



# 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**

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# 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.caeccc.org/energy-savings-assist-programs](http://www.caeccc.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 1<sup>st</sup> of every month. Any date changes are noted at the bottom of the schedule.

| Energy Savings Assistance Program Solicitation Schedule<br>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<br>Ordering Paragraphs of CPUC Decision D-21-06-015**               |  |   |   |                 |                 |   |       |                           |   |   |   |                                  |                 |                                  |                                  |  |       |       |  |
| Joint IOU Events  |  |   |   |                 |                 |   |       |                           |   |   |   |                                  |                 |                                  |                                  |  |       |       |  |
| SCE   | Main ESR (Basic/Plus) Program  | Central Regulations   |   |                 |                 |   |       |                           |   | Central Records and Incentives/Program Launch |   | Program Ramp Up                  |                 |                                  |                                  |  |       |       |  |
|   | ESR Equipment Vendors  |   | Central Regulations                           |                 |                 |   |       |                           |   |   | Central Records and Incentives/Program Launch |                                  | Program Ramp Up |                                  |                                  |  |       |       |  |
|   | ESR Integration  | Scoping   | Central Regulations                           |                 |                 |   |       |                           | Central Records and Incentives/Program Launch |   | Program Ramp Up                               |                                  |                 |                                  |                                  |  |       |       |  |
|   | Building Electrification Pilot   | Program Ramp Up   |   |                 |                 |   |       |                           |   |   |   |                                  |                 | Open to Participation (Finalist) |                                  |  |       |       |  |
|   | Class Energy Home Pilot  |   | Central Records and Incentives/Program Launch |                 | Program Ramp Up |   |       |                           |   |   |   |                                  |                 |                                  | Open to Participation (Finalist) |  |       |       |  |
|   | ESR Pilot/Design/Installation Pilot (Joint SCE/SCG)**  | Program Ramp Up   |   |                 |                 |   |       |                           |   | Open to Participation (Finalist)              |   |                                  |                 |                                  |                                  |  |       |       |  |
|   | ESR Pilot/Design/Installation Pilot (Joint SCE/SCG)**  | Central Records and Incentives/Program Launch                         |   | Program Ramp Up |                 |   |       |                           |   |   |   | Open to Participation (Finalist) |                 |                                  |                                  |  |       |       |  |
|   | Building Electrification and Class Energy Home Pilot Evaluation  |   |   |                 |                 | Central Records and Incentives/Program Launch |       | Program Ramp Up           |   |   |   |                                  |                 |                                  |                                  | Open to Participation (Finalist End 04/2022) |       |       |  |
|   | Interactive Energy Education Pilot: This initiative is preliminary and subject to change based on future program needs to be identified.   | Proposal Review, Bidder Conference and RFP Preparation Due Date (TBD) |   |                 |                 | Bid Evaluation and Scoping (TBD)              |       | Central Regulations (TBD) |   |   |   | Central Record/Incentives (TBD)  |                 | Program Ramp Up (TBD)            |                                  |  |       |       |  |
|   | SCE Update<br>Main ESR is subject to change based on program needs. The program needs to be identified. The program needs to |   |   |                 |                 |   |       |                           |   |   |   |                                  |                 |                                  |                                  |  |       |       |  |



# 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

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# CARE Program

PU Code Section 739.1(a) requires the CPUC to establish a program of assistance to low-income electric and gas customers with annual household incomes that are no greater than 200 percent of the federal poverty guideline levels.

## 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          |
| <b>Total</b>                                     | <b>\$39,408,893</b> | <b>\$18,280,486</b> |     | <b>\$1,007,016,676</b> |

| 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                  |
| <b>Total</b>             | <b>17,346,356</b>           | <b>4,574,693</b>             |               | <b>4,780,392</b>      |                 | <b>527,413</b>           |

