

Low Income Oversight Board

4th Quarterly Meeting
December 8, 2022
10:00 AM – 3:30 PM

Meeting Packet



California Public
Utilities Commission



Low Income Oversight Board

4th Quarterly Meeting

Thursday December 8, 2022

10:00 am – 3:30 pm

In-person at:

Warren-Alquist State Energy Building
1516 Ninth Street
Art Rosenfeld Hearing Room
Sacramento, California 95814

Virtual Via Webex:

<https://cpuc.webex.com/cpuc/j.php?MTID=m2b8515bd6f29d32c38dfa5164bf10cac>

Webinar password:2022 (2022 from phones)

Webinar number:2493 204 8562

Join by phone: 1-855-282-6330 (US Toll Free); +1-415-655-0002 (US Toll)

Access code: 249 320 48562

Muting: *We greatly appreciate your cooperation in reducing background noise on the audio connection by muting your line when you are not speaking.*

All meeting materials will be available on the LIOB website in December at <https://liob.cpuc.ca.gov/>

AGENDA

Oral comments: The Low Income Oversight Board (LIOB) will accept oral comments on each agenda item during the meeting, as well as general comments at the start of the meeting. Speakers must refrain from discussing matters pending before the Commission in any “ratesetting” or “adjudicatory” proceedings other than those in which this meeting has been formally noticed: A.19-11-003 (CARE/ESA), A.20-03-014 (CARE/ESA), and R.15-03-010 (San Joaquin Valley).

10:00 – 10:15 a.m.	1. Welcome and Introductions - Benito Delgado-Olson, LIOB Chairperson and Genevieve Shiroma, CPUC Commissioner (15 min)
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10:15 – 10:20 a.m.	2. Approval of the September 29, 2022 LIOB Meeting Minutes – <u>Action Item</u> (5 min)
10:20 – 10:35 a.m.	3. Public Comment (15 min) <i>*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. Public comment will be facilitated via Webex.</i>
10:35 – 10:50 a.m.	4. Subcommittee Reports (15 min) <ul style="list-style-type: none"> • Low Income Energy Assistance Programs (LIEAP) <ul style="list-style-type: none"> ▪ <u>Castaneda</u>, Stamas, Watts, Wimbley, Medina, Irwin, Castilone, Bierman • Low Income Needs Assessment (LINA) <ul style="list-style-type: none"> ▪ Delgado-Olson, Stamas, Castaneda, Medina • Legislative <ul style="list-style-type: none"> ▪ <u>Stamas</u>, Watts, Castaneda, Delgado-Olson • Water & Climate Change <ul style="list-style-type: none"> ▪ <u>Tang</u>, Castaneda, Medina, Irwin, Delgado-Olson
10:50 – 11:00 a.m.	BREAK
11:00 – 11:45 a.m.	5. Joint Investor Owned Utilities Status Reports (45 min) <ul style="list-style-type: none"> • Report of the CARE and ESA Programs • Unspent Funds for Energy Savings Assistance Program • Disconnections and Arrearage Management Plans • COVID-19 Impacts/ PSPS
11:45 a.m. – 12:00 p.m.	6. California Department of Community Services & Development Update – Jason Wimbley, CSD (15 min) <ul style="list-style-type: none"> • California Arrearage Payment Program (CAPP) • Coordination Report on Low Income Weatherization Program (LIWP)
12:00 – 1:15 p.m.	LUNCH
1:15 – 1:45 p.m.	7. Senate Bill 1208 - Low-income utility customer assistance programs: concurrent application process – <u>Action Item</u> (30 min)

1:45 -2:35 p.m.	<p>8. CPUC Standing Reports (50 min)</p> <ul style="list-style-type: none"> • Energy Division - Kapil Kulkarni, Energy Division • Community Help and Awareness of Natural Gas and Electric Services (CHANGES) – Ravinder Mangat, Executive Division
2:35 – 2:45 p.m.	BREAK
2:45 – 3:15 p.m.	<p>9. Community Based Organization (CBO) Grant Pilot Program – CPUC Business and Community Outreach (BCO) (30 min)</p>
3:15 – 3:30 p.m.	<p>10. Wrap Up & Closing Remarks (15 min)</p>

All times indicated and the order of business is approximate and subject to change.

Public Meeting

This is a public meeting. The meeting is accessible to the physical disabled. A person who needs a disability-related accommodation or modification in order to participate in the meeting, may make a request by contacting Gillian Weaver at gillian.weaver@cpuc.ca.gov Providing your request at least five (5) business days before the meeting will help ensure availability of the requested accommodation.

Remote Attendance

The LIOB will facilitate remote participation using WebEx. Via Webex, presentations will appear on your computer/laptop/mobile device screen, and audio may be heard via the device or telephone. Please be aware that the WebEx meeting may be recorded.

Notice

For the purposes of the Commission's Rules of Practice and Procedure, Rule 8.3 (c)(1) regarding oral ex parte communications in ratesetting proceedings, this meeting has been noticed on the service lists of Applications A.19-11-003, et al; A. 20-03-014, et al; R.15-03-010, and R.13-11-005. A courtesy notice has also been sent to the following quasi-legislative proceedings: R.18-07-005 (Disconnections), R.18-07-006 (Affordability), and R.17-06-024 (Low Income Water).

Draft meeting notes

Thursday September 29, 2022, 9:30 AM – 3:30 PM

Webex Virtual Meeting

Board Member Attendance:

Present: Shiroma, Delgado-Olson, Wimbley, Castaneda, Medina, Watts, Irwin, Hernandez, Tang

Absent: Castilone, Stamas

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

Meeting Presentations: <https://liob.cpuc.ca.gov/previous-liob-meetings/>

Please note: Agenda Items are listed in the order they were discussed. Some items were discussed out of numerical order.

1. Welcome and Introductions

Board Chair Delgado-Olson opened the meeting of the Low Income Oversight Board (LIOB) at approximately 9:30 AM. Commissioner Shiroma provided opening remarks and noted the term expiration of Valarie Hernandez, from Southern California Edison (SCE), after this meeting. A new electric and gas corporation representative will be appointed by the next quarterly LIOB meeting. Commissioner Shiroma also shared that she would be unable to attend the afternoon portion of the meeting.

Board Member introductions followed, with Board Members Castaneda and Watts asking if Item 10, Subcommittee Reports, could be moved to earlier in the meeting. Board Chair Delgado-Olson suggested combining Items 10 and 6, Joint Investor Owned Utilities Status Report. Commissioner Shiroma agreed with this agenda structure and suggested scheduling the subcommittee reports earlier in meeting agenda for the 4th Quarterly meeting.

2. Approval of the July 21, 2022, Meeting Minutes – Action Item

Commissioner Shiroma moved to approve the [minutes from the July meeting](#) and Board Member Castaneda seconded the motion. The LIOB approved the minutes unanimously.

