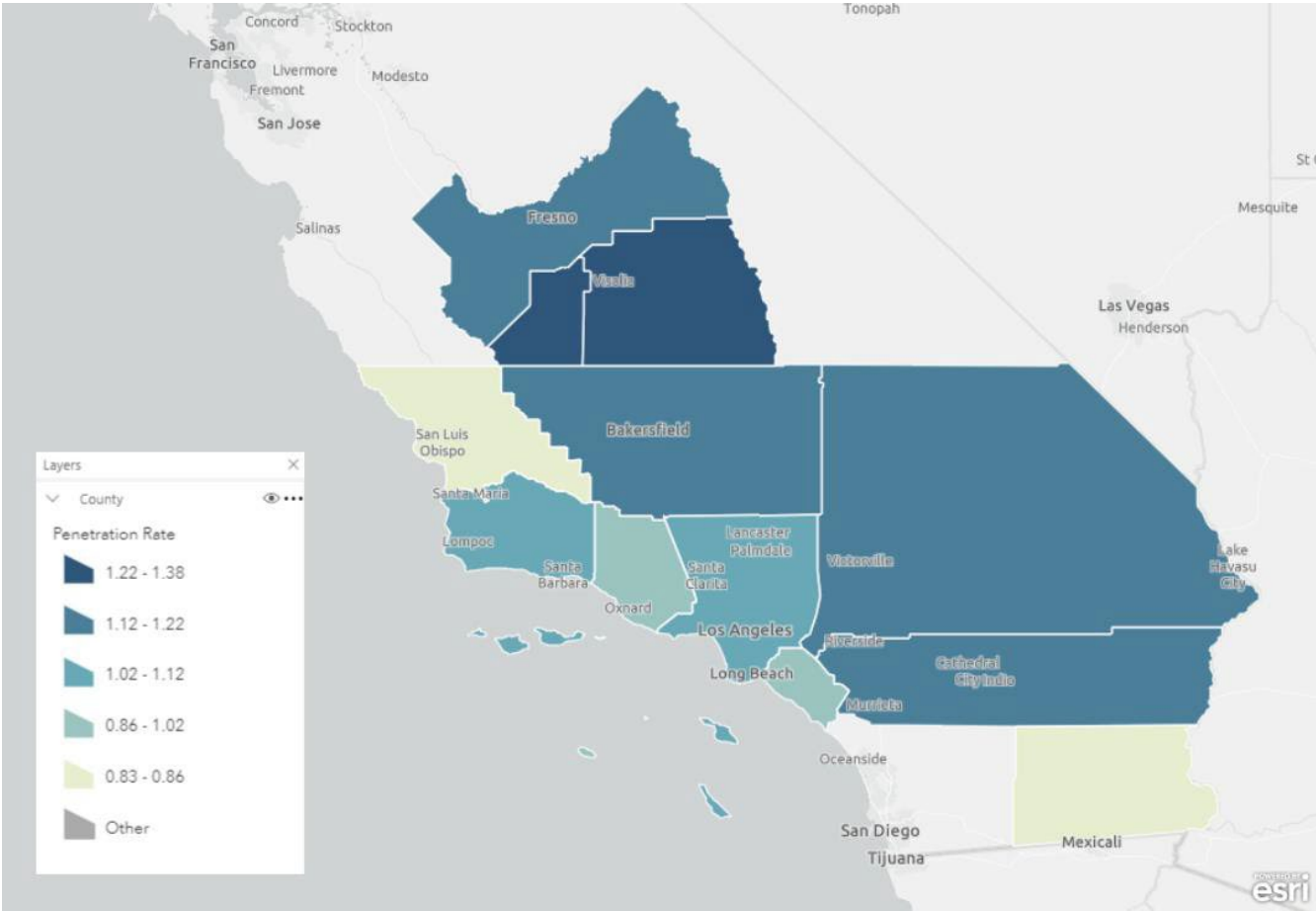
Zip codes with lowest enrollment (overall)	
City	Enrollment Rate
Miramar	9%
Rancho Santa Fe	13%
Mount Laguna	18%
Coronado	33%
Laguna Beach	36%
Del Mar	50%

*Represents SDG&E zip codes with the lowest enrollment rates, July 31, 2022.

CARE Program *CARE Enrollment map*



SoCalGas



County	Enrollment Rate *
Kings	138%
Tulare	138%
San Bernardino	122%
Fresno	120%
Kern	120%
Riverside	119%
Santa Barbara	112%
Los Angeles	109%
Ventura	102%
Orange	97%
Imperial	86%
San Luis Obispo	83%

*Represents the enrollment rates for all SoCalGas counties effective July 31, 2022, as reported in the IOU ESA-CARE Monthly Report (Filed August 22, 2022).

FERA Program

Jan-July 2022 FERA Program Updates*

Authorized 2022 Program Budgets Expenditures				
Utility	2022 Budget	Expenditures	%	Rate Discounts
PG&E	\$2,794,400	\$1,603,641	57%	\$9,338,658
SCE	\$1,286,280	\$539,120	42%	\$5,928,852
SDG&E	\$703,150	\$150,202	21%	\$2,408,800
Total	\$4,783,830	\$2,292,963		\$15,267,510

Jan-July 2022 Enrollment						
Utility	Total Residential Electric Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled	Enrollment Rate	Newly Enrolled Customers
PG&E**	4,802,843	174,219	4%	36,643	21%	7,686
SCE	4,602,750	221,674	5%	24,791	11%	4,543
SDG&E***	1,390,995	43,709	3%	12,108	28%	1,397
Total	10,796,588	439,602		73,542		13,626

* Authorized budgets pursuant to D.21-06-015. Jan-July 2022 as reported in the IOU ESA-CARE-FERA Monthly Report filed August 22, 2022.

** Despite expending 37% of its marketing and outreach budget, PG&E enrollment rate is forecasted to fall short of the 40% goal.

*** SDG&E continues to analyze its data for changes to customer totals due to a processing backlog and potential data discrepancies currently under review.

Note: Enrollment Rate is also known as Penetration Rate.

FERA Program *FERA Enrollment map*

PG&E



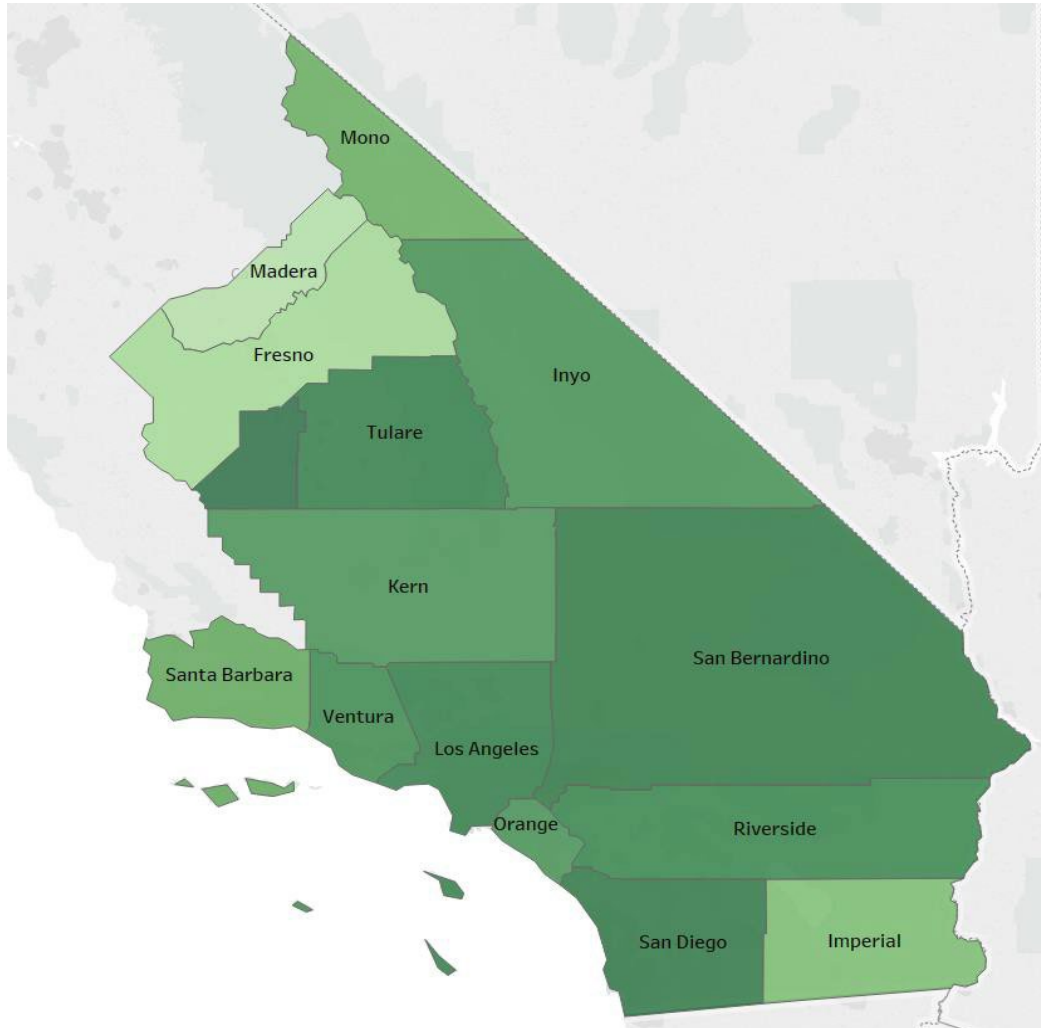
PG&E Counties With Lowest Enrollment Rates	
County	Enrollment Rate*
SANTA BARBARA	8%
TULARE	9%
MONTEREY	12%
MADERA	14%
KINGS	14%
KERN	15%
NAPA	15%
SAN LUIS OBISPO	15%
TEHAMA	16%
MERCED	16%

*Represents PG&E counties with the lowest enrollment rates, as of July 31, 2022.