\* 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



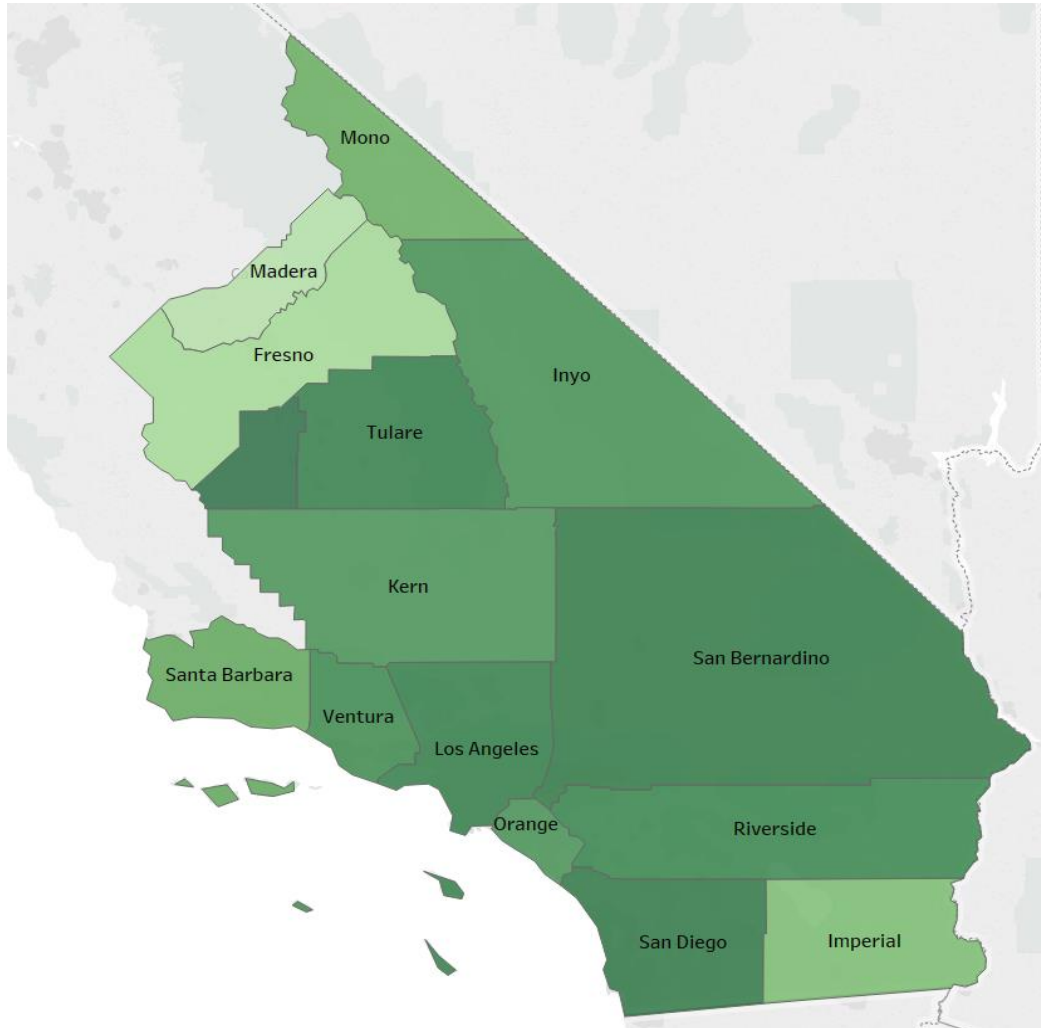
| PG&E Counties With Lowest Enrollment Rates |                  |
|--|------------------|
| County                                     | Enrollment Rate* |
| PLUMAS                                     | 59%              |
| MARIPOSA                                   | 62%              |
| CALAVERAS                                  | 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)