3. Public Comment

There was no comment provided by members of the public.

4. Comment from Community Based Organizations & Special Presentations – California Department of Developmental Services

Board Chair Delgado-Olson introduced Tamara Rodriguez, the Emergency Preparedness and Response Officer for the California Department of Developmental Services (DDS). The Board Chair noted the connections between the DDS population and the Medical Baseline programs. Ms. Rodriguez provided a [presentation on the organization](#) and highlighted opportunities for partnership.

Board Chair Delgado-Olson asked for confirmation that the Regional Centers operated by DDS assist with income and health verification, which if so, could help individuals apply for the Medical Baseline program. Ms. Rodriguez responded that this is an opportunity for the department to look into. Board Member Wimbley commented that participation in the Low Income Home Energy Assistance Program (LIHEAP) automatically qualifies a customer for the California Alternate Rates for Energy (CARE) program, and asked if there was a similar opportunity of a program that verifies both income and medical conditions, which could be used for the Medical Baseline program.

Board Member Medina asked how to integrate the care givers of individuals with special needs, who may live separately. Specifically, how policies that allow for family members to assist in applications.

Board Member Castaneda expressed support for Board Member Wimbley's suggestion to create a type of categorical eligibility for Medical Baseline. Board Member Castaneda asked about the batteries provided by DDS regional center and whether they are intended for Public Safety Power Shutoffs (PSPS). Ms. Rodriguez commented that part of the intention of portable back up batteries is to keep people in their home as long as there is not a threat of fire.

Board Member Wimbley commented on the Medical Baseline customer base being "hard to reach" and asked if there were opportunities to increase outreach. Ms. Rodriguez answered that DDS works through Community Based Organizations (CBOs) and would want to work with them to identify gaps in outreach.

Board Member Medina acknowledged the utility Medical Baseline presentation occurring subsequently in the meeting and suggested the creation of help desk to promote cross organization collaboration.

5. Medical Baseline Program Overview

Board Member Hernandez provided brief opening remarks and introduced Zeynep Ozfatura of Pacific Gas and Electric (PG&E), who provided a joint utility overview of the [Medical Baseline Program](#).

Board Chair Delgado-Olson asked what the barriers would be to granting regional centers the ability to enroll customers in the Medical Baseline program. Ms. Ozfatura commented that

some benefits that could come from the regional centers would be raising awareness and assistance in filling out online forms. However, the Public Utilities Code requires verification from a qualified healthcare professional and must comply with Health Insurance Portability and Accountability Act (HIPAA).

Commissioner Shiroma commented that it would be good to know how many Medical Baseline customers there are currently, and also asked about SCE's tribal community engagement for this program. Kerri Gardner of SCE answered that their utility has outreached to several tribes this year and that the slide the Commissioner referenced may be incorrect.

Board Member Medina commented on the definition of baseline and expressed that it is critical that this information be communicated clearly to customers. Board Member Medina reviewed the various utility program websites and noted that all the utilities ask customers to print an application, which may be difficult for some individuals. Additionally, the Board Member Medina commented on the marketing language on program eligibility, such as low-income and fixed income, as some customers may not recognize themselves in those categories.

Board Member Wimbley commented that Medical Baseline program could benefit from the DDS regional centers, in terms of understanding how many eligible customers there might be that are not being served. Board Member Wimbley acknowledged the short term and long-term opportunities for improvement. In the short term, he asked if there was an opportunity to expand utility contracts to regional centers to support them informing individuals about the program. For the long term, Board Member Wimbley suggested reexamining the Public Utilities Code to make sure that the Medical Baseline program is administered in a way that most benefits customers and prevents unnecessary barriers for them.

Erin Maturo of San Diego Gas and Electric (SDG&E) commented to explain that the medical baseline program is not income eligible, but rather is just based on medical condition. Board Member Wimbley acknowledged the differences between Medical Baseline and CARE, but explained that in getting to hard-to-reach populations, it would be helpful to limit application barriers and use information that is provided for other programs. Ms. Ozfatura also responded that Medical Baseline does not have dedicated program funding, like CARE. Ms. Gardner of SCE shared that the regional centers do currently have the ability to help customers fill out applications for utility programs, but limiting barriers is something to strive for.

6. Joint Investor-Owned Utilities Status Reports

Board Chair Delgado-Olson noted the time and asked for permission to delay the lunch break until approximately 12:30 PM to allow for a full hour for this agenda item. A representative of each IOU presented a one slide summary for program status updates from their respective utility before Board Member discussion. More information on [low income programs](#), as well as [disconnections and arrearage management](#), was provided to the Board in advance.

Board Member Castaneda commented on SCE's suspension of enrollments and creation of a customer waitlist for the Energy Savings Assistance (ESA) program. Board Member Castaneda also asked about the public goods charge, specifically when it is suspended and collected, and more detail on what the estimated eligible enrolled population is in terms of the new eligibility guidelines. SCE answered on the question of collections that they would be using unspent funds to offset future collections. Board Member Castaneda responded that he would like to know about the impact of not collecting funds due to unspent funds.

Commissioner Shiroma asked about the ESA program year-to-date expenditures and whether all the utilities are on track to spend their allocated budgets by the end of the year. Representatives from the four IOUs confirmed that they are on track for their respective budgets, but explained that much of the spending comes in the second half of the year.

Commissioner Shiroma asked if SCE and SoCalGas were coordinating on enrollments. SCE answered that since SCE's budgets and targets are so much lower than SoCalGas's, they have decreased joint enrollments from contractors. Commissioner Shiroma responded that it is important to report on the multiyear budgets and lessons learned from the new program implementation.

Board Member Medina asked if in the future the IOUs could gather information on Arrearage Management Programs (AMP) customers who will be reported to credit services, as that reporting will negatively affect their overall financial wellbeing.

Board Chair Delgado-Olson noted the theme of data sharing as a milestone for better program enrollment. The Board Chair expressed that he would like the IOUs to inform the LIOB on what the challenges of data sharing currently are at an upcoming subcommittee meeting. SCE responded that what might better facilitate data sharing would be legislation or a CPUC directive. PG&E also supported SCE's comments by sharing that without statewide legislation, there has to be customer consent. PG&E also clarified their previous comments on the expected full expenditure of budgets by sharing that the pilot programs may not fully expend their funds this year, but in that case, would move the funds forward into the next program year.

Board Member Wimbley commented that there are two forms of data sharing, one from customers and another macro data sharing of aggregated data. The latter of which can be worked on in the immediate. Board Member Castaneda responded that macro level data would be helpful in the Southern California, where there are multiple utilities serving customers.

Board Member Castaneda referred to the smart thermostat information included in the IOU slide deck and noted the differences between offerings from utilities. Board Member Castaneda recommended the Board issue a recommendation on how smart thermostats are provided. Commissioner Shiroma responded that it is important to go back to the decision language for the Summer Reliability proceeding regarding how they are distributed to customers and workforce education and training. Board Member Castaneda agreed with the Commissioner to

refer back to the decision language and use the subcommittee to monitor the implementation of those requirements.