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

FERA Program *FERA Enrollment map*

SCE

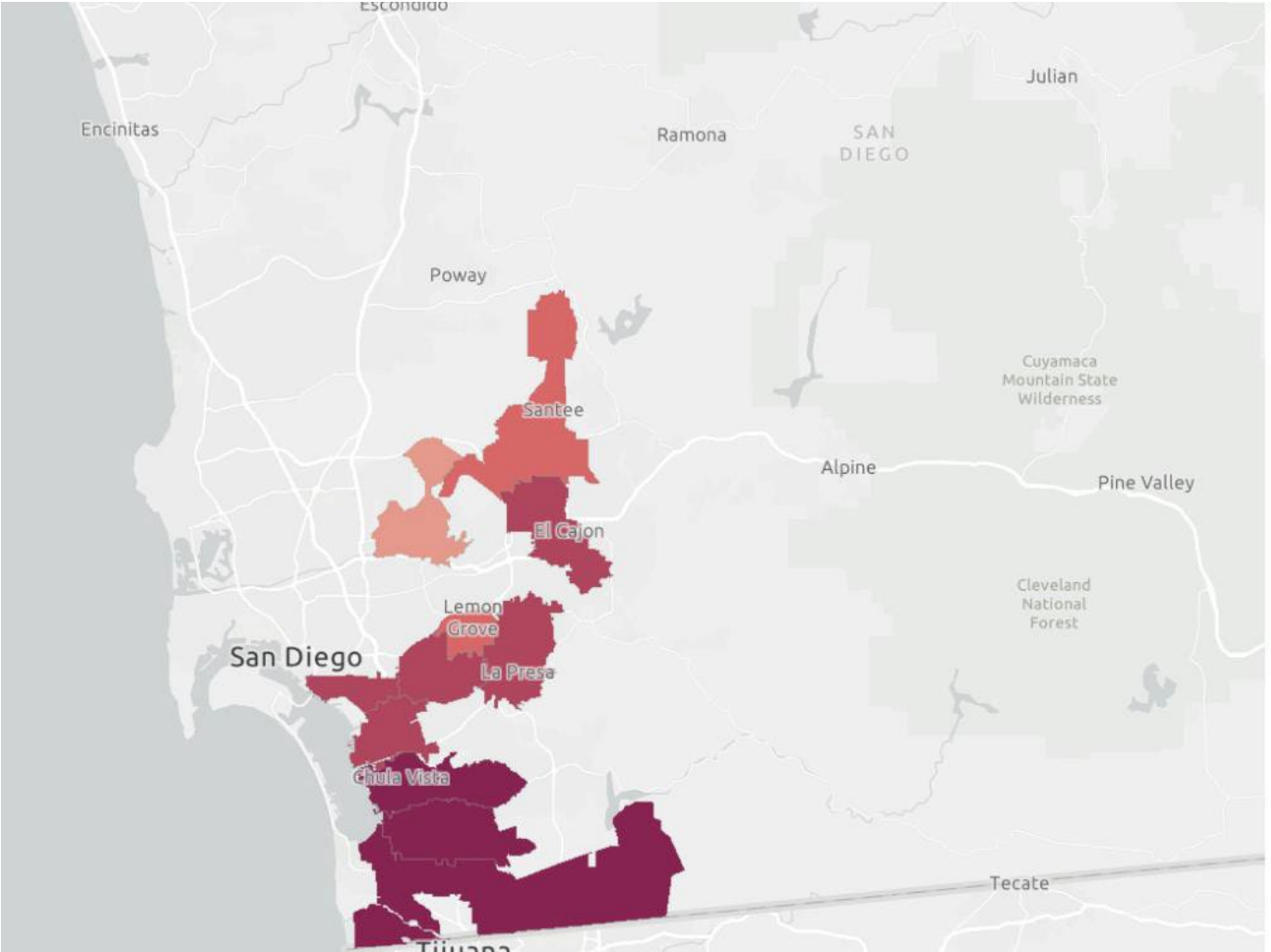


County	Enrollment Rate*
Riverside	14%
Orange	13%
San Bernadino	11%
Los Angeles	10%
Ventura	10%
Tulare	10%
Kings	9%
Kern	9%
Santa Barbara	8%

*Represents the enrollment rates for all SCE counties effective July 31, 2022 and excludes counties with less than 1,000 estimated eligible households

FERA Program *FERA Enrollment map*

SDG&E



Zip codes with lowest enrollment (overall)	
City	Enrollment Rate
Santee	43%
Chula Vista (east)	42%
El Cajon	36%
San Diego (southeast)	34%
Spring Valley	33%
Chula Vista (north)	32%
San Diego (south bay)	32%
San Ysidro	29%
National City	28%

*Represents SDG&E zip codes with the lowest enrollment rates, July 31, 2022.

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.

2022 ESA Program Budget Updates (Jan-July 2022) *

Jan-July 2022 Authorized Program Budgets and Expenditures			
Utility	Authorized Budget ¹	YTD Expenditures ²	%
PG&E	\$180,979,812	\$75,587,779	42%
SCE ³	\$75,300,964	\$39,721,203	53%
SDG&E	\$27,432,330	\$7,851,077	29%
SoCalGas	\$116,291,772	\$49,611,541	43%
Total	\$400,004,878	\$172,771,600	43%

* Jan-July 2022 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed August 22, 2022.

¹ Authorized budgets pursuant to D.21-06-015. Jan-July 2022 as reported in the IOU ESA-CARE-FERA Monthly Report filed August 22, 2022.

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

³ Includes shift of \$14.7 in unspent uncommitted funds to supplement 2022 ESA program budget approved in AL 4702-E-A.



Energy Savings Assistance Program

2022 Energy Savings Targets (Jan-July 2022)

2022 Annual Savings for YTD Treatment ¹			Estimated Annual HH Usage for HH Treated YTD ²		Savings as % of Average HH Usage		Annual Program Savings Goal ³	
Utility	kWh	therms	kWh	therms	kWh	therms	kWh	therms
PG&E	14,867,914	678,604	262,520,028	13,793,425	5.7%	4.9%	15,093,167	629,105
SCE	16,672,551	N/A	210,194,408	N/A	7.9%	N/A	18,788,420	N/A
SDG&E	581,114	11,133	19,667,376	1,085,467	3%	1.0%	2,955,161	127,171
SoCalGas	N/A	362,535	N/A	16,162,978	N/A	2.2%	N/A	1,435,220
TOTAL	32,121,579	1,052,272	492,381,812	31,041,870			36,836,748	2,191,496

¹ Jan-July 2022 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed August 22, 2022.

² Derived from average CARE Customers Usage for PY 2021 (Annual Report CARE Table 9) multiplied by January 1-July 31, 2022 homes treated and annualized.

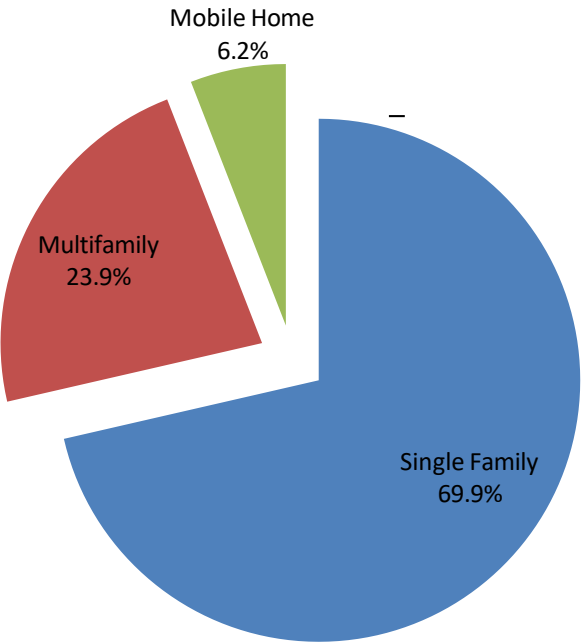
³ Per Attachment 1 of D.21-06-015. Includes ESA Program (SF, MH, MF In unit) and MF CAM.



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.

SW Participation By Type



2022 Households Treated (Jan-July 2022)

2022 Households Treated ¹				
Utility	Est. HH Treated Target	Total	Total as % of 2022 Treated	Total as % of Eligible ESA HH ²
PG&E	59,340	41,199	69%	2.26%
SCE	27,051	33,127	122%	2.00%
SDG&E	13,760	4,478	33%	1.55%
SoCalGas	94,600	49,665	53%	2.13%
Total	194,751	128,469		

¹ Jan-July 2022 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed August 22, 2022.

² As of 7/1/22, Athens estimate of IOU residential customers estimated eligible for ESA at 250% of FPL; updated annually in February.



Energy Savings Assistance Program

Jan-July 2022 MULTIFAMILY UPDATES

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

- **PG&E:** As of August 2022, PG&E's SPOC has expanded the program offerings from 39 to 41 programs and started coordination with other IOUs SPOC programs, and local water and air district program. PG&E's SPOC team has referred 285 multifamily customers to 31 programs YTD, and 45 referrals have been converted to program applications.
- **SCE:** For 2022, SCE has been authorized to spend \$1,800,000 for MF CAM. SCE is currently working on 5 projects. The budget has been allocated for these projects, so SCE has moved to a reservation process for any new MF CAM projects. As projects are completed and if there is a budget remaining, SCE will approve new MF CAM projects to commence. SCE plans to continue running MF CAM until the Southern Multifamily Whole Building (MFWB) Program is open to participation in 2023.
- **SDG&E:** SDG&E's SPOC has continued to work with ESA, ESA CAM and SOMAH implementers on leveraging leads across programs. The SPOC facilitated the Co-Branding of the SDG&E logo for the new joint IOU SOMAH implementer website.
- **SoCalGas:** Through July 31, 2022, the ESA CAM SPOCs continue deliver viable CAM projects. Customer participation in the program is increasing and it is anticipated that Project Homekey sites will begin to increase due to additional State funding. SoCalGas forecasts that ESA CAM projects will exceed its 2022 CAM goal by year end. Funding is on-target based on the carry-over funds available from the prior cycle.

Common Areas: All IOUs continue implementing their Common Area Measures Initiative Implementation Plans in 2022.

- **PG&E:** As of August 2022, PG&E has successfully completed 24 ESA CAM projects and treated 223 buildings with 2,311 units YTD. The program has reached its enrollment goal for program year (PY) 2022 and has officially closed enrollment for PY 2022 due to limited time left in this program cycle. PG&E has 27 active CAM projects in the pipeline as of August 2022.
- **SCE:** As of July 2022: Deed Restricted: In progress – 5 Whole Building, 0 Common Area, 0 In-Unit. Deed Restricted: Completed – 36 Whole Building, 24 Common Area, 25 in-unit. Market Rate: In progress – 0 in-unit. Market Rate: Completed – 34 in-unit.
- **SDG&E:** As of July 2022, 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. SDG&E successfully treated 8 properties, benefiting 58 buildings and 770 MF Tenant units.
- **SoCalGas:** As of July 31, 2022, SoCalGas has completed 13 central boiler projects. These projects have impacted 1,212 units, 16 buildings, and improved the health, safety, and comfort of over 3,000 tenants. These projects have annual therm savings of 73,547. In addition, there are currently 11 active CAM projects in various stages of completion.

ENERGY EDUCATION

The Statewide Energy Education team is working on updating the existing Energy Education Resource Guide. The revised guide should be available in Q4 2022. In addition, the team will be establishing a series of meetings to collectively work on the development of utility neutral online education materials. These materials are anticipated to be available beginning in 2023 upon final approval by the IOUs collectively.