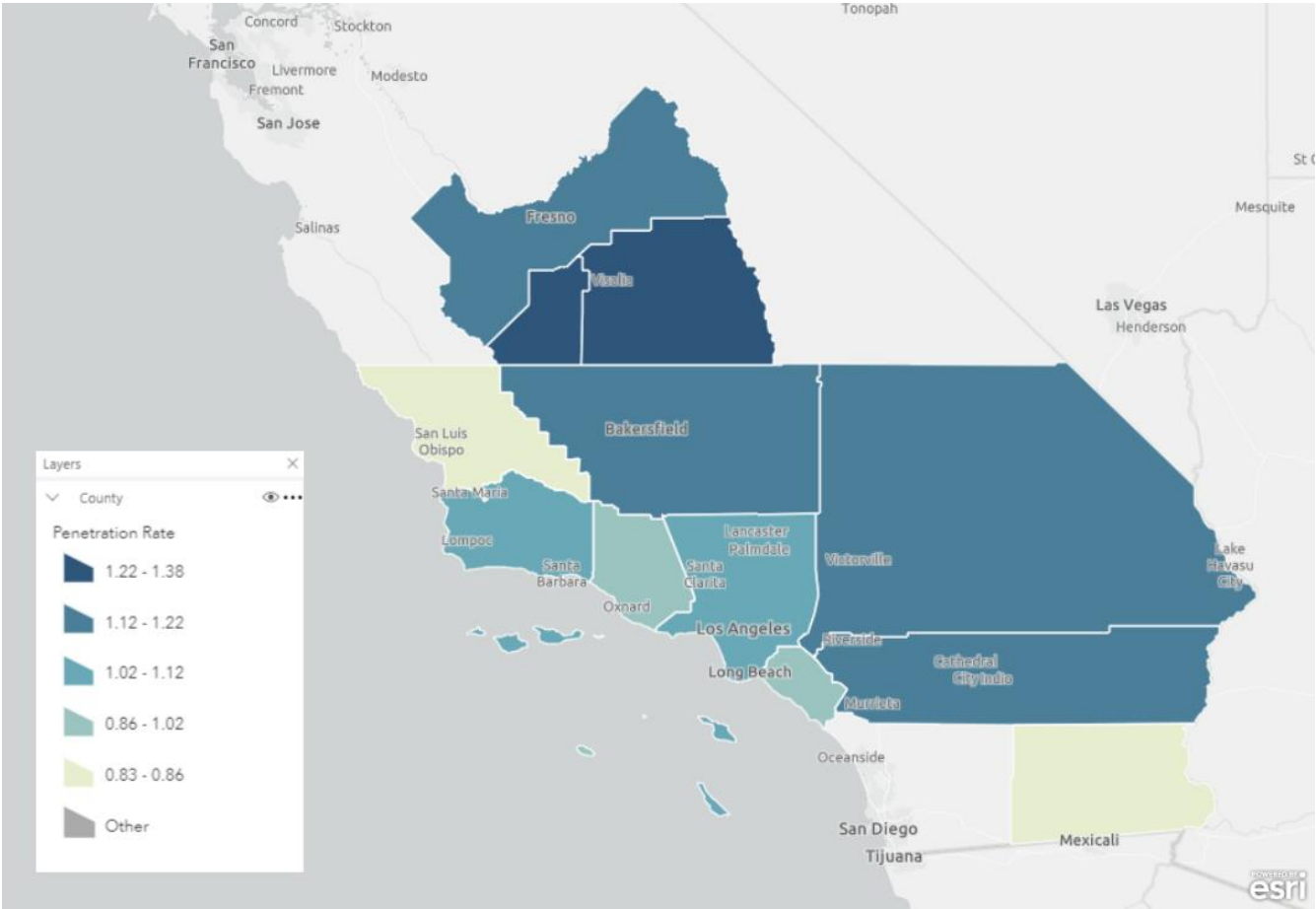
| City            | Enrollment Rate |
|-----------------|-----------------|
| Miramar         | 9%              |
| Rancho Santa Fe | 13%             |
| Mount Laguna    | 18%             |
| Coronado        | 33%             |
| Laguna Beach    | 36%             |
| Del Mar         | 50%             |

\*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         |
| <b>Total</b>                                 | <b>\$4,783,830</b> | <b>\$2,292,963</b> |     | <b>\$15,267,510</b> |

| 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                    |
| <b>Total</b>             | <b>10,796,588</b>                    | <b>439,602</b>               |               | <b>73,542</b>      |                 | <b>13,626</b>            |

\* 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.