At this point in the meeting, the Board adjourned for lunch and Commissioner Shiroma departed from the meeting for the rest of the day.

7. California Department of Community Services & Development Update

Board Chair Delgado-Olson reconvened the Board at approximately 1:10 PM.

Board Member Jason Wimbley provided a status update from the California Department of Community Services and Development (CSD) on the California Arrearage Payment Program (CAPP) and the Low Income Weatherization Program (LIWP). For the 2021 CAPP, CSD is wrapping up final reports and disbursements. Estimates are that 1.4M residential and commercial customers were served with \$989M in relief funds. For the 2022 CAPP, the legislature approved \$1.2B for second iteration of the program. The 2022 program is focused on debt relief to active residential customers who accrued arrearages between March 2020 and December 2021. Utilities have 30 days to apply for application funds and CSD has through January 2023 to distribute funds. Energy utilities are prohibited from disconnecting customers for non-payment of arrearages throughout the duration of this process.

8. CPUC Standing Reports – Water Division Update

Viet “Kevin” Trương of the CPUC Water Division provided an [update on current Customer Assistance Program \(CAP\), Conservation, and Water Utility Acquisitions Proceeding](#).

Board Member Tang provided context for conservation efforts and noted CPUC rule 14.1. Board Member Tang also shared that water usage is very weather dependent and the summer/early fall period is an important time to conserve outdoor water usage.

Board Member Medina acknowledged the statewide messaging on water conservation.

Board Chair Delgado-Olson mentioned the differences in water usage in different parts of the state and asked if there were policies targeting specific regions that have had a more difficult time meeting conservation goals. Mr. Trương answered that there are discussions on conservation based on regional differences, but defer to the water utilities on how to meet conservation goals. Board Member Tang seconded these comments and explained that many water decisions are made at the local level.

8. CPUC Standing Reports – Energy Division Update

Kapil Kulkarni, of the CPUC Energy Division, provided [updates on the large IOUs ESA/CARE/FERA program cycle, including IOUs 2022 ESA reporting, the ESA Working Group, ESA program solicitations, and the Low Income Needs Assessment \(LINA\)](#).

Board Member Castaneda asked if there was an opportunity for the working group to introduce variables into the potential and goals study. Mr. Kulkarni answered that the study will evaluate

the savings potential and the working group will have an opportunity to comment on the methodology and how to capture that savings potential.

Board Member Castaneda asked if the CPUC is looking at IOU solicitation contracts to see how they align with the decision requirements. Mr. Kulkarni answered that Energy Division has worked with utilities to review contract documents and provided feedback.

Board Member Medina asked for clarification on the document that Commissioner referenced reading and Mr. Kulkarni answered that it is the decision in the proceeding docket card. Board Member Medina also noted the use of words, such as a “solicitation,” which may have multiple meanings to people, and suggested using more work friendly language to promote diversity in contractors. Mr. Kulkarni responded that part of the intent of making the bidding process public was to make sure the opportunity to contract was made available to many businesses.

Board Member Castaneda commented on the ESA program’s success in attracting and educating contractors from diverse communities, and on the program’s complexity in administration.

Board Chair Delgado-Olson asked when the scoping for the next LINA will begin. Mr. Kulkarni answered that it will begin as soon as the 2022 LINA is concluded, approximately early in 2023.

8. CPUC Standing Reports Legislative Update

An [update on legislation relevant to low income customers](#) was provided by the CPUC Office of Governmental Affairs (OGA) to the LIOB in advance of the meeting. OGA Director Grant Mack was available to answer questions and provide a brief update on the status of bills, including which bills from previous updates were passed and which did not.

Board Chair Delgado-Olson asked about Senate Bill 1020 and the creation of an authority within it. Mr. Mack answered the bill did not have any funding attached to support an authority, however, some of these ideas were moved to a different bill, Senate Bill 846. Senate Bill 846 requires that the California Energy Commission must develop a Clean Energy Reliability Investment Plan, due to the Legislature by March 1, 2023, that supports programs and projects that accelerate the deployment of clean energy resources, support demand response, assist ratepayers, and increase energy reliability. Board Chair Delgado-Olson responded by asking about the discussion of the public purpose programs surcharge and whether that conversation would continue as funding for new programs were considered. Mr. Mack answered that the intent was to assist with bill affordability, however, the administration of the public purpose programs surcharge is extremely complicated and was not resolved in the most recent legislative session.

Board Member Castaneda expressed the desire for low income program stakeholders to have a seat at the table for these large discussions around affordability, clean energy, reliability, etc. Mr. Mack responded that it is important for all stakeholders to discuss this, and one area of

potential opportunity of improvement in implementation would be to bundle or group programs together.

9. Community Based Organizations (CBO) Pilot Proposal (D.22-04-037)

Claire Coughlan of PG&E and Tom Knox of Valley Clean Air Now (Valley CAN) provided a presentation on [D. 22-04-027 regarding a CBO Arrears Case Management Pilot proposed to address current gaps in assisting customers.](#)

Board Member Tang asked about what the financial education for the customer, as proposed by the pilot, would entail. Mr. Knox answered that the details would be confirmed by the program administrator, but the intent would be to educate customers on debt management and the availability of other assistance programs.

Board Member Medina commented on how it would be helpful to learn from the AMP and to learn more about rural communities. Board Member Medina also noted that this pilot could help educate all members in a household, not only account holders, as well as create a system for CBOs to ask for assistance.

Board Member Watts asked about for more information on the target zip codes. Ms. Coughlan answered that they are zip codes identified as Affordability Areas of Concern (AAC) by the CPUC. Board Member Watts asked if there was overlap with CalEnviro Screen Disadvantaged Communities. Ms. Coughlan answered that there is some overlap, but not completely. The full list of zip codes is available in the [August 2022 compliance filing.](#)

Board Chair Delgado-Olson noted the similarity to the CHANGES program service model and asked if there would be coordination with those CBOs. PG&E answered that the pilot is patterned after that model, but the CBOs who participate in the pilot will be expected to follow customers for two-years and create a customized plan.

10. Subcommittee Reports

The Legislative and Low Income Needs Assessment (LINA) subcommittees did not meet this quarter. Board Member Tang shared that the Water & Climate Change subcommittee will meet next quarter.

Board Member Castaneda provided a detailed [update from the last Low Income Energy Assistance Programs \(LIEAP\) subcommittee meeting](#) in advance and summarized this information at a high-level verbally. Board Member Castaneda expressed that the first step is to share these findings to the larger board and then to share them with the ESA working group.