Tribal Community Outreach Update

Compliance/Outreach Activities as of July 2022

- PG&E's Tribal Consultation Plan for program year 2022 consist of outreach to the leadership of all 62 Federally Recognized and 40 Non-Federally Recognized tribal communities. The outreach plan also includes 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, and newsletters.
- In June, PG&E launched its Tribal Grant Program, which offers \$5,000 in stipend to interested tribes for providing information regarding PG&E assistance programs and energy conservation to its members. Information about the grant was shared with all tribes via email and featured in PG&E's Q2 Tribal Newsletter.
- In July, PG&E met with 11 tribes that requested more information about Tribal ESA Grants. Furthermore, a reminder email was sent to 13 additional tribes informing them that PG&E is inviting them to apply for grants this year. PG&E has received one application.

Opportunities

- PG&E is looking at ways to improve grant participation in 2023:
 - Evaluate existing outreach efforts
 - Invite feedback from tribes
 - Evaluating grant structure and award amount
 - Identify additional opportunity to coordinate with CARE/FERA CBO outreach

Tribal Community Outreach Update



OUTREACH STATUS	List of Participating Tribes
Tribes completed ESA Meet & Confer	Blue Lake Rancheria, Cloverdale Rancheria, Hoopa Valley Rancheria, Ione Band of Miwok Indians, Karuk Tribe, Robinson Rancheria, Scotts Valley Band of Pomo, Sherwood Valley Rancheria of Pomo Indians, and Tejon Indian Tribe.
Tribes requested outreach materials or applications	Sherwood Valley Rancheria of Pomo Indians
Partnership offer on Tribal Lands	<p>(Federally-Recognized Tribes) Bear River Band of the Rohnerville Rancheria, Big Lagoon Rancheria, Big Sandy Rancheria, Big Valley Band Rancheria, Blue Lake Rancheria, Buena Vista Rancheria of Mi-Wuk Indians, Cachil DeHe Band of Wintun Indians of the Colusa Indian Community, Cahto Tribe (Laytonville), California Valley Miwok Tribe, Chicken Ranch Rancheria, Cloverdale Rancheria of Pomo Indians of California, Cold Springs Rancheria, Cortina Rancheria, Coyote Valley Band of Pomo Indians, Dry Creek Rancheria of Pomo Indians, Elem Indian Colony, Enterprise Rancheria, Federated Indians of Graton Rancheria, Greenville Rancheria, Grindstone Indian Rancheria, Guidiville Indian Rancheria, Habematoel Pomo of Upper Lake, Hoopa Valley Tribe, Hopland Band of Pomo Indians, Ione Band of Miwok Indians of California, Jackson band of Mi-Wuk Indians, Kashia Band of Pomo Indians of the Stewart's Point Rancheria, Karuk Tribe, Lower Lake (Koi Tribe), Lytton Rancheria of California, Manchester Band of Pomo Indians, Mechopoda Indian Tribe, Middletown Rancheria of Pomo Indians, Mooretown Rancheria, North Fork Rancheria, Paskenta Band of Nomlaki Indians, Picayune Rancheria of Chukchansi Indians, Pinoleville Pomo Nation, Pit River Tribe, Potter Valley Tribe, Redding Rancheria, Redwood Valley, Little River Band of Rancheria of Pomo, Robinson Rancheria, Round Valley Reservation, Santa Ynez Band of Chumash Mission Indians, Scotts Valley Band of Pomo Indians, Sherwood Valley Rancheria, Shingle Springs Band of Miwok Indians, Susanville Indian Rancheria, Table Mountain Rancheria, Tachi-Yokut Tribe (Santa Rosa Rancheria, Leemore, CA), Tejon Indian Tribe, Trinidad Rancheria, Tule River Indian Reservation, Tuolumne Band of Me-Wuk Indians, Tyme Maidu Tribe-Berry Creek Reservation, United Auburn Indian Community, Wilton Rancheria, Wiyot Tribe, Washoe Tribe of CA and NV, Yocha Dehe Wintun Nation, Yurok Tribe.</p> <p>(Non-Federally Recognized Tribes): Amah Mutsun Tribal Band, American Indian Council of Mariposa County (Southern Sierra Miwok Nation), Butte Tribal Council, Calaveras Band of Mi-Wuk Indians, California Choinumni Tribal Project, Chaushila Yokuts, Coastal Band of the Chumash Nation, Coastanoan Ohlone Rumsen-Mutsen Tribe, Dumna Wo-Wah Tribal Government, Dunlap Band of Mono Indians, Dunlap Band of Mono Indians Historical Preservation Society, Haslett Basin Traditional Committee, Honey Lake Maidu, Indian Canyon Mutsun Band of Costanoan, Kern Valley Indian Council, Kawaiisu Tribe, Kings River Choinumni Farm Tribe, Mishewal-Wappo Tribe of Alexander Valley, Muwekma Ohlone Indian Tribe, Nor-Rel-Muk Nation, North Fork Mono Tribe, Northern Band of Mono Yokuts, Noyo River Indian Community, Ohlone Indian Tribe, Salinan Tribe of Monterey San Luis Obispo and San Benito Counties, San Luis Obispo County Chumash Council, Shelbelna Band of Mendocino Coast Pomo Indians, Sierra Mono Museum, Strawberry Valley Rancheria, The Mono Nation, Traditional Choinumni Tribe (East of Kings River), Trina Marine Ruano Family, Tsungwe Council, Tubatulabal Tribe, Wailaki Tribe, Winnemem Wintu Tribe, Wintu Tribe of Northern California, Wukchumni Tribal Council, Wuksachi Indian Tribe, Xolon Salinan Tribe.</p>
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	<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, Ione Band of Miwok Indians, Karuk Tribe, Laytonville Rancheria, North Fork Rancheria, Picayune Rancheria, Pinoleville Reservation, Pit River Tribes, Round Valley Reservation, Santa Rosa Rancheria Tachi-Yokut, Stewarts Point Rancheria (Kashaya Pomo), Susanville Indian Rancheria, Tejon Indian Tribe, Tule River Indian Tribe, Upper Lake Rancheria, Washoe Tribe, Wilton Rancheria, and Yurok Tribe.</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>
Housing Authority and TANF offices who participated in Meet and Confer	Hoopa Valley Housing Authority, Hoopa Valley TANF Office, North Fork Rancheria Housing Authority, and Wilton Rancheria Housing Authority

Tribal Community Outreach Update



Energy Savings Assistance Program Table 7 - Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions

Pacific Gas and Electric Company

Through July 31, 2022

ESA Main (SF, MH, MF in-unit)

Customer Segments	# of Households Eligible [1]	# of Households Treated [2]	Enrollment Rate = (C/B)	# of Households Contacted [3]	Rate of Uptake = (C/E) [19]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures) [4]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only) [5]	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures) [4]	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only) [5]	Avg. Cost Per Treated Households
Tribal	1,967	2	0%	3	100%	545.13	545.13	0.07	3.82	3.82	\$ 2,165

Note: This data currently only captures tribal households located on federally-recognized tribes whose trust lands are identified in the Bureau of Indian Affairs. The data does not include ESA customers who are members of non federally-recognized tribes or households that self-identified as Native American. PG&E plans to incorporate self-reported information into this reporting in Q4 2022.

Tribal Community Outreach Update

Outreach Activities	SUCSESSES & CHALLENGES
<ul style="list-style-type: none">• The activities are in accordance with D.21-06-015.• SCE's tribal liaisons meet with all 13 tribes twice annually, discussing available programs & services• Maintained at least two tribal contacts per tribe• Ongoing efforts to identify tribes seeking federal recognition• Updates made to dedicated page on sce.com for tribal outreach, including wildfire safety, EE programs, etc.• Mini-grant Discussions: outreach methods, application design, grant amounts, issuance, participation guidelines and expectations	<ul style="list-style-type: none">• Success: Ongoing communication with some tribal contacts• Success: Receptive to accepting and distributing program information• Challenge: Identifying non-federally recognized tribes• Challenge: Low response rates

SCE Tribal Community Landscape

- Southern California Edison has 13 federally-recognized Tribes in its service territory.

Agua Caliente Band of Cahuilla Indians	Pechanga Band of Luiseño Mission Indians of the Pechanga Reservation
Benton Paiute	San Manuel Band of Serrano Mission Indians of the San Manuel Reservation
Bishop Paiute	Soboba Band of Luiseño Indians
Bridgeport Indian Colony	Timbisha Shoshone
Chemehuevi Indian Tribe of the Chemehuevi Reservation	Tule River Indian Tribe of the Tule River Reservation
Colorado River Indian Tribes	Twenty-Nine Palms Band of Mission Indians of California
Morongo Band of Cahuilla Mission Indians	

Tribal Segment Reporting

Q1 2023: To capture tribal segments and enrollments, SCE will update its enrollment form to include an option for tribal members to self-identify, provide the name of their tribe and to indicate whether they are living inside or outside of a Tribal community.

Energy Savings Assistance Program Table 7 – Customer Segments/Needs State by Demographic, Financial, Location and Health Conditions Southern California Edison Through July 31, 2022											
ESA Main (SF,MH, MF In-Unit)											
Customer Segments	# of Households Eligible	# of Households Treated [1]	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households
Location											
Tribal	Unknown	44	100	0	0	0	0	0	N/A	N/A	0

[1] Households treated totals are from Chemehuevi Indian Tribe

Tribal Community Outreach Update



OUTREACH ACTIVITIES (in accordance with D.21-06-015)	SUCCESES & CHALLENGES
<ul style="list-style-type: none">• Tribal Relations Manager has contacted all Tribes SDG&E serves to conduct listening sessions.<ul style="list-style-type: none">• To date, has held twelve (12) meet & greets.• SDG&E sent an online survey to all tribal contacts and followed up with focus groups mid-year.• Mini-grant process has been initiated and offered to the seven (7) tribes with members that potentially qualify for Low-Income programs.<ul style="list-style-type: none">• To date, three (3) tribes have responded.• Continued partnerships with two Tribal CBOs:<ul style="list-style-type: none">• Southern California Tribal Chairmen's Association (SCTCA)<ul style="list-style-type: none">• Total Outreach Activities YTD: 10• Total Reach: 71,074• Southern California American Indian Resource Center (SCAIR)<ul style="list-style-type: none">• Total Outreach Activities YTD: 34• Total Reach: 23,438	<ul style="list-style-type: none">• Success: SDG&E continues to be proactive in promoting low-income programs to Tribes willing to meet and confer.• Success: Through ongoing CBO partnerships, SDG&E staff has been invited to participate in SCAIR and SCTCA outreach events to promote CARE, FERA, ESA.• Success: Tribes that SDG&E has met with have had positive feedback regarding SDG&E's outreach and engagement efforts.• Challenge: Engaging non-federally recognized tribes.• Challenge: Tribes are overwhelmed with requests and have limited resources, so they don't always respond.• Challenge: Mini-grants require Tribes to complete tax paperwork before payment can be issued.