**PG&E**

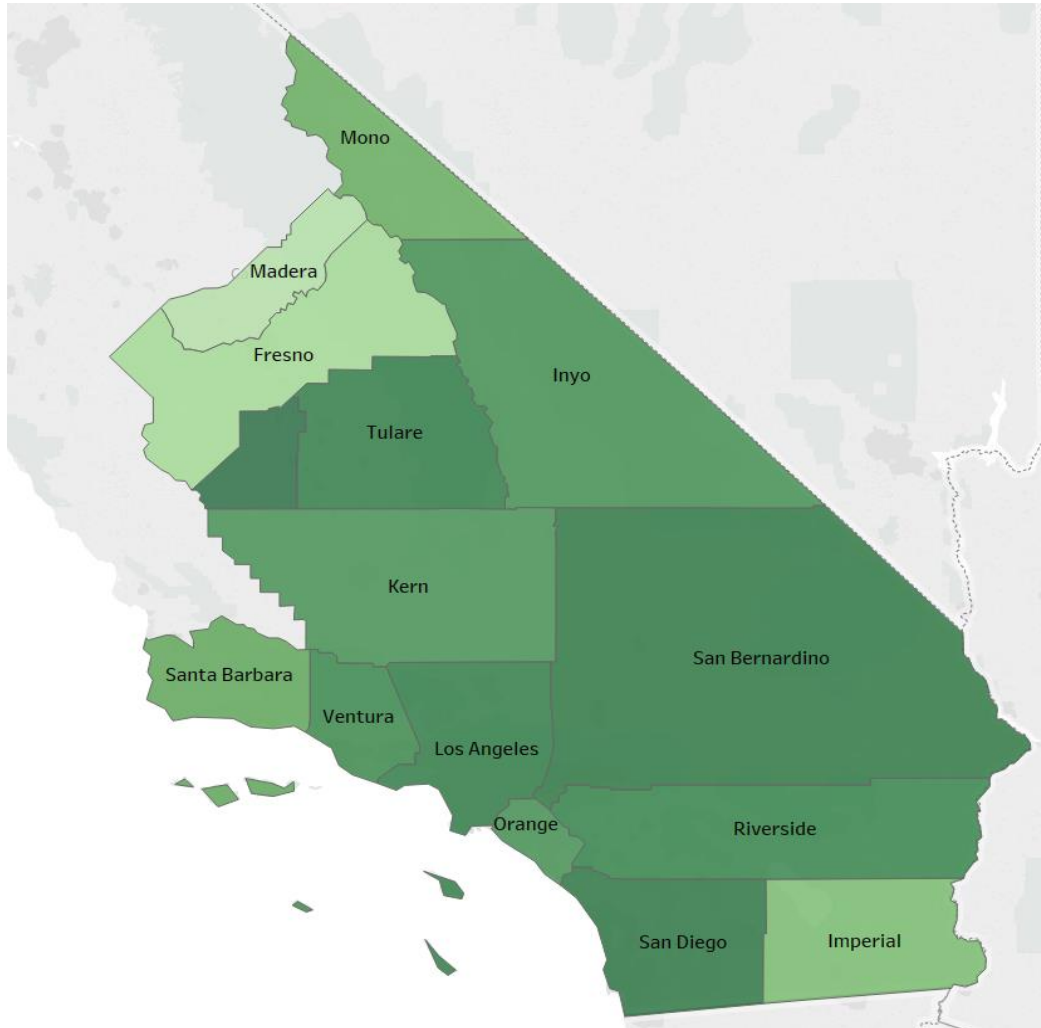


\*Represents PG&E counties with the lowest enrollment rates, as of July 31, 2022.  
\*Excludes counties with less than 1,000 estimated eligible households