Board Chair Delgado-Olson expressed appreciation for Board Member Castaneda's role on the ESA Working Group and discussed the quarterly LIOIB meeting structure, which has been adjusted to allow for more discussion on low-income assistance programs. The Board Chair expressed that it is important to thoughtfully structure the opportunities to review and discuss

IOU budgets and program applications with enough time to provide an impact. Board Chair Delgado-Olson closed by noting that budget flexibility has been an ongoing issue.

Board Member Castaneda responded that he spoke with The Utility Reform Network (TURN) on unspent budgets and that it is not definitive why there are historically unspent funds in the program. Board Member Castaneda spoke to the importance of understanding how cost-effectiveness is calculated and how health, comfort, and safety measures are considered.

Board Member Wimbley asked for clarification on the proposed next steps. Board Member Castaneda answered that he would like to formalize these recommendations to put forward to the ESA Working Group to come up with solutions.

Board Member Watts commented on smart meters and issue of not having broadband, but noted that there are new products on the market that don't rely on a customer's internet connection. Board Member Watts also expressed that the Board should change how they rethink the program, from homes treated, to energy efficiency and energy saved. Board Member Castaneda responded affirmatively and pointed out some of the differences between weatherization measures and energy efficiency measures.

11. Future Quarterly LIOB Meeting Options

Board Chair Delgado-Olson noted that this agenda topic was an opportunity for board members to discuss how they would like to meet, either virtually, in-person, or hybrid, in for the next year. Board Member Castaneda supported the idea of having a 20th year anniversary celebration event in person in an area convenient to low income and energy efficiency stakeholders. Board Member Castaneda also suggested meeting in person at a tribal nation at the future, as well as at a physical space where an ESA contractor provides services to customers. Board Chair Delgado-Olson supported both ideas.

Board Chair Delgado-Olson stated that the Board will keep working offline on the meeting details for the December meeting, but was supportive of an in-person option.

12. Technical Advisory Committee (TAC) Updates

The Technical Advisory Committee (TAC) did not meet during this quarter, however, Board Member Wimbley commented that the TAC may be able to support efforts on data sharing in general, and with the Medical Baseline program in particular.

13. Wrap Up & Closing Remarks

Board Chair Delgado-Olson provided brief closing remarks and thanked Board Member Hernandez for her service on the LIOB. Board Member Hernandez thanked the Board for the opportunity to serve. Board Members Medina also provided closing remarks.

The meeting adjourned at approximately 3:30 PM.

Item 4: Subcommittee Reports

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

LIOB Subcommittee Q&A

LIEAP Subcommittee Meeting on November 30, 2022

1. What are the IOUs budgets for the 2023 Program Year?

PG&E’s planned PY 2023 budgets for the ESA Program are provided in the table below (outlined in red)

ESA Programs/Pilots	2023 Planned Budget	2023 Authorized Budget
ESA Main	\$112,569,288 ²	\$112,569,288
Multi-family (MF) ¹	\$19,520,888 ³	\$36,493,866
Pilot Plus/Pilot Deep (PP/PD)	\$11,804,213 ⁴	\$8,782,607

¹Multi-family offerings will be replaced by the Northern Multi-family Whole Building (Northern MFWB) program starting in 2023.

²This amount does not include the potential infusion of approximately \$9 million from unspent funds from MASH/SASH (D.15-01-027, OP 12).

³ The reduced MF budget for 2023 considers the ramp-up activities (e.g., outreach/project scope/evaluation) for the new MFWB program, which is expected to begin in Q1 2023. The reduced amount is being shifted to future program years to support Northern MFWB program implementation.

⁴This amount includes an estimated fund shift of \$3,021,606 from the 2022 budget for PP/PD. Current projections are based on 2022 expenses to-date and include forecast expenses for November and December. The actual amount of the 2022 fund shift will be included in the ESA Annual Report.

1a. How do these budgets differ from the authorized budgets from D.21-06-015?

PG&E’s planned PY 2023 budgets for MF and PP/PD are different from the budgets authorized in D.21-06-015. Please refer to the table in Question 1 for comparison.

1b. Are they higher or lower than 2022, and 2024?

The direction of variances between of PG&E’s planned 2023 budgets and the authorized budgets for 2022 and 2024 is summarized in the table below (outlined in blue)

ESA Programs/Pilots	2022 Authorized	2023 Planned Budget	2024 Authorized	2022 - 2023	2023 - 2024
ESA Main	\$103,732,423	\$112,569,288 ²	\$104,331,278	+	-
Multi-family (MF) ¹	\$25,890,417	\$19,520,888 ³	\$44,512,082	-	+
Pilot Plus/Pilot Deep (PP/PD)	\$8,782,607	\$11,804,213 ⁴	\$8,782,607	+	-

¹Multi-family offerings will be replaced by the Northern Multifamily Whole Building (Northern MFWB) program starting in 2023.

LIOB Subcommittee Q&A

ESA Subcommittee Meeting on November 30, 2022

²This amount does not include the potential infusion of approximately \$9 million from unspent funds from MASH/SASH (D.15-01-027, OP 12).

³ The reduced MF budget for 2023 considers the ramp-up activities (e.g., outreach/project scope/evaluation) for the new MFWB program, which is expected to begin in Q1 2023. The reduced amount is being shifted to future program years to support Northern MFWB program implementation.

⁴This amount includes an estimated fund shift of \$3,021,606 from the 2022 budget for PP/PD. Current projections are based on 2022 expenses to-date and include forecast expenses for November and December. The actual amount of the 2022 fund shift will be included in the ESA Annual Report.

1c. Have the IOUs supplemented or plan to supplement these authorized budgets with additional funds, such as from committed and unspent funds, fund shifting from within the program, or fund shifting from another program?

- **ESA Main:** There is a possibility that ESA Main could receive a transfer of approximately \$9 million from unspent MASH/SASH funds in 2023*. The funding is contingent upon CPUC's approval of the proposed transfer of unspent funds from MASH/SASH to ESA. The IOUs are required to file an advice letter at the close-out of the MASH/SASH programs; the advice letter will include the unspent funds and identify the recipient program for those funds. The IOUs plan to submit the advice letter as required by D.15-01-027 in Q1 2023. (**D.15-01-027 OP 12: Any money unspent and unencumbered on January 1, 2022, shall be used for "cost-effective energy efficiency measures in low-income residential housing that benefit ratepayers," as set forth in Public Utilities Code Section 2852(c)(3).*)
- **PP/PD:** PG&E plans to supplement the PY 2023 authorized budget for PP/PD with unspent funds from 2022. Currently, PG&E estimates the transfer to be approximately \$3,021,606; however, the final transfer amount may differ from this early estimate. (Note: D.21-06-015 OP 181 allows cross-year fund shift for pilots, including PP/PD, and MFWB).
- **Northern MFWB:** N/A. At this time, PG&E is in the process of finalizing its MFWB contract.

1d. How have the IOUs communicated their 2023 Program Year budgets and other program changes to their implementers and contractors?