SDG&E Tribal Community Landscape



- SDG&E has 17 Federally recognized and 3 non-Federally recognized Tribes in its service territory.
 - Of the 17 Federally recognized Tribes, **16 receive service*** provided by SDG&E.
 - These 16 tribes have approximately 2,900 meters** that receive electric service from SDG&E.

Federally Recognized Tribes in SDG&E's Service Territory	
Barona Band of Mission Indians	Mesa Grande Band of Mission Indians
Campo Kumeyaay Nation	Pala Band of Mission Indians
Ewiiapaayp Band of Kumeyaay Indians (Cuyapaipe Reservation)	Pauma Band of Luiseno Indians
Inaja & Cosmit Band of Indians	Rincon Band of Luiseno Indians
Jamul Indian Village	San Pasqual Band of Mission Indians
La Jolla Band of Mission Indians	lipay Nation of Santa Ysabel (Santa Ysabel Reservation)
La Posta Band of Mission Indians	Sycuan Band of Kumeyaay Nation
Los Coyotes Band of Mission Indians	Viejas Band of Kumeyaay Indians
Manzanita Band of Kumeyaay Nation	(row intentionally left blank)
Non-Federally Recognized Tribes in SDG&E's Service Territory	
Juaneno Band of Mission Indians	San Luis Rey Band of Mission Indian
Kwaaymii	(row intentionally left blank)

* Tribal communities in bold are those that receive service from SDG&E.

** SDG&E does not maintain tribal nation boundary data and is reliant on geographic boundary data provided by the San Diego Association of Governments (SANDAG.) Data is based on location of SDG&E transformers and does not reflect actual meters within the geographic boundaries of tribal land. Actual customers may fall inside or outside of those boundaries.

Tribal Segment Reporting



Energy Savings Assistance Program Table - 7 Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions

San Diego Gas & Electric

July 2022

ESA Main (SF, MH, MF in-unit)									
Customer Segments	# of Households Eligible [1]	# of Households Treated [2]	Enrollment Rate = (C/B)	# of Households Contacted [3]	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households	Avg. Energy Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households	Avg. Cost Per Treated Households
Demographic									
Tribal	21,716	31	0%	806	4%	39.735	0.005	-0.350	\$ 188

Tribal Community Outreach Update



Outreach Activities	SUCSESSES & CHALLENGES
<p>The activities are in accordance to D.21-06-015.</p> <ul style="list-style-type: none">• SoCalGas maintains communication with Tribes serviced by SoCalGas.<ul style="list-style-type: none">• SoCalGas reaches out to all federally-recognized Tribes in its service territory via email, phone and in person at community events• SoCalGas strives to maintain at least two Tribal contacts for each Tribe in its service territory• SoCalGas is enhancing its outreach strategy to help navigate and increase engagement within tribal communities.<ul style="list-style-type: none">• Finalizing contract with Tribal consultant to help roll out outreach strategy	<ul style="list-style-type: none">• Success: Working with Community Based Organizations specific to Tribal communities to assist in providing information on programs to the community and at Tribal events such as Pow Wows• Challenge: SoCalGas provides service to 10 of the 21 tribes in service territory. Only 16,689 residential meters of which 93% are on leased land – providing limited opportunities for program participation• Challenge: Identifying non-federally recognized tribes• Challenge: Low response rates from tribes to receive additional program information

SoCalGas Tribal Community Landscape

- SoCalGas has 21 federally-recognized Tribes in its service territory.
 - Of the 21 Tribes, **10 have natural gas service*** provided by SoCalGas.
 - These 10 tribes have a total of 16,689 natural gas meters of which 93% are on leased land – with no certainty that the land occupant is a Tribal member.

Agua Caliente Band of Cahuilla Indians	San Manuel Band of Serrano Mission Indians of the San Manuel Reservation
Augustine Band of Cahuilla Indians	Santa Rosa Band of Cahuilla Indians
Cabazon Band of Mission Indians	Santa Ynez Band of Chumash Mission Indians of the Santa Ynez Reservation
Cahuilla Band of Mission Indians of the Cahuilla Reservation	Serrano Nation of Mission Indians
Chemehuevi Indian Tribe of the Chemehuevi Reservation	Soboba Band of Luiseño Indians
Chumash Tribe of Indians	Tachi Yokut Tribe of Indians
Fort Mojave Indian Tribe	The Juaneño Band of Mission Indians
Los Coyotes Band of Cahuilla and Cupeno Indians	Torres-Martinez Desert Cahuilla Indians
Morongo Band of Cahuilla Mission Indians	Tule River Indian Tribe of the Tule River Reservation
Pechanga Band of Luiseño Mission Indians of the Pechanga Reservation	Twenty-Nine Palms Band of Mission Indians of California
Ramona Band of Cahuilla Indians	(Intentionally left blank.)

*Tribe communities written in bold are the 10 that have natural gas service.

Tribal Segment Reporting

Energy Savings Assistance Program Table - 7 Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions

Southern California Gas Company

July 2022

ESA Main (SF, MH, MF in-unit)											
Customer Segments	# of Households Eligible*	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Household (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Household (Energy Saving Measures Only)	Avg. Peak Demand Energy Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Household (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Household (Energy Saving Measures Only)	Avg. Cost Per Treated Household
Demographic											
Tribal [6]		8							6.44		

SoCalGas uses geographic boundary information to identify federally recognized tribal areas in conjunction with an augment to the ESA application to allow for customer to self-identify as a member of a tribal community.



*Pacific Gas and
Electric Company™*



Joint IOUs Unspent Funds for Energy Savings Assistance Program

Low Income Oversight Board Meeting

September 29, 2022

WebEx

PG&E's Unspent ESA Program Funds

Total Remaining ESA Unspent Funds (\$M)	
Unspent Funds through 12/31/2021 [1]	\$71.03
Unspent Funds through 7/31/2022 [2]	\$50.31

1. This is the remaining Unspent Funds amount from 2009-2021 program cycles. Per D.21-06-015, the remaining uncommitted and unspent funds at the end of 2021 must be used to offset 2022 collection, hence PG&E included this information in Advice Letter 6408-E-A for 2022 Annual Electric True-Up - Consolidated Electric Rate Changes Effective January 1, 2022.
2. \$24.5M is committed to off-set Aug-Dec 2022 collection. \$25.8M is committed for PY 2022 activities. Any unspent funds at the end of 2022 must be used to offset 2023 collection.

SCE's Unspent Funds for ESA Program

Total Remaining Unspent Funds (\$M)	
Unspent Funds through 12/31/21 [1][2]	\$24.75
2022 Revenue Collected (Jan – Jul)	\$34.28
2022 Expenses from (Jan – Jul)	\$37.43
2022 Accrued Interest (Jan-Jul)	\$0.08
Total Unspent Funds through 7/31/2022	\$21.69

1. This is the remaining Unspent Funds amount from 2009-2021 program cycles through December 31, 2021.
2. Requested and received approval (AL 4702-E-A) to shift \$14.7 in unspent and uncommitted funds to the ESA program to supplement the 2022 budget.

Note: Unspent funds may only be used for ESA program activities.

SDG&E's Forecasted Unspent Funds for ESA Program



Total Remaining Unspent Funds (\$ in millions) [1]		
Remaining unspent funds as of December 31, 2021 [2]		\$25.68
Unspent & uncommitted funds used to offset 2022 budget revenue requirement [3]		- \$13.60
Revenues collected through YTD July 2022		+ \$5.92
Expenses incurred through YTD July 2022 [4]		- <u>\$8.10</u>
Total remaining unspent funds as of July 31, 2022 [5]		= \$9.90
Total remaining ESA CAM committed funds as of July 31, 2022 [2]		- <u>\$3.74</u>
Total remaining unspent & uncommitted funds as of July 31, 2022 [5]		= \$6.16
1. Unspent funds are only available for ESA activities.		
2. As reported in the 2021 Annual Report, the remaining unspent funds as of December 31, 2021 of \$25.68M includes \$4.33M for ESA CAM (Table 1A). D.19-06-022 directs the IOUs to use unspent and uncommitted ESA CAM for program year 2021. D.21-06-015 directs the IOUs to carry-forward all unspent and uncommitted ESA common area measures funding as of June 30, 2021 into the remainder of program year 2021 and 2022.		
3. D.21-06-015, OP 114, SDG&E is instructed to use unspent and uncommitted funds before requesting new funds. SDG&E estimated to have \$13.60M in unspent and uncommitted LIEEBA and PGLIEEBA funds to offset the 2022 authorized funding in the 2022 Public Purpose Program rates.		
4. Reflects expenses from ESA Tables 1 + 1A, net of manual adjustments.		
5. Does not include YTD interest income recorded 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	\$491.69
2017-2020 Total Expenses [2]	\$394.62
2017-2020 Unspent Funds [1]	\$97.07
Total Remaining Unspent Funds through PY 2020 [1]	\$222.22
2021 Revenues Collected	\$9.12
2021 Total Expenses [2]	\$112.91
Total Remaining Unspent Funds through PY 2021 [1]	\$118.43
2022 Revenues Collected	\$0.00
2022 Total Expenses [3]	\$50.91
Total Remaining Unspent Funds as of 7/31/2022 [1]	\$67.52
Footnotes	
[1] Unspent Funds related to Revenues Collected	
[2] Total Expenses from Annual and Monthly Reports - Tables 1 and 1A	
[3] Total Expenses from July 2022's Monthly Report - Summary Table	
Note: Unspent funds can only be used for ESA Program activities or returned to ratepayers	



Smart Thermostats for ESA Customers

Low Income Oversight Board Meeting

September 29, 2022

WebEx

Smart Thermostats for ESA Customers

	PG&E	SCE	SDG&E	SoCalGas
<i>When does a low-income customer receive a smart thermostat?</i>	In general, if an ESA customer has a forced air unit and does not already have a smart thermostat	When a contractor has determined the home is eligible and a smart thermostat is feasible to install.	All ESA participants are eligible for a Smart Thermostats unless they meet one of the non-feasibility criteria identified in the IS Manual.	When a contractor has determined the home is eligible and a smart thermostat is feasible to install.
<i>What % of 2022 customers served received a smart thermostat?</i>	19%	6.7%	1.4%	8%
<i>Do you offer smart thermostats in all climate zones?</i>	Yes	Yes. Limited based on budget availability	Yes	Yes
<i>Do you use the IS Manual requirements to identify eligible customers?</i>	Yes, PG&E applies the requirements in the IS Manual to identify measure feasibility and installation requirements. Customer eligibility can be found in Section 2 of the Policy and Procedures Manual.	Yes. The IS Manual is primarily used to identify measure feasibility and installation requirements.	Customers eligible to receive this measure are determined through the in-home assessment process. The program utilizes the IS Manual requirements to identify if the property is ineligible for a smart thermostat installation based on the non-feasibility criteria for this measure.	Yes, although the IS Manual is primarily used to identify measure feasibility and installation requirements. Customer eligibility can be found in Section 2 of the Policy and Procedures Manual.