# FERA Program *FERA Enrollment map*

## SCE

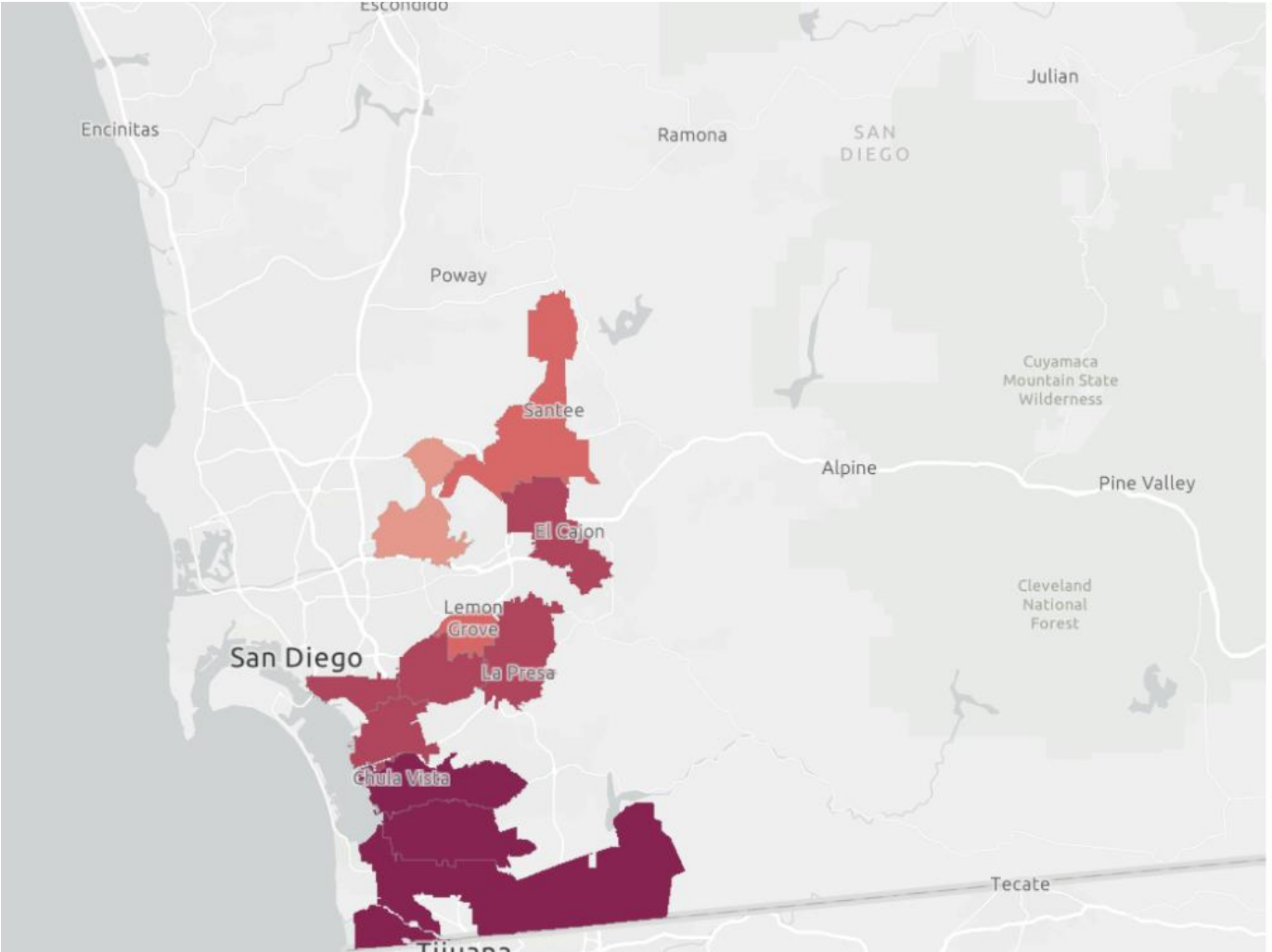


| County        | Enrollment Rate* |
|---------------|------------------|
| Riverside     | 14%              |
| Orange        | 13%              |
| San Bernadino | 11%              |
| Los Angeles   | 10%              |
| Ventura       | 10%              |
| Tulare        | 10%              |
| Kings         | 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 <sup>1</sup> | YTD Expenditures <sup>2</sup> | %          |
| PG&E  | \$180,979,812                  | \$75,587,779                  | 42%        |
| SCE <sup>3</sup>  | \$75,300,964                   | \$39,721,203                  | 53%        |
| SDG&E   | \$27,432,330                   | \$7,851,077                   | 29%        |
| SoCalGas  | \$116,291,772                  | \$49,611,541                  | 43%        |
| <b>Total</b>  | <b>\$400,004,878</b>           | <b>\$172,771,600</b>          | <b>43%</b> |

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

<sup>1</sup> 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.

<sup>2</sup> 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.

<sup>3</sup> 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 <sup>1</sup> |                   |                  | Estimated Annual HH Usage for HH Treated YTD <sup>2</sup> |                   | Savings as % of Average HH Usage |        | Annual Program Savings Goal <sup>3</sup> |                  |
|--|-------------------|------------------|---|-------------------|----------------------------------|--------|--|------------------|
| 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        |
| <b>TOTAL</b>                                       | <b>32,121,579</b> | <b>1,052,272</b> | <b>492,381,812</b>  | <b>31,041,870</b> |                                  |        | <b>36,836,748</b>                        | <b>2,191,496</b> |

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

<sup>2</sup> 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.