PG&E holds quarterly meetings with its implementers and contractors. Program budgets are discussed in every meeting. The next quarterly meeting for ESA Main is scheduled for December 14, 2022.

PG&E held a quarterly meeting with its Pilot Plus/Deep Implementer on November 10, 2022, during which 2022-2023 financial projections were presented.

LIOB Subcommittee Q&A

ESA Subcommittee Meeting on November 30, 2022

2. What approaches are the IOUs taking to achieve deeper energy savings starting in 2023? What are the challenges associated with these approaches?

PG&E has been, and will continue to, conduct quarterly review of program cost-effectiveness (ESACET) and utilizing the information to identify opportunities to adjust measure offerings to optimize portfolio savings for ESA Main.

In addition, the ESA program is using historical ESA customer information and information from home energy audits (e.g., CARE/FERA customers that indicated they have a pool or electric heat) to identify households that may be eligible for high saving measures such as refrigerators, heat pump water heaters, pool pumps, etc. PG&E is targeting these customers via measure-specific postcards.

PD/PD is designed to explore the feasibility of achieving deeper energy savings. Lessons learned may be applied to ESA Main where applicable.

At this time, PG&E believes it is too early to assess the challenges associated the approaches described above.

3. Do IOUs plan to extend current contracts / what is the timeline for new contracts?

- **ESA Main:** Not applicable. PG&E had completed its RFP process and all contracts are in place for implementation starting in January 2023.
- **PP/PD:** Not applicable. PP/PD is a new offering; there is no prior contracts.
- **Northern MFWB:** To facilitate the transition from MF CAM to the new Northern MFWB Program (which is expected to launch in Q1 2023), PG&E plans to extend its existing MF CAM/SPOC contract through March 2023 to continue maintaining and updating project waitlist for the Northern MFWB, communicating Northern MFWB program updates to waitlisted customers.

4. What are the IOUs' overall plans in terms of program transition?

For example, how do the IOUs plan to extend contracts with current implementers and contractors until any new contracts (resulting from all the solicitations in 2022) are in place?

- **ESA Main:** Not applicable. All contracts are in place for implementation starting in January 2023.
- **PP/PD:** Not applicable.
- **Northern MFWB:** D.21-06-015 OP 128 requires PG&E to continue to support MF in-unit and CAM until the Northern MFWB program is up and running in 2023. PG&E plans to extend its existing CAM contract through March 2023 to continue maintaining and updating project waitlist for the Northern MFWB, communicating MFWB program updates to waitlisted customers. The in-unit

LIOB Subcommittee Q&A

ESA Subcommittee Meeting on November 30, 2022

treatment will continue to be implemented through ESA Main using the 2023 ESA Main budget following the existing process until MFWB is launched.

5. What challenges do the IOUs foresee in 2023 and how do they plan to mitigate them?

- **ESA Main:** PG&E is not anticipating challenges at this time.
- **PP/PD:** PG&E intends to derive enough information from the Pilot Plus/Deep efforts to inform the broader ESA Portfolio's approach to achieve deep energy savings while assessing potential impact on ESACET. While there is no set number of projects that can be estimated to derive useful information, PG&E intends to complete as many projects as is feasible in 2023 to ensure a sufficient base of projects can be evaluated for mid-cycle and 2027 applications. Given the short timeframe, a steep ramp-up is required. One factor that may impede steep ramp-up is customer skepticism (i.e., Pilot offering may seem too good to be true), which is being addressed through co-branded marketing on Pilot outreach materials, and a dedicated Pilot information page on pge.com validating the Pilot offerings.
- **Northern MFWB:** D.21-06-015 OP 122 requires the lead IOUs to submit an advice letter for their respective MFWB programs, and the advice letter must be to and approved by the CPUC prior to program implementation (D.21-06-015 at p.359). As of November, PG&E is in the process of finalizing the contract for the Northern MFWB program and plans to file the required Advice Letter as soon as the contract is fully executed. At this time, PG&E anticipates the Northern MFWB program to launch in Q1 2023. However, delays with the advice letter approval (e.g., protests) may result in delays with the planned program launch and negatively impact project pipeline/retreatment goals/timeline.

(Note: PG&E filed a 60-day extension request to comply with directive in D.21-06-015 OP 122 to submit an advice letter by November 30, 2022. PG&E sought relief to complete the administrative tasks required of the contract. As of the date of this response, the extension request is pending CPUC approval.)

6. Please provide an update on Marketing.

The responses provided in the Marketing section below apply to ESA Main only. PP/PD and MFWB have separate marketing plans that are specific to each program.

6a. When will the 2023 marketing outreach begin?

PG&E plans to deploy email/mail campaign on January 3, 2023. The "Always on" digital campaign will continue without interruption.

LIOB Subcommittee Q&A

ESA Subcommittee Meeting on November 30, 2022

6b. What is envisioned for the efforts?

PG&E is in the process of finalizing its marketing/outreach efforts for ESA.

Planned tactics include the following:

- 2-4 email campaigns in collaboration with contractors targeting specific households for Pool Pump, Central Heat Pump Replacement, Heat Pump Water Heater, and refrigerator offerings. Pool Pump is scheduled for the end of Q2 in time for summer.
- Nurture campaign to increase conversion of customers who have responded but have not successfully taken the next step to enroll.
- Continue to prioritize DAC segment. In Q3 2022, among the DAC segment, PG&E saw a 13% response rate via application and a 5% click through rate (CTR) via email, double the CTR of residential benchmarks.

6c. How do the IOUs leverage CARE/FERA data to generate leads?

PG&E is leveraging its CARE/FERA data to generate leads by including customers' CARE scores as an attribute in the new ESA propensity model.

LIOB Subcommittee Meeting
November 30, 2022 from 10am-12pm
~SCE Responses~

1. What are the IOUs budgets for the 2023 Program Year?

Below is Table 9 which displays the approved budget from the Decision (D.) 21-06-015. SCE's ESA Main budget (line 2-EE (A)) includes budget for contractor/vendor material along with both the Building and Electrification (BE) and Clean Energy Homes (CEH) Pilot budget as noted in the table 9a below.