PSPS Ongoing Activities

Low Income Oversight Board Meeting

September 29, 2022

WebEx



Different Types of Safety Outages

Public Safety Power Shutoffs (PSPS)

Turning off power to prevent tree branches and debris from contacting energized lines



WHEN

During times of high winds, low humidity and dry vegetation



NOTIFICATIONS

In advance through automated calls, texts, and emails along with real-time updates



2022 FOCUS

Continuing to refine the program and reducing impacts in the areas at highest risk

Enhanced Powerline Safety Settings

Settings quickly and automatically turn off power if a problem is detected on the line



WHEN

Elevated wildfire risk is present, most likely from May to November, but can occur year-round



NOTIFICATIONS

Customers receive notifications at the start of an outage, and regular updates; since power is automatically shut off within one-tenth of a second, we are unable to provide advanced notice

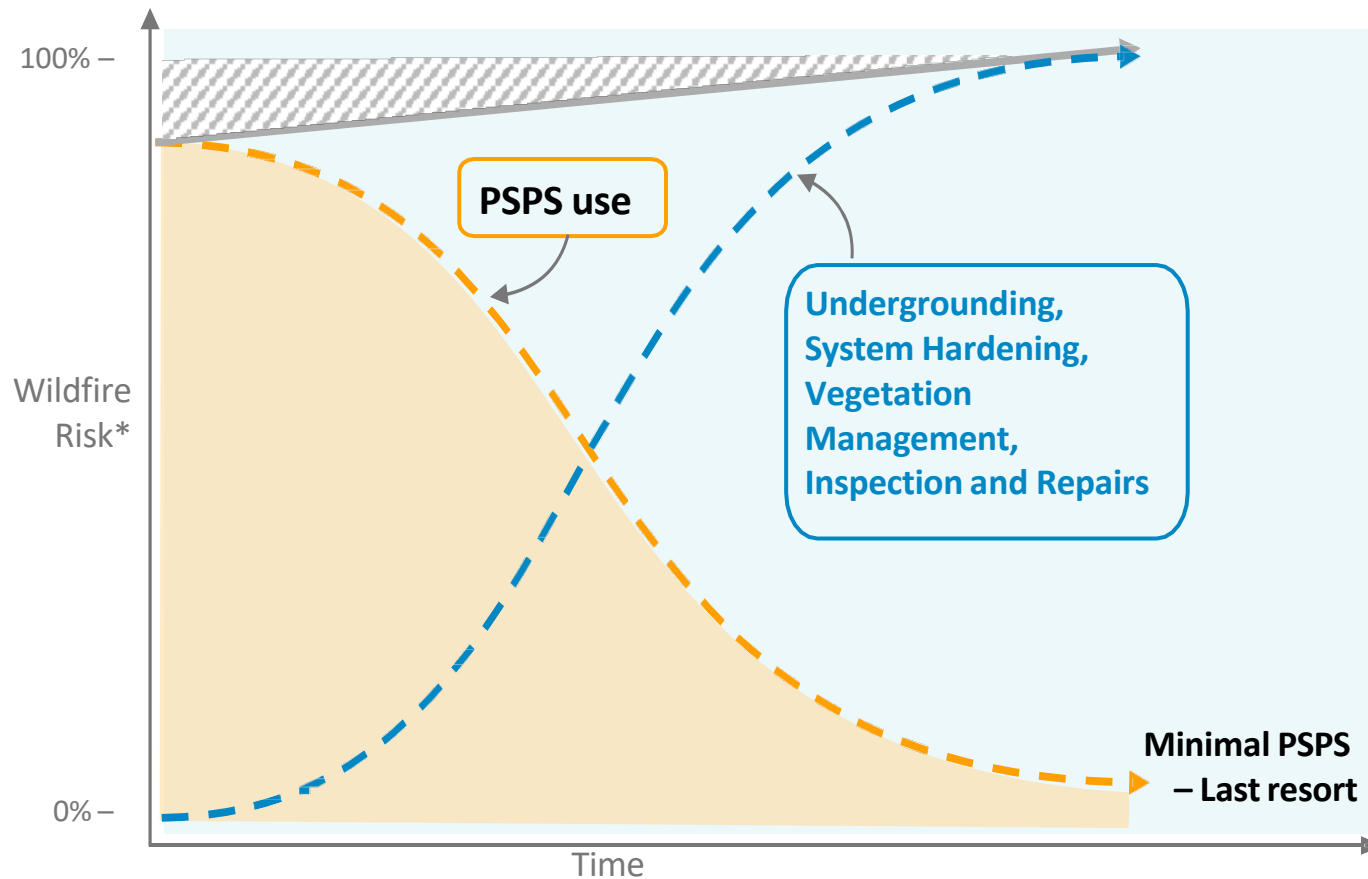


2022 FOCUS

Expanding from approximately 45% HFTD to 100% of HFRA circuits

Improving PSPS

As we work to build the electric system of the future, with efforts like undergrounding and system hardening, PSPS as a measure of last resort will continue to decline.



PSPS impacts have declined significantly through new, advanced technologies and improvements to the electric system infrastructure.

	2019	2020	2021
PSPS Outages	7	6	5
Customers Impacted	2,014,000	653,000	80,400
Damage/Hazards	722	257	442
Average Outage Duration (Hours)	43	35	31
Average Restoration Time (Hours)	17	10	12

Data is approximate

*Based on applying current PSPS protocols to catastrophic wildfires between 2012 and 2020, resulting in mitigating 96% of the structures impacted.



Resources To Help Customers Prepare

- **Community Resource Centers:** Providing a safe location to meet basic power needs and access information and essential items during a PSPS.
[Pge.com/crc](https://pge.com/crc)
- **Food Resource Partnerships:** Helping customers access food replacement packages and delivering nutritious meals to seniors.
[Pge.com/disabilityandaging](https://pge.com/disabilityandaging)
- **Portable Battery Program:** Supporting customers with fully subsidized portable battery solutions.
[Pge.com/pspresources](https://pge.com/pspresources)
- **211 Partnership:** Delivering 24-7 free confidential support and resources via calls or texts. 211ca.org
- **Kids Emergency Safety Site:** Educating kids in grades K-6 about emergency safety.
[Kidsemergency.com](https://kidsemergency.com)
- **California Foundation for Independent Living Centers:** Providing qualifying customers with access to hotel stays, food stipends and more. [Cfilc.org](https://cfilc.org)
- **Generator and Battery Rebate Program:** Offering rebates for eligible customers to purchase a qualifying generator or battery.
[Pge.com/backuppower](https://pge.com/backuppower)
- **Safety Action Center:** Sharing tips to help customers prepare for wildfire season, including how to build an emergency kit and plan.
[Safetyactioncenter.pge.com](https://safetyactioncenter.pge.com)
- **Wildfire Safety:** Providing information and support for our wildfire prevention efforts.
[Pge.com/wildfiresafety](https://pge.com/wildfiresafety)

2022 SCE PSPS OVERVIEW



January –
September

Statistics	Activations	Customer Interruptions	Circuit Interruptions	Customer Minutes of Interruption
2022 Fire Season	3	209	2	~208,000

MITIGATING IMPACTS OF PSPS

Customer Care Programs

2022 COMMUNITY CARE RESOURCES

67 COMMUNITY RESOURCE CENTERS (CRC)

Contracted and available based on potential shutoff locations. Location and hours listed online before shutoffs

8 COMMUNITY CREW VEHICLES (CCV)

Can be deployed rapidly for remote locations. Location and hours listed online before shutoffs

8 RESILIENCY ZONE SITES

Enable backup power generation at certain essential sites in remote communities



Thanksgiving Day, 2021

9 RESILIENT CRCs

CRCs that have or are in the process of installing a transfer switch and/or have a backup generator

BACKUP POWER SUPPORT

- Critical Care Battery Back-up (CCBB) program provides a free portable back-up battery and solar panel for charging to eligible customers. Expanded the program in August 2022 to include additional customers. Since program inception, more than 8k batteries have been delivered through the program.
- \$75 rebate for portable batteries for customers in HFTDs to power devices and appliances. Beginning September 1st, SCE will increase the rebate amount to \$150.
- \$200 rebate for portable generators for customers in HFTDs
- \$500 rebate for portable generators for customers in HFTDs and enrolled in CARE/FERA or Medical Baseline Allowance. Beginning September 1st, SCE will increase the rebate amount to \$600.
- Statewide Self-Generation Incentive Program (SGIP)

2022 ACHIEVEMENTS

- Dedicated Access & Functional Needs (AFN) Liaison on the PSPS Incident Management Team
- Deployed 7,579 free portable backup batteries (CCBB)
- Provided 959 Portable Power Station Rebates
- Provided 681 Portable Generator Rebates

AFN Expanded Support in 2022



Data + Automation

Data-driven, leveraging digital factory bots & automation to identify & target customers.



PSPS Support

Identifying insulin/medicine cooler bags for distribution through community partners in HFTD.



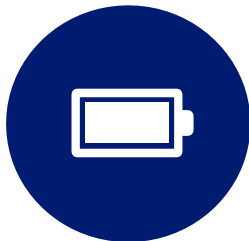
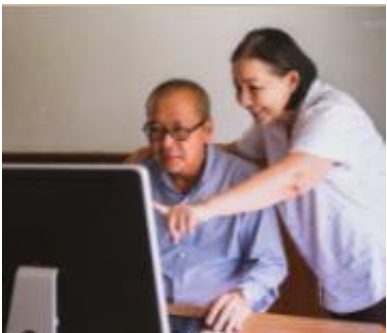
Accessibility

Launched portal with Deaflink to semi automate process for accessible custom notifications.



Community Partners

~16 Joint IOU and local resiliency, PSPS support services & wildfire preparedness trainings. New partnerships with Rural Health & Safety Collaborative Groups.



Generators

No cost Portable Power Station for qualifying individuals of MBL & AFN. Rebates \$300 & \$100 available.



Marketing + Research

PSPS preparedness & support services direct mail campaign to Multifamily Dwellings and Modular Home Parks in HFTD

AFN PSPS Support



Centralized Resource Hub

211 San Diego and 211 Orange County connect customers to resources and direct support from 1,000+ orgs (24/7/365, in 200+ languages)



Community Resource Centers

Enhanced support including privacy screens, signage, dedicated parking and on-site ASL interpretation



Tribal Communities

Southern Indian Health Council (SIHC) & Indian Health Council (IHC) partners provide resiliency items, generators and other needs to tribal communities



Food Support

SD Food Bank & Feeding SD partners provide mobile food pantries at rural, tribal and PSPS sites, with warm food provided as needed



Transportation

FACT paratransit partnership provides accessible transportation to customers' location of choice



Hotel Stays

Salvation Army partnership provides no-cost hotel stays



Wellness Checks

CERTS and YANA provide wellness checks to those who may need support



Post-Moratorium Extension

Continued Customer Support



- socalgas.com/Coronavirus continues to be updated, providing customers with a reference hub as new programs and payment plan assistance may become available.
- Disconnections for residential customers are not anticipated until Q2 2023
- Additional updates will be made as needed.