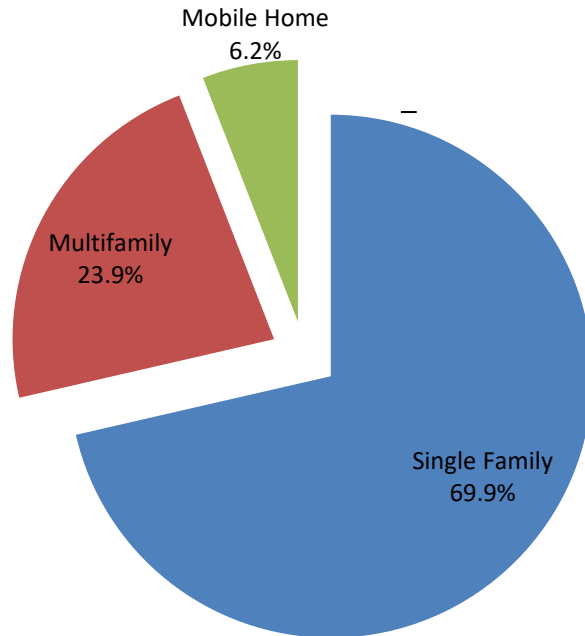
<sup>3</sup> Per Attachment 1 of D.21-06-015. Includes ESA Program (SF, MH, MF In unit) and MF CAM.



# 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 <sup>1</sup> |                        |                |                            |  |
|--------------------------------------|------------------------|----------------|----------------------------|--|
| Utility                              | Est. HH Treated Target | Total          | Total as % of 2022 Treated | Total as % of Eligible ESA HH <sup>2</sup> |
| 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%                                      |
| <b>Total</b>                         | <b>194,751</b>         | <b>128,469</b> |                            |  |

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

<sup>2</sup> 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  | Opportunities   |
|---|---|
| <ul style="list-style-type: none"><li>PG&amp;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.</li><li>In June, PG&amp;E launched its Tribal Grant Program, which offers \$5,000 in stipend to interested tribes for providing information regarding PG&amp;E assistance programs and energy conservation to its members. Information about the grant was shared with all tribes via email and featured in PG&amp;E's Q2 Tribal Newsletter.</li><li>In July, PG&amp;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&amp;E is inviting them to apply for grants this year. PG&amp;E has received one application.</li></ul> | <ul style="list-style-type: none"><li>PG&amp;E is looking at ways to improve grant participation in 2023:<ul style="list-style-type: none"><li>Evaluate existing outreach efforts</li><li>Invite feedback from tribes</li><li>Evaluating grant structure and award amount</li><li>Identify additional opportunity to coordinate with CARE/FERA CBO outreach</li></ul></li></ul> |



# 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><b>(Federally-Recognized Tribes)</b> 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, Habematolel 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, Mechoopda 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><b>(Non-Federally Recognized Tribes):</b> Amah Mutsun Tribal Band, American Indian Council of Mariposa County (Southern Sierra Miwuk 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><b>Housing Authority Offices:</b> 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><b>TANF Offices:</b> 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"><li>• The activities are in accordance with D.21-06-015.</li><li>• SCE's tribal liaisons meet with all 13 tribes twice annually, discussing available programs &amp; services</li><li>• Maintained at least two tribal contacts per tribe</li><li>• Ongoing efforts to identify tribes seeking federal recognition</li><li>• Updates made to dedicated page on sce.com for tribal outreach, including wildfire safety, EE programs, etc.</li><li>• Mini-grant Discussions: outreach methods, application design, grant amounts, issuance, participation guidelines and expectations</li></ul> | <ul style="list-style-type: none"><li>• Success: Ongoing communication with some tribal contacts</li><li>• Success: Receptive to accepting and distributing program information</li><li>• Challenge: Identifying non-federally recognized tribes</li><li>• Challenge: Low response rates</li></ul> |

# 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<br>Southern California Edison<br>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)

- Tribal Relations Manager has contacted all Tribes SDG&E serves to conduct listening sessions.
  - 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.
  - To date, three (3) tribes have responded.
- Continued partnerships with two Tribal CBOs:
  - **Southern California Tribal Chairmen's Association (SCTCA)**
    - Total Outreach Activities YTD: 10
    - Total Reach: 71,074
  - **Southern California American Indian Resource Center (SCAIR)**
    - Total Outreach Activities YTD: 34
    - Total Reach: 23,438