Table 9: ESA Approved Budgets (SCE)⁷

SCE Approved Budgets by Category							
	2021 (July 1 to Dec. 31)	2022	2023	2024	2025	2026	Total
EE Subtotal (A+B)	\$36,098,517*	\$44,048,684	\$55,459,700	\$78,032,800	\$83,101,017	\$62,003,783	\$358,744,502
EE (A)		\$37,471,491	\$46,199,512	\$60,494,956	\$68,400,219	\$49,669,535	
EE-MF (B)		\$6,577,193	\$9,260,188	\$17,537,845	\$14,700,798	\$12,334,249	
Training Center	\$300,325	\$600,650	\$450,488	\$450,488	\$450,488	\$450,488	\$2,702,927
Workforce Education and Training	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Inspections	\$838,704	\$1,677,406	\$968,374	\$864,125	\$950,922	\$949,618	\$6,249,148
Marketing and Outreach	\$516,906	\$1,374,878	\$1,988,580	\$2,346,963	\$2,539,025	\$2,186,503	\$10,952,855
Statewide Marketing and Outreach	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Studies	\$147,500	\$225,000	\$342,500	\$290,000	\$92,500	\$125,000	\$1,222,500
Regulatory Compliance	\$381,941	\$691,730	\$791,921	\$720,611	\$821,669	\$751,251	\$4,159,122
General Administration	\$2,617,069	\$6,218,785	\$5,189,403	\$4,513,566	\$4,480,231	\$4,396,242	\$27,415,296
SPOC	\$85,965	\$171,929	\$171,929	\$171,929	\$171,929	\$171,929	\$945,611
CPUC Energy Division	\$25,789	\$51,579	\$51,579	\$51,579	\$51,579	\$51,579	\$283,683
Subtotal - Admin	\$4,828,233	\$10,840,028	\$9,782,845	\$9,237,332	\$9,386,413	\$8,910,680	\$52,985,531
Program Total	\$40,926,750	\$54,888,712	\$65,242,545	\$87,270,132	\$92,487,430	\$70,914,463	\$411,730,032
Staff Proposal Pilot Total		\$3,884,864	\$3,884,864	\$3,884,864	\$3,884,864	\$3,884,864	\$19,424,318
Portfolio Total	\$40,926,750	\$58,773,576	\$69,127,408	\$91,154,996	\$96,372,294	\$74,799,327	\$431,154,350

Table 9a: SCE's ESA Approved Budgets

	2022	2023	2024	2025	2026	TOTAL
ESA Core	30,829,878	36,197,756	48,501,378	54,738,388	41,168,312	211,435,712
BE PILOT	4,641,612	8,001,756	9,993,578	11,661,831	6,501,223	40,800,000
CEH PILOT	2,000,000	2,000,000	2,000,000	2,000,000	2,000,000	10,000,000
TOTAL	37,471,491	46,199,512	60,494,956	68,400,219	49,669,535	

- **How do these budgets differ from the authorized budgets from D.21-06-015?**

SCE's 2023 budget is aligned with the budgets authorized in D.21-06-015.

- **Are they higher or lower than 2022, and 2024?**

SCE's budgets are lower than the previous program cycle 2017-2020. However, the 2023 authorized budget is higher than program year (PY) 2022 and lower than the 2024 budget.

- **Have the IOUs supplemented or plan to supplement these authorized budgets with additional funds, such as from committed and unspent funds, fund shifting from within the program, or fund shifting from another program?**

SCE may supplement the 2023 budgets with Single-family Affordable Solar Homes Program (SASH)/Multifamily Affordable Solar Housing (MASH) funding as directed in D.15-01-027 and potentially from a fundshift from the CEH pilot to the ESA Core program.

- **How have the IOUs communicated their 2023 Program Year budgets and other program changes to their implementers and contractors?**

SCE has not yet communicated the PY2023 budgets to individual contractors since contracts have not yet been awarded for the ESA Core program. Typically, this is communicated during the Purchase Order (PO) stage of solicitations which SCE anticipates will occur within the first week of December 2022.

2. What approaches are the IOUs taking to achieve deeper energy savings starting in 2023? What are the challenges associated with these approaches?

For 2023, SCE plans to identify customers who fall within the Basic or Basic Plus tier based on their energy usage and provide leads to contractors for the ESA Core program. This will help determine which customers may achieve deeper energy savings.

- The following challenges may arise with this new approach:
 - Customers may want measures they are not eligible for. For instance, a customer may be in a hot climate zone, but does not qualify for an HVAC because they have low usage
 - SCE forecasts similar constraints (e.g., supply chain, impact to workforce, etc.) in PY 2023

SCE

- To mitigate these challenges, SCE will ensure that contractors are trained and well equipped to discuss the tiered model approach to our customers. Additionally, all of our customer facing materials will also include information about the ESA program's Basic and Basic Plus offering as well as the program's focus on energy efficiency.

3. Do IOUs plan to extend current contracts / what is the timeline for new contracts?

SCE plans to only extend contracts for its exiting MF In Unit and MF CAM contractors until the Southern MFWB program is implemented. Any remaining customers will be provided as lead to the MFWB contractor. However, new contracts will become effective on January 1, 2023 for SCE's ESA Core program contractors. By December 2022, new contractors can begin to schedule appointments for January 2023. By January 2023, SCE plans to pull remaining customers from waitlist, determine eligibility, analyze usage and provide leads to its new contractors. By January 2023, new contractors can begin scheduling customer visits and installations.

4. What are the IOUs' overall plans in terms of program transition?

- **For example, how do the IOUs plan to extend contracts with current implementers and contractors until any new contracts (resulting from all the solicitations in 2022) are in place?**

Please refer to SCE's Q.3 response. SCE does not plan to extend contracts for the ESA Core contractors. SCE transition plans will ensure there is no gap in service to its customers.

5. What challenges do the IOUs foresee in 2023 and how do they plan to mitigate them?

SCE believes the following challenges may arise during the PY2023:

- Implementing new policies or procedures such as contractors providing all services to a customer (previously this was separated)
 - Mitigation: communication, training, discuss inspection results, and job shadowing in the field
- Learning to work with new contractors and learn the program
 - Mitigation: contractor training, constant communication between SCE program team and contractor staff
- Having customers understand the Tiered offering
 - Mitigation: improved website, new marketing material, training contractors
- Transitioning to our new database
 - Mitigation: training and engaging contractors during system testing

SCE

6. Please provide an update on Marketing.

- **When will the 2023 marketing outreach begin?**
- **What is envisioned for the efforts?**

SCE marketing efforts (direct mail) will begin in January 2023. SCE is targeting customers who have not been previously served by the program. Customers will already be identified as Basic or Basic Plus. SCE will coordinate marketing efforts with the contractors so that when the customers receive direct mail in parallel.

- **How do the IOUs leverage CARE/FERA data to generate leads?**

In January, SCE will be targeting FERA customers who are now newly eligible for the program.