State of Disconnections and Arrearage Management Plans (AMP)

Low Income Oversight Board Meeting

September 29, 2022

WebEx

PG&E Disconnections Status and AMPs

Arrearage Management Plan (AMP)

- Number of customers enrolled: 166K
 - Percentage of eligible households enrolled: 61%
 - Number successfully completed 12-month program launched in Feb. 2021: 2,569
- Total arrearages: \$265M
- Total amount forgiven: \$98M

*Updated 9/1/2022

Disconnections

Number of disconnections, CY 2021 – YTD 2022: Zero

Residential credit collection notices resumed in late July 2022.

*Updated 8/19/2022

AMP Case Management

To support customer success in AMP, PG&E continues to conduct outbound calling campaign to customers with missed payments.

AMP missed payment outreach (outbound calls)

- 2021 – 111,020 calls completed
- 2022 (YTD)* – 58,826 calls completed
 - TOTAL: 169,846



AMP eligible customer outreach (outbound calls)

- 2021 – 49,846 calls completed
- 2022 (YTD)* – 18,996 calls completed
 - TOTAL: 68,842



*Updated 9/1/2022

SCE Disconnections Status and AMPs

Arrearage Management Plan (AMP)*

- Number of customers enrolled: 24,062
 - Percentage of eligible households enrolled: 34%
 - Number successfully completed 12-month program launched in Feb. 2021: 3
- Total arrearages: \$32.7M
- Total amount forgiven: \$13M

*Updated 9/7/2022

Disconnections

Number of disconnections, CY 2021 – YTD 2022*: Zero

Resumption of residential credit collection efforts expected to begin ~Q3 2022.

*Updated 9/7/2022

AMP Case Management

To manage customer satisfaction in AMP, SCE has implemented an outbound calling initiative to customers who have gone on the NEM tariff and no longer eligible to participate in AMP in order to provide those customers with other options to assist with their arrearage balances.

SCE has also began another initiative to reach out to customers who are experiencing delayed billing and provide accommodations where needed.

AMP NEM outreach (outbound calls)

- 2022 (YTD)* – 197 calls completed



AMP Delayed Billing outreach

- 2022 (YTD)* - 2,279 letters mailed



*Updated 9/7/2022

SDG&E Disconnections Status and AMPs



Arrearage Management Plan (AMP)*

- Number of customers enrolled: 13,656
 - Percentage of eligible households enrolled: 37%
 - Number of customers successfully completed 12-month program: 1,990
- Total arrearages actively enrolled in AMP: \$14.5M
- Total amount forgiven: \$9.3M

*As of 7/31/2022

Disconnections

Number of disconnections, CY 2021 – YTD 2022*: Zero

At this time SDG&E is still evaluating when normal residential credit and collection activities will begin.

*As of 7/31/2022

AMP Marketing

Targeted Communications

- Dedicated AMP email to 30k AMP eligible customers
- Included AMP messaging in
 - CARE-eligible monthly bill comparison email
 - COVID-19 Customer Protections communications
 - CARE/FERA recertification backlog communications

General Outreach

- Organic social media posts (Facebook, Instagram, Nextdoor)
- Added AMP messaging on sdge.com/assistance
- Bill inserts & bill package
- Continued program education through SDG&E's Energy Solutions Partner Network, comprised of 200+ CBOs.

SoCalGas Disconnections Status and AMPs



Arrearage Management Plan (AMP)*

- Number of customers enrolled: 103,675
 - Percentage of eligible households enrolled: 33%
 - Number successfully completed 12-month program launched in Feb. 2021: 24,464
- Total arrearages: \$61.7M
- Total amount forgiven: \$18.3M

*Data as of 8/31/2022

Disconnections

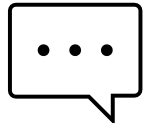
Number of disconnections, CY 2021 – YTD 2022*: Zero

Resumption of residential credit collection efforts expected to begin ~Q2 2023.

*Updated 9/16/2022

AMP Case Management

To support customer success in AMP, SoCalGas implemented a text and email campaign targeting customers with missed payments



AMP missed payment outreach

- June Pilot launched to test the effectiveness of digital communications
- 4,400 Accounts received notifications
- Observed an overall increase of 11% in payments received
 - Timing of the pilot and the bill dates played a significant factor in success, with increases of 21% in payments received

AMP eligible customer outreach

- June Pilot launched to promote enrollment in AMP
- 27,000 customer accounts targeted
- ~4K customers (14%) enrolled in AMP, resulting in \$2.1M in forgiveness
- Monitoring for continued effectiveness and plan completion



*Updated 9/16/2022

Lunch

Item 7: CSD Updates

2022 California Arrearage Payment Program (CAPP) Update

Coordination Report on Low Income Weatherization Program (LIWP)

Board Member Jason Wimbley, CSD

Item 8: CPUC Standing Reports

1:15 – 2:15 PM

- Water Division
- Energy Division
- Legislative Update

Water Utilities Update

Low – Income Oversight Board

Water Division

September 29, 2022

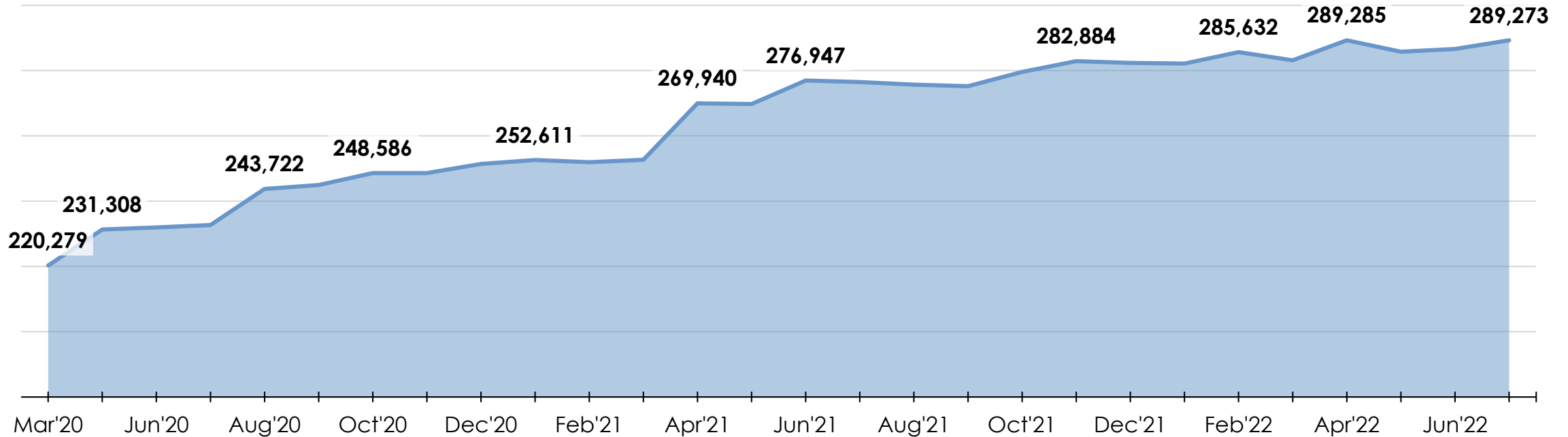


**California Public
Utilities Commission**

Overview

- Customer Assistance Program (CAP) Enrollment
- Conservation
- Water Utility Acquisitions Proceeding

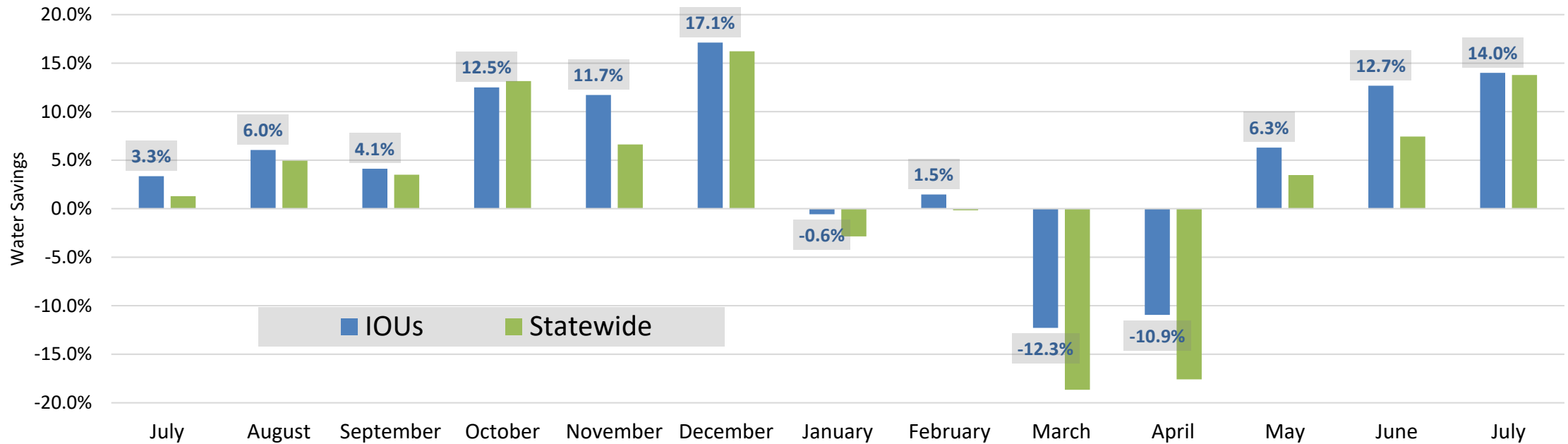
Total CAP Enrollment



- Currently, 24% of total IOU residential customers enrolled in CAP
- 2 of 4 Data Exchanges with Energy IOUs completed

Water Usage Conservation

Investor-Owned Water Utilities



- Governor's call for Voluntary 15% reduction began in July 2021
 - Compared to 2020 usage
- **Water IOUs** currently saving **6.0%** combined since July 2021
 - Statewide: 3.4%

Order Instituting Rulemaking R.22-04-003

Water Utility Acquisitions

- Prehearing Conference was held on Aug 5th
- Scoping memo will be issued soon
 - Review and improve upon the existing framework from 1999
- Total of 4 workshops planned
 - 1st workshop tentatively scheduled for December
 - Focus: Inadequately Operated & Maintained Systems

Low Income Oversight Board Energy Division Update

Presented by Kapil Kulkarni, Energy Division Staff
September 29, 2022



California Public
Utilities Commission

Agenda

- Large IOUs ESA/CARE/FERA program cycle
 - IOUs 2022 ESA reporting
 - ESA Working Group
 - Program solicitations
- Low Income Needs Assessment

Large IOUs ESA/CARE/FERA program cycle

- **Reporting**

- August monthly reports are now available, with new reporting on customer segment data and program metrics.