## SUCSESSES & CHALLENGES

- **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 |
| <b>Demographic</b>            |                              |                             |                         |                               |                        |  |   |   |                                  |
| 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"><li>• SoCalGas maintains communication with Tribes serviced by SoCalGas.<ul style="list-style-type: none"><li>• SoCalGas reaches out to all federally-recognized Tribes in its service territory via email, phone and in person at community events</li><li>• SoCalGas strives to maintain at least two Tribal contacts for each Tribe in its service territory</li></ul></li><li>• SoCalGas is enhancing its outreach strategy to help navigate and increase engagement within tribal communities.<ul style="list-style-type: none"><li>• Finalizing contract with Tribal consultant to help roll out outreach strategy</li></ul></li></ul> | <ul style="list-style-type: none"><li>• 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</li><li>• 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</li><li>• Challenge: Identifying non-federally recognized tribes</li><li>• Challenge: Low response rates from tribes to receive additional program information</li></ul> |



# 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.

|   |   |
|---|---|
| <b>Agua Caliente Band of Cahuilla Indians</b>                               | <b>San Manuel Band of Serrano Mission Indians of the San Manuel Reservation</b> |
| <b>Augustine Band of Cahuilla Indians</b>                                   | <b>Santa Rosa Band of Cahuilla Indians</b>                                      |
| <b>Cabazon Band of Mission Indians</b>                                      | <b>Santa Ynez Band of Chumash Mission Indians of the Santa Ynez Reservation</b> |
| Cahuilla Band of Mission Indians of the Cahuilla Reservation                | Serrano Nation of Mission Indians   |
| Chemehuevi Indian Tribe of the Chemehuevi Reservation                       | <b>Soboba Band of Luiseño Indians</b>   |
| 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   |
| <b>Morongo Band of Cahuilla Mission Indians</b>                             | Tule River Indian Tribe of the Tule River Reservation                           |
| <b>Pechanga Band of Luiseño Mission Indians of the Pechanga Reservation</b> | <b>Twenty-Nine Palms Band of Mission Indians of California</b>                  |
| 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 |
| <b>Demographic</b>            |                           |                         |                         |                           |                        |  |   |  |   |  |                                 |
| 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.



# 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         |
| <b>Total Unspent Funds through 7/31/2022</b> | <b>\$21.69</b> |

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)   |                 |
|---|-----------------|
| <b>Remaining 2009-2016 Unspent Funds [1]</b>  | <b>\$125.15</b> |
| 2017-2020 Revenues Collected  | \$491.69        |
| 2017-2020 Total Expenses [2]  | \$394.62        |
| 2017-2020 Unspent Funds [1]   | \$97.07         |
| <b>Total Remaining Unspent Funds through PY 2020 [1]</b>                                  | <b>\$222.22</b> |
| 2021 Revenues Collected   | \$9.12          |
| 2021 Total Expenses [2]   | \$112.91        |
| <b>Total Remaining Unspent Funds through PY 2021 [1]</b>                                  | <b>\$118.43</b> |
| 2022 Revenues Collected   | \$0.00          |
| 2022 Total Expenses [3]   | \$50.91         |
| <b>Total Remaining Unspent Funds as of 7/31/2022 [1]</b>                                  | <b>\$67.52</b>  |
| <u>Footnotes</u>  |                 |
| [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