- **SCE/SoCalGas: Describe the referral process so that the ESA customer can benefit from a single visit to install all eligible measures? (The Commission over the years has ruled that single fuel utilities should collaborate their ESA programs.)**

SCE and SoCalGas plan to share and leverage enrollment information. However, this may not always occur on the initial customer visit. As mentioned in response#2, in 2023 SCE's customer target list may vary considerably from SoCalGas' target customers for the following reasons:

- SCE is offering building electrification measures in this cycle
- SCE high usage customers (eligible for Basic Plus) may not be SoCalGas's high usage customers

Low Income Oversight Board, LIEAP Subcommittee Meeting
Wednesday, 11/30, 10-12 pm
SoCalGas Responses

1. What are the IOUs budgets for the 2023 Program Year?

SoCalGas response: **SoCalGas’s budget for the 2023 Program Year is \$122,824,705.**

Table 10: ESA Approved Budgets (SoCalGas)⁹

SoCalGas Approved Budgets by Category							
	2021 (July 1 to Dec. 31)	2022	2023	2024	2025	2026	Total
EE Subtotal (A+B)	\$61,165,214 ⁹	\$104,432,051	\$104,315,034	\$104,104,320	\$103,801,243	\$103,408,497	\$581,226,359
EE (A)		\$82,826,162	\$82,837,720	\$82,880,025	\$82,850,295	\$82,844,757	
EE-MF (B)		\$21,605,889	\$21,477,314	\$21,224,295	\$20,950,948	\$20,563,740	
Training Center	\$535,603	\$1,066,865	\$777,697	\$794,031	\$810,413	\$827,048	\$4,811,658
Workforce Education and Training	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Inspections	\$791,002	\$1,606,551	\$1,510,696	\$1,536,622	\$1,561,997	\$1,586,833	\$8,593,701
Marketing and Outreach	\$689,766	\$1,383,806	\$1,398,505	\$1,413,383	\$1,437,876	\$1,462,019	\$7,785,355
Statewide Marketing and Outreach	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Studies	\$112,500	\$218,750	\$262,500	\$168,750	\$231,250	\$75,000	\$1,068,750
Regulatory Compliance	\$241,166	\$495,468	\$472,833	\$523,227	\$536,772	\$513,413	\$2,782,880
General Administration	\$3,485,201	\$6,993,078	\$7,478,835	\$7,662,963	\$7,855,757	\$8,050,562	\$41,526,395
SPOC	\$133,557	\$275,227	\$283,336	\$291,503	\$299,829	\$308,278	\$1,591,731
CPUC Energy Division	\$46,215	\$95,203	\$98,059	\$101,001	\$104,031	\$107,152	\$551,661
Subtotal - Admin	\$5,901,453	\$11,859,721	\$11,999,126	\$12,199,978	\$12,538,096	\$12,622,027	\$67,120,401
Program Total	\$67,066,667	\$116,291,771	\$116,314,160	\$116,304,297	\$116,339,339	\$116,030,525	\$648,346,760
Staff Proposal Pilot Total		\$6,510,545	\$6,510,545	\$6,510,545	\$6,510,545	\$6,510,545	\$32,552,726
Portfolio Total	\$67,066,667	\$122,802,317	\$122,824,705	\$122,814,843	\$122,849,884	\$122,541,070	\$680,899,486

a. How do these budgets differ from the authorized budgets from D.21-06-015?

SoCalGas response: **Budgets are the same as the authorized budgets from D.21-06-015.**

b. Are they higher or lower than 2022, and 2024?

SoCalGas response: **Program Year 2023’s budget is higher than Program Year 2022 by \$22,388. The Program Year 2023 budget is higher than the Program Year 2024 budget by \$9,862.**

c. Have the IOUs supplemented or plan to supplement these authorized budgets with additional funds, such as from committed and unspent funds, fund shifting from within the program, or fund shifting from another program?

SoCalGas response: **SoCalGas has not supplemented, nor do we plan to supplement the authorized budget, as outlined in Table 10 in the response to Q1 above, with committed or unspent funds or from fund**

shifting with other programs. SoCalGas may shift funds within program categories for ESA Main or from year to year for Pilot Plus and Pilot Deep as provided for in D.21-06-015.

- d. How have the IOUs communicated their 2023 Program Year budgets and other program changes to their implementers and contractors?

SoCalGas response: **SoCalGas has held periodic all-hands contractor meetings, as well as 1x1 contractor meetings regarding budgets and program changes. In addition, SoCalGas has sent communications via email and through the HEAT system, our technology platform that allows us to include announcements and alerts.**

2. What approaches are the IOUs taking to achieve deeper energy savings starting in 2023? What are the challenges associated with these approaches?

SoCalGas response: **SoCalGas restructured agreements and compensation for 2023 to align with the new ESA Program focus on achieving therm savings. SoCalGas also modified contractor training, provided email notifications and updated the software technology platform to shift focus to therm savings goals and installing high therm saving measures. A primary challenge of the focus on achieving therms savings is balancing it with addressing customers' health, comfort and safety needs through certain measures which provide little to no reportable savings towards the goal.**

3. Do IOUs plan to extend current contracts / what is the timeline for new contracts?

SoCalGas response: **SoCalGas is not extending current (2022) contracts. SoCalGas is executing new contracts with successful bidders in SoCalGas' Main ESA Program solicitation which will be effective on January 1, 2023.**

4. What are the IOUs' overall plans in terms of program transition?

- a. For example, how do the IOUs plan to extend contracts with current implementers and contractors until any new contracts (resulting from all the solicitations in 2022) are in place?

SoCalGas response: **2023 contracts with successful bidders in SoCalGas' Main ESA Program solicitation will be effective on January 1, 2023. SoCalGas is currently in the contract execution phase and is awarding and issuing contracts to contractors that are continuing into 2023, as well as new contractors beginning in 2023.**

7. What challenges do the IOUs foresee in 2023 and how do they plan to mitigate them?

SoCalGas response: **SoCalGas will continue to face challenges in optimizing its measure delivery to achieve its 2023 savings goal while balancing customers'**

SoCalGas

health, comfort and safety needs through certain measures which provide little to no reportable savings towards the goal. SoCalGas is working with its contractor network to achieve its program goals by assigning individual savings goals, implementing savings related KPIs and performance-based incentives.

8. Please provide an update on Marketing.

a. When will the 2023 marketing outreach begin?

SoCalGas response: **The ESA Program is promoted year-round via traditional outreach in tandem with other SoCalGas assistance programs including CARE. In the first quarter of 2023 the ESA Program will be included in a SoCalGas Assistance Programs Umbrella Advertising Campaign in order to leverage the Winter timeframe.**

b. What is envisioned for the efforts?

SoCalGas response: **ESA Marketing going forward will focus on specific measures delivering the highest therm savings. SoCalGas will develop microtargeted advertising campaigns to create high level awareness of the ESA Program, and drive customer interest to an online intake form. This intake form will be enhanced in Q1 2023, to capture additional qualifying customer information upfront that may help contractors prioritize their outreach. SoCalGas will also develop ad templates for contractor use.**

c. How do the IOUs leverage CARE/FERA data to generate leads?

SoCalGas response: **SoCalGas does not automatically create ESA Program leads for customers enrolled into CARE, instead SoCalGas sends emails, texts, and direct mail letters to current CARE customers in areas with the lowest ESA Program enrollment percentages and in disadvantaged communities. SoCalGas also leverages CARE enrollment to get ESA Program messaging to customers via My Account.**

d. SCE/SoCalGas: Describe the referral process so that the ESA customer can benefit from a single visit to install all eligible measures? (The Commission over the years has ruled that single fuel utilities should collaborate their ESA programs.)