- **ESA Working Group**

- October 2022
 - Agenda being developed now
 - Potential and Goals (P&G) study overview
- December 2022 – discuss mid-cycle process
- January 2023 – discuss 2022 year end update
- Materials available at <https://pda.energydataweb.com>

Large IOUs ESA/CARE/FERA program cycle – upcoming activities

- Solicitation process for potential bidders
 - Conclusion of solicitations for various ESA program components
 - Contract awards and program launch beginning for IOUs and winning bidders
 - More information available at the IOUs' solicitations websites, and www.caeecc.org
- All proceeding documents, including monthly reports, are 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.

Large IOUs ESA/CARE/FERA program cycle

- ESA program solicitations – timeline

Energy Savings Assistance Program Solicitations Schedule ALL DATES ARE SUBJECT TO CHANGE*		September				October					November				December				
		9/5	9/12	9/19	9/26	10/3	10/10	10/17	10/24	10/31	11/7	11/14	11/21	11/28	12/5	12/12	12/19	12/26	
3	SCE	Clean Energy Home Pilot			Contract Awards and Issuance/Program Launch		Program Ramp Up								Open to Participation (Tentative)				
10		ESA Plus/Deep Implementation Pilot (Joint SCE/SCG)**	Program Ramp Up								Open to Participation 11/9								
11		ESA Plus/Deep Evaluation Pilot (Joint SCE/SCG)**	Contract Awards and Issuance/Program Launch		Program Ramp Up						Open to Participation 11/9								
12		Building Electrification and Clean Energy Homes Pilot Evaluation				Contract Awards and Issuance/Program Launch		Program Ramp Up									Open to Participation (Tentative End Q4 2022)		
13		Interactive Energy Education Note: This timeline is preliminary and subject to change based on future program needs being identified.	Proposal Release, Bidders Conference and RFP Proposal Due date (TBD)			Bid Evaluation and Scoring (TBD)			Contract Negotiations (TBD)				Contract Award/Issuance (TBD)		Program Ramp Up (TBD)				
14	SoCalGas	Main ESA (Basic/Plus) Program (delivery of core single-family in-home services)	Contract Negotiations							Contract Awards and Issuance/Program Launch									
16		Customer Experience Technology Platform and Customer Online Audit	Contract Negotiation Bidder Notifications; Contract Package Prep					Contract Negotiations					Contract Awards and Issuance						
17		Main ESA (Basic/Plus) Program	Program Transition Period																
18																			
19		Multifamily Whole Building Program	Contract Negotiations										Contract Awards/ Issuance ⁽⁴⁾		AL Submission 11/30/22		ED Review of A		
20																			

Questions?

2022 Low Income Needs Assessment

Current Activity

- Draft report posted by October 19, 2022
- Draft report will be presented at LIOB public meeting October 25, 2022

Upcoming Activity

- Comments on draft report due November 14, 2022
- Response to comments will be posted November 21, 2022
- Final report will be released by December 31, 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												

Thank you!

Kapil Kulkarni, Energy Division

Kapil.kulkarni@cpuc.ca.gov

213-620-6453



California Public Utilities Commission

Legislative Bill Update – Office of Governmental Affairs

*Bills of Interest to the Low-Income Oversight Board Quarterly Meeting – Thursday
September 29th, 2022*

The 2021-2022 Legislative Session concluded on August 31st. As summarized below, several bills of interest to the Low-Income Oversight Board (LIOB) passed and have been presented to the Governor. The last day for the Governor to sign or veto bills passed by the Legislature is September 30th.

1. Assembly Bill 2316 (Ward) - Public Utilities Commission: customer renewable energy subscription programs and the community renewable energy program.

Requires the CPUC to evaluate existing customer community renewable energy programs in order to modify and/or terminate these programs. This bill also requires the CPUC to determine whether it is beneficial to ratepayers to develop a new or modify a tariff or program for community renewable energy by an electrical corporation, based on specified criteria, including ensuring at least 51% of the energy capacity serves low-income customers.

Status: *Passed; Enrolled and presented to the Governor on September 9th*

2. Assembly Bill 2750 (Bonta) - Department of Technology: state digital equity plan

This bill would require the Department of Technology (CDT), by January 1, 2024 and in consultation with the public, the CPUC, and the California Broadband Council, to develop a state digital equity plan. The bill would require the plan to include, among other things, the identification of barriers to digital equity faced by specified populations, including, among other barriers, the availability and affordability of access to fixed and wireless broadband technology.

The bill would additionally require the plan to include measurable objectives for documenting and promoting digital equity among those populations and an assessment of existing digital navigator programs. The bill would require the CDT, to the extent practicable, to obtain all available federal funding for purposes of developing and implementing the plan.

Status: *Passed; Enrolled and presented to the Governor on August 31st*

3. Senate Bill 1020 (Laird, Caballero, Durazo, and Atkins) - Clean Energy, Jobs, and Affordability Act of 2022.

This bill requires new interim targets for renewable and zero-carbon resources to supply 90% of all retail sales of electricity by December 31, 2035; 95% of all retail sales of electricity by the end of 2040; and 100% of electricity procured to serve all state agencies by December 31, 2035.

This bill requires the CPUC, in coordination with the California Energy Commission (CEC) and the California Air Resources Board (CARB), to issue a joint reliability progress report reviewing system and local reliability, with a focus on summer reliability and energy and capacity procurement progress.

This bill also requires the CPUC to develop a definition on energy affordability and to use energy affordability metrics and affordability thresholds develop protections, incentives, discounts, or new programs to assist customers facing disconnections and to assess the impact of proposed rate increases on different types of residential customers.

Status: *Passed; Enrolled and presented to the Governor on September 2nd*

4. Senate Bill 1208 (Hueso) - Low-income utility customer assistance programs: concurrent application process.

This bill requires the CPUC, on or before June 30, 2024, in coordination with other relevant state agencies, that provide low-income electric or gas utility customer assistance programs, to develop a process that enables customers to concurrently apply, or begin to apply, to multiple low-income customer assistance programs.

This bill also requires the Low-Income Oversight Board (LIOB) to report to the Legislature on opportunity and process for expanding the third-party administrator (TPA) contract used for the California LifeLine program for purposes of facilitating enrollment between electric, water, gas, and communications low-income assistance programs.

Status: *Passed; Enrolled and presented to the Governor on September 13th*

5. Senate Bill 1213 (Hueso) - Public Utilities Commission and State Energy Resources Conservation and Development Commission: public outreach: community-based organizations

This bill would require the CPUC and CEC to collaborate to develop and maintain a list of community-based organizations to help ensure adequate public outreach regarding available programs and incentives. The bill also would require the CPUC and CEC to work with existing committees, boards, and community-based organizations in developing the list.

Status: *Passed; Enrolled and presented to the Governor on September 6th*

Break

LIOB CBO Arrears Case Management Pilot Overview

Presenters: Claire Coughlan and Tom Knox

September 29, 2022





CBO Arrears Case Management Pilot Decision

D. 22-04-027 CBO Arrears Case Management Pilot proposed to address current gaps in assisting customers:

1. Case Management
2. Targeting by Geography and Community Type
3. Navigating the Numerous Relief and Assistance Programs

Proposed Decision Requires:

- PG&E to convene a CBO Pilot Working Group to guide and oversee the development of the CBO Case Management Pilot as well as select a CBO to co-lead.
- The Pilot Working Group shall propose a budget, payment structure, and evaluation method for the CBO Pilot
 - IOUs shall produce a single statewide database and map of CBOs, to be updated quarterly
 - CBO Working Group shall develop and finalize a proposal for budget, contract administration plan, payment structure, and evaluation plan for CBO Arrears Case Management Pilot
 - CBO Working Group shall file a proposal for CBO Arrears Case Management Pilot Program in the docket of Rulemaking 18-05-007,

CBO Pilot: Proposal Overview

Pilot Size

12,000 Participants

- 4,800 PG&E customers
- 4,800 SCE & SoCalGas customers
- 2,400 SDG&E customers

Eligibility

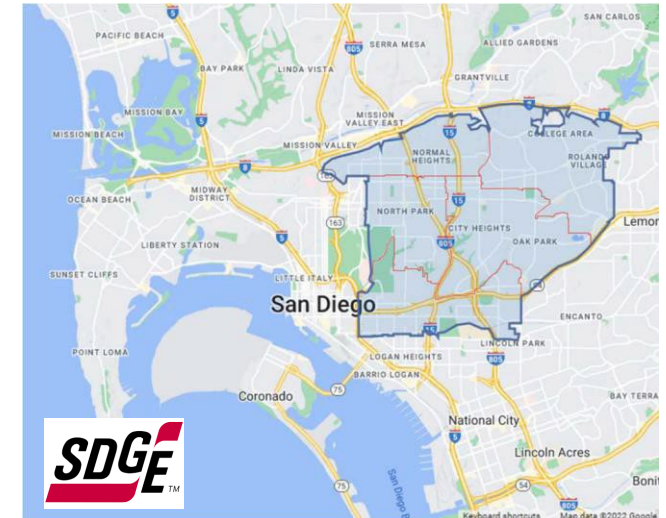
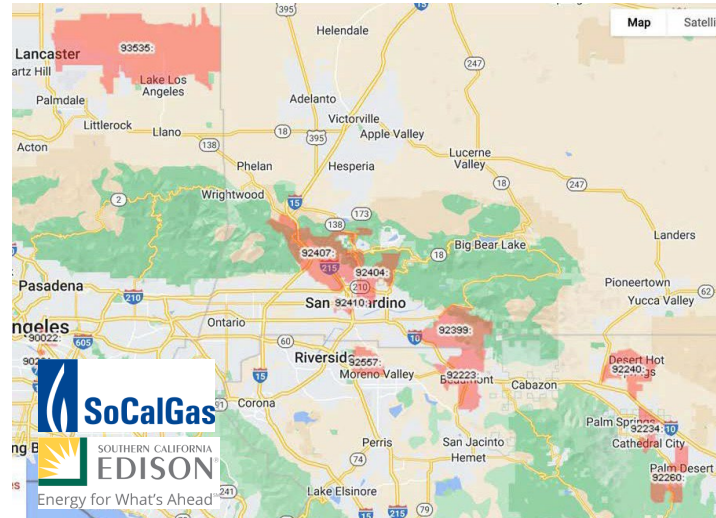
Participating customer criteria:

- Reside in a target zip code (AR 20)
- Have arrears at least 90 days old and may be at risk for disconnection
- No income qualifications- any income level will qualify

Pilot Design

Multi-tiered Case Management Approach to reduce customer arrears:

- **Tier 1 Services** (*months 1-3*)
 - Basic energy education, financial training and best practices
 - Immediate program relief (AMP, LIHEAP, etc.)
 - Negotiation of payment plans (if necessary)
 - Refine and continue customer assessment and action plan
- **Tier 2 Services** (*months 4-6*)
 - Continued energy education, financial training and best practices
 - Enrollment in additional energy management programs (ex. EE, DR, etc.)
 - Renegotiation of payment plans as necessary
- **Tier 3 Services** (*months 7-12*)
 - Evaluation of progress out of debt
 - Consideration of any changes in circumstances, impacts on action plan, necessary revisions
 - Reinforced energy education, sound financial practices and energy usage behavior
 - Monitoring at an agreed frequency based on customer specific situation





CBO Pilot: Cost/ Payment Structure Overview

CBO Payment Structure

Payment Structure:

- *Upfront grant* not to exceed 30% of 2-year contract amount
- *Monthly payments* for each customer enrolled in pilot
- *Monthly case management fee* for each enrolled customer

Additional Details:

- Upfront grant payment to cover pilot pre-planning and set up costs
- CBOs may request upfront payment in solicitation process

Total Proposed Budget

Category	PG&E	SDG&E	SoCalGas	SCE	Total
Case Management Planning/ Overhead	\$80,000	\$40,000	\$40,000	\$40,000	\$200,000
CBO Outreach, Customer Enrollment and Reporting	\$1,100,000	\$550,000	\$550,000	\$550,000	\$2,750,000
Case Management Services and Reporting	\$2,220,000	\$1,110,000	\$1,110,000	\$1,110,000	\$5,550,000
Total Arrearage Case Management CBO Services	\$3,400,000	\$1,700,000	\$1,700,000	\$1,700,000	\$8,500,000
EM&V	\$400,000	\$200,000	\$200,000	\$200,000	\$1,000,000
ME&O	\$185,000	\$50,000	\$60,000	\$60,000	\$355,000
Administration*	\$415,000	\$400,000	\$120,000	\$450,000	\$1,385,000
Total IOU Marketing, Evaluation and Administration	\$1,000,000	\$650,000	\$380,000	\$710,000	\$2,740,000
Grand Total	\$4,400,000	\$2,350,000	\$2,080,000	\$2,410,000	\$11,240,000

* Administration budget includes costs for a Single Point of Contact to support CBOs with specific customer account resolution issues



CBO Pilot: Reporting Overview

CBO Reporting Requirements

Proposed monthly reporting metrics include:

- Number of customers in the sample group
- Number of pilot customers contacted through outreach by each CBO
- **Number of signed customer participation agreements**
- **Number of customers enrolled in each service level tier**
- **Number of completed case management action plans**
- Number of customers who have completed the first six months of the case management program
- Number of customers who have completed the twelve months of the case management program
- **Number of customers that unenrolled (or withdrew) from the case management program**
- **Number of disconnections from pilot program enrolled and unenrolled customers**
- Total and average number of programs recommended per customer
- **Total and average number of programs enrolled in per customer** (based on customer self-report)
- Number of customers enrolled/confirmed enrolled in each program
- Average LIHEAP Cash Relief per customer
- Participating customers' arrearage status:
 - Arrearage at the time of the signed participation agreement compared to subsequent arrearage by each month-end
 - Calculate pilot program aggregate and per account difference:
 - Increased arrearages, by dollar and percentage of accounts
 - Same/reduced arrearages, by dollar and percentage of accounts

IOU Reporting Requirements

Metric	Frequency
For pilot program accounts, report using Disconnection OIR (R.18-07-005) Report Section-3 format, by number of accounts, day, and amount owed. First report to be filed the month following the close of the enrollment period – enrollment period lasts 6 months. This locks in the list of pilot participants for consistency of reporting*	Monthly
Number and dollar amount of ALL customers facing arrears 12 months after pilot initiation, per CBO geographic location, exclude pilot accounts	Annual
Number and dollar amount of targeted customers facing arrears 12 months after pilot initiation, per CBO geographic location, exclude pilot accounts	Annual
Number and dollar amount of pilot accounts (i.e., signed participation agreements) facing arrears 12 months after pilot initiation, per CBO geographic location (Pilot accounts only)	Annual
Number and percentage of pilot accounts successfully complete the Case Management Service and eliminate all arrearage, within 12 months of case management services	Annual
Number of pilot accounts successfully remain current on energy bills, after 24 months	Annual
Number and dollar amount of pilot accounts that are part of the arrearage again, after 24 months	Annual
Number and percentage of pilot customers who successfully reduced arrearage but did not eliminate all debt, after 12 months of case management services	Annual
Number and percentage of pilot customers with no change, withdrew from the pilot or increased arrearage, after 12 months of case management services	Annual



CBO Pilot: Evaluation Proposal

High Level Scope

Conduct Data Assessment	<ul style="list-style-type: none">Identify data needs, recommend data collection and management processes for IOUs and CBOS
Perform Impact Evaluation	<ul style="list-style-type: none">Conduct baseline assessmentConduct quasi-experimental design comparing participants and non-participantsConduct evaluability assessments
Perform Process Evaluation	<ul style="list-style-type: none">Design and launch surveys with customers, CBOs, stakeholdersIdentify improvement opportunitiesCompare case management effectiveness across CBOs

Evaluation Goals

1. Assess if case management is effective in reducing arrearage and level of disconnection
2. Pilot participants will be compared to similar control group of non-participants to gauge impact of participation
3. Determine if quantitative and qualitative benefits sufficiently outweigh costs to warrant program expansion.
4. Determine which interventions or combination of interventions are effective in arrearage and disconnection reductions.
5. Recommend if case management pilot should expand in scale beyond the pilot phase.

Item 10: Subcommittee Reports

2:45 – 3:10 PM

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

LIOB LIEAP Subcommittee 09132022 SCE (ESA) Program & Budget Status Update Summary

Benito Delgado Olson, Maria Stamas, Pat Watts, Jason Wimbley, Lourdes Medina, Paul Irwin, Lisa Castilone, and Valarie Hernandez

Robert Castaneda, Low Income Energy Assistance Programs Subcommittee Chairman

Commissioner Genevieve Shiroma, Chery Wynn, Kapil Kapurni

September 22, 2022

LIOB LIEAP Subcommittee 09132022 SCE Summary

A personal note: I want to personally thank all who attended and contributed to a most important discussion of issues regarding SCE's ESA program and budget. The following is an itemized listing of issues raised and discussed. They are:

Adding, Modifying & Removing ESA Main Measures

There was discussion as to the need for a clear and concise protocol (as delineated in ESA/CARE/FERA Decision) regarding ESA main measure offerings and the dismissal of program measures. Whereas the Commission previously retained approval for measure-related changes, the IOUs now possess authority to institute these changes after **collaboration** with the ESA Working Group and providing notice through their monthly filing. SCE is requested to adhere to this process of collaboration with the ESA Working Group and to provide notice of ESA measure changes via their monthly filing. This process ensures transparency and inclusion as envisioned by the Commission. Collaboration with the ESA Working Group consisting of program stakeholders, contractors and participants and is part of the public record. This process allows the IOUs to evaluate, revise and modify measures to best meet the goals of the Decision and the low-income customer. This process, its findings and conclusions should also be published in the respective IOU monthly reports. It is further advised that this matter be discussed, defined and a formal process assigned by the ESA Working Group.

Improved Communication

The subcommittee opined that two-way communication is in the best interests of the ESA Program and the populations ESA serves. Many of the ESA contractors have been with the ESA program for over two decades and know the program metrics and the eligible communities and their needs very well. Their experience is valuable, and it should be harnessed to make the ESA program as effective and efficient as possible. It is recommended that Southern California Edison should immediately establish means of effectively communicating plans for completing the transition to the 2023 ESA, including fulfilling service commitments to enrolled customers and forecasting program service delivery for the remainder of the 2022 program cycle to best position the existing ESA workforce to meet remaining 2022 service objectives.

LIOB Oversight

The full LIOB should discuss and determine IOU reporting metrics and benchmarks to inform the board of their respective transitional plans and program impacts at its quarterly meetings. Subject matter should include, but not limited to, ESA program transition plans, real or potential program disruptions, timetables for new program elements, the dismissal of measures and why, status of the ESA workforce, affordability impacts, to date allocation of funds and funds that are spent and unspent.

ESA Budget Flexibility

The Decision restricts ESA Main budget dollars to the appropriated fiscal year not allowing for financial/budget flexibility. Unforeseen impacts given increased customer demand and growing wait lists have resulted in SCE ceasing to enroll new customers via their outreach and enrollment contractors. The ESA workforce - specifically in the Southern California Edison territory – has seen significant layoffs and program disruptions due to a significant transition into the new program. The CPUC should address this issue with a stable, flexible, and sustainable funding stream that appropriately finances ESA operations to ensure that eligible customers are served, and the ESA workforce is part of this transition to the new program.

Clarification As to The Installation Of “All Feasible Measures” In The ESA Program As Delineated In PUC Code 2790.

This clarification by the Energy Division will significantly aid the IOUs in establishing program deliverables that best meet the needs and requirements of the customer and program compliance. Absent clarification as to the determining process of “all feasible measures” it will be next-to-impossible to know what customers are eligible to receive. Clarification of an all feasible measures set of guidelines will avoid arbitrary and subjective decision making on behalf of the program and our customers.

Mitigating Service Impacts to Customers

Southern California Edison should recalibrate its 2022 ESA budget to ensure sufficient funding remains to honor service commitments to Edison customers with expressed interest in ESA services and enrolled in the program. Edison should pursue all administrative options at its disposal to render timely service response to these customers, preferably by the conclusion of the 2022 program cycle.

ESA Workforce Contracting

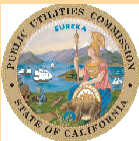
Southern California Edison should structure contracts with ESA service providers in a manner that expressly defines services delivery, budget, and service work expenditures by specific time periods covering the entire span of the ESA annual contract cycle. This method of calibrating contractor budgets, service delivery, and reimbursement payments will enable ESA contractors to better manage its program operations and operating expenses over the course of the entire program year cycle and lull periods due to accelerated performance by a contractor.

CPUC

The 2023 ESA program cycles marks a critical point for enhancing ESA measuring offerings and service investment in qualified dwellings, this, combined with recent eligibility expansion for ESA, the CPUC shall establish of annual and multi-year market penetration goal achievement across all IOUs. In addition, the CPUC should define metrics to effectively measure first-year implementation of the 2023 program design in order derive new baselines for average service investment.

Item 11: Future Quarterly LIOB Meeting Options

3:10 – 3:15 PM



California Public
Utilities Commission

Item 12: Technical Advisory Committee

Board Chair Delgado-Olson & Board Member Wimbley

3:15 – 3:20 PM



**California Public
Utilities Commission**

Item 13: Wrap Up & Closing Remarks

3:20 – 3:30 PM

Save-the-date!

4th Quarterly Meeting - December 8, 2022



California Public Utilities Commission