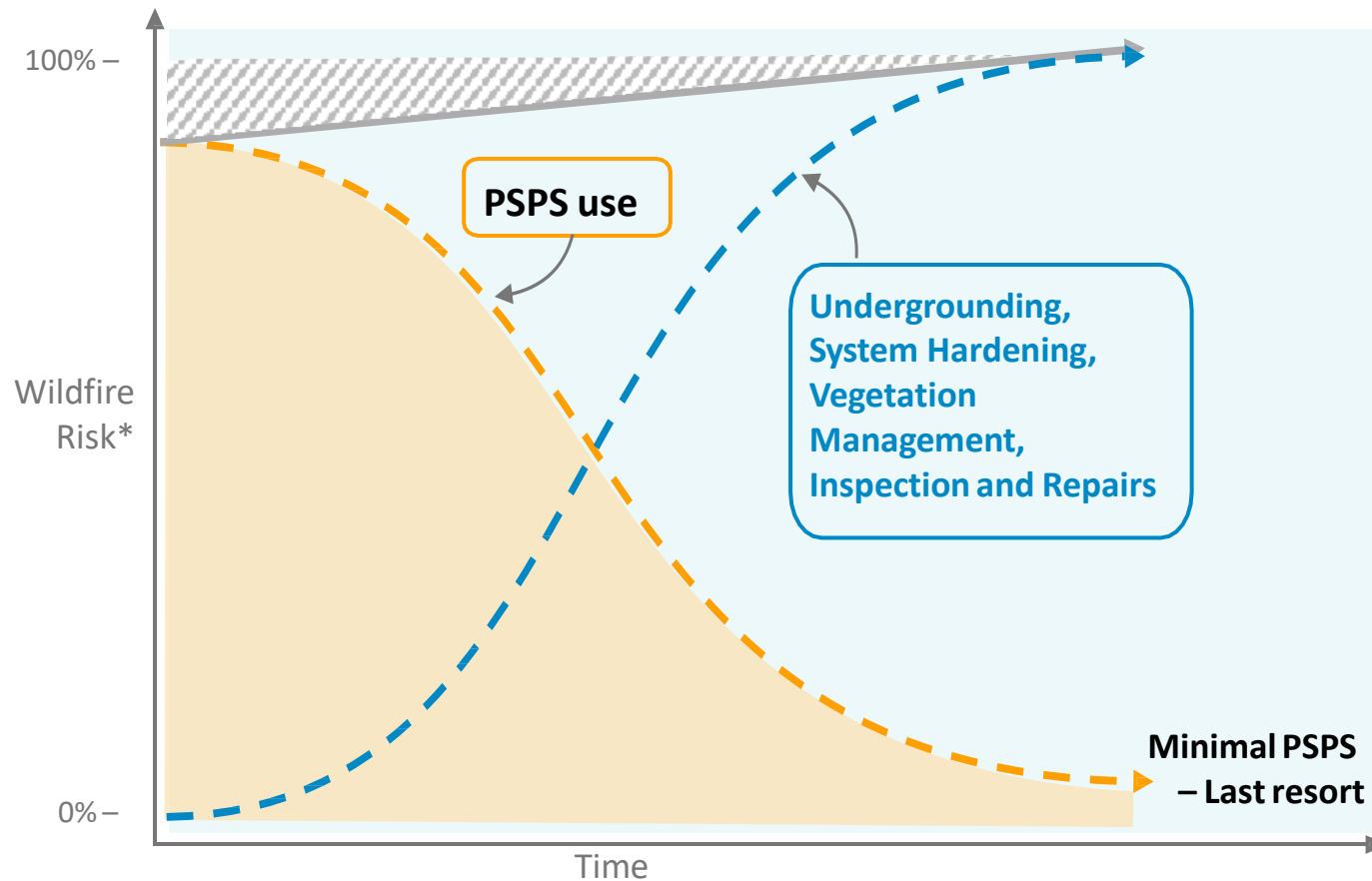


### 2022 FOCUS

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/pspsresources](https://pge.com/pspsresources)
- **211 Partnership:** Delivering 24-7 free confidential support and resources via calls or texts. [211ca.org](https://211ca.org)
- **Kids Emergency Safety Site:** Educating kids in grades K-6 about emergency safety.  
[Kidsemergency-safety.com](https://kidsemergency-safety.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.



## PPS Support

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



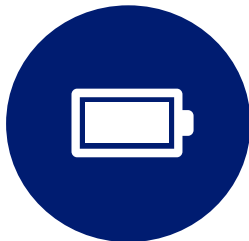
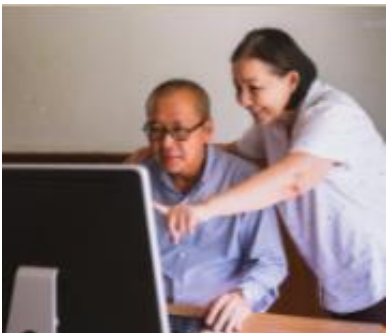
## Accessibility

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



## Community Partners

~16 Joint IOU and local resiliency, PPS 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

PPS 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](https://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.