SoCalGas response: **SoCalGas and SCE plan to continue sharing and leveraging enrollment information. This coordination may not always occur during the initial customer visit as each IOU may be targeting different customers initially based on their unique customer profile, but coordination will continue.**

SDGE

IOU Questions for meeting on 11/30 (10am – Noon)

1. What are the IOUs budgets for the 2023 Program Year?

Program	Budget PY 2022	Budget PY 2023	Budget PY 2024
Portfolio Total	\$25,832,330	\$27,043,980	\$29,894,951

Note: The Portfolio total consist of all the approved programs i.e., ESA main, MF CAM, MFWB - SDG&E only, and Pilot Plus and Pilot Deep. In addition, SDG&E is authorized to use MF CAM funds in 2022 and 2023 until the program transitions to MFWB.

a. How do these budgets differ from the authorized budgets from D.21-06-015?

SDG&E Response: The program budgets do not differ from the budgets authorized in D.21-06-015 (Decision).

b. Are they higher or lower than 2022, and 2024?

SDG&E Response: Please refer to the table above.

c. Have the IOUs supplemented or plan to supplement these authorized budgets with additional funds, such as from committed and unspent funds, fund shifting from within the program, or fund shifting from another program?

SDG&E Response: Pursuant to D.15-01-027, and subject to advice letter approval in early 2023, SDG&E will have the opportunity to supplement the authorized ESA Main budget by utilizing the unspent SASH/MASH funding which is approximately \$200K. At this time, SDG&E does not have any additional plans to supplement its authorized budgets.

d. How have the IOUs communicated their 2023 Program Year budgets and other program changes to their implementers and contractors?

SDG&E Response: SDG&E has held individual meetings and all hands meeting to communicate ESA upcoming program changes to contractors.

SDGE

IOU Questions for meeting on 11/30 (10am – Noon)

For Pilot, the RFP Solicitation Plan was noticed on August 17, 2022 to service lists A.14-11-007 et al., A.19-11-03 et.al., R.13-11-005, R.15-03-010, R.18-07-006, R.18-07-005 and GO96B. Additionally, it is on SDG&E's website at [Energy Savings Assistance Programs Solicitations | San Diego Gas & Electric \(sdge.com\)](https://www.sdge.com/energy-savings-assistance-programs-solicitations) and on Power Advocate. A Public Workshop was held on September 27, 2022. Additionally, direct email outreach was sent to potential bidders and interested parties on October 31, 2022 and CBO partners on November 4, 2022.

IOU Questions for meeting on 11/30 (10am – Noon)

2. What approaches are the IOUs taking to achieve deeper energy savings starting in 2023? What are the challenges associated with these approaches?

SDG&E Response: For ESA Main, the approach is to provide household disaggregated usage data to Implementer/contractors, in addition to responses from the Home Audit Tool. Both will provide insight into measure installation and savings potential and allow for prioritization of services from contractors. Implementer/contractors will also have performance incentives based on savings achieved. Challenges include setting up a process for data flow for the Implementer/contractors, getting customers to take the Home Audit, and distribution of EE kits for the low savings potential households.

For Pilot, the approach is to focus on customers with the highest energy usage and the greatest need, specifically in Climate Zones where weather conditions require more energy use for health, comfort, safety. The Pilot will utilize a whole-home approach and all measures with savings values are proposed to be included since cost effectiveness is not a threshold for installation. Challenges include contractor familiarity with whole-home energy modeling software and the coordination of multiple contractors for mitigation efforts and measure installation.

SDGE

IOU Questions for meeting on 11/30 (10am – Noon)

3. Do IOUs plan to extend current contracts / what is the timeline for new contracts?

SDG&E Response:

For ESA Main, the new Implementer model contract takes effect on January 1, 2023, which excludes HVAC and Water Heating Repair and Replacement. The current HVAC contractor agreement has been extended until mid-July 2023 and the HVAC RFP will be issued in January 2023. SDG&E will also continue with its current ESA CAM contractor until the MFWB Program is launched and ready for customer enrollment.

For Pilot, the RFP responses are due on Jan 26, 2023. The contract for implementation is expected to be finalized in May 2023 and program participation will open in July 2023.

SDGE

IOU Questions for meeting on 11/30 (10am – Noon)

- 6. 4. What are the IOUs' overall plans in terms of program transition?
 - a. For example, how do the IOUs plan to extend contracts with current implementers and contractors until any new contracts (resulting from all the solicitations in 2022) are in place?

SDG&E Response:

- a. For Main ESA, the new Implementer has been encouraged to interview and develop working arrangements with the current ESA contractors, for a smooth transition of implementation of the program. The HVAC contractor agreement have been extended for six months under the same terms and conditions.

Transition plans are not applicable for the new Pilot program.

SDGE

IOU Questions for meeting on 11/30 (10am – Noon)

5. What challenges do the IOUs foresee in 2023 and how do they plan to mitigate them?

SDG&E Response: At this time, SDG&E does not anticipate any specific challenges in 2023, however SDG&E intends to keep LIEAP Subcommittee informed of any specific challenges, if they arise. In general, SDG&E expects to see an increase in the need for flexibility and adaptability, in order to address the numerous program changes and mitigate any issues.

IOU Questions for meeting on 11/30 (10am – Noon)

9. Please provide an update on Marketing.

a. When will the 2023 marketing outreach begin?

SDG&E Response:

For Main ESA, marketing will begin early 2023.

For Pilot, marketing may begin during the latter half of the Implementer ramp up period, scheduled for June 2023, but it depends on the final outcome of contract negotiations.

SDG&E's Outreach team continuously promotes the ESA program through its Energy Solutions Partner network, consisting of more than 200 Community-based Organizations. In 2023, SDG&E will immediately begin educating this network on the changes to the ESA program, while providing updating marketing materials, social media content and presentations to be shared with the CBOs constituents.

b. What is envisioned for the efforts?

SDG&E Response:

For Main ESA, marketing activities include direct mail and email campaigns, plus a digital advertising campaign. Contractors will also begin canvassing.

For Pilot, the marketing activities will most likely include creating flyers and/or fact sheets to help leverage CBO partners to drive awareness, sending direct mail and email to eligible customers regarding the participation opportunity, launching a dedicated webpage on sdge.com, and producing a Welcome Kit for customers.

To ensure all CBOs within SDG&E's Network are prepared to share information on the ESA program, updated social media content and marketing materials will be provided. These materials will be shared during community events, presentations, and other external engagement opportunities.

c. How do the IOUs leverage CARE/FERA data to generate leads?

SDG&E Response:

For all ESA programs, the CARE/FERA data is the starting point for direct marketing, targeted outreach and lead generation. The lists of CARE/FERA customers may include further segmentation by properties, zip codes, climate zones, energy usage and need states to assist with prioritization and messaging.

SDGE

IOU Questions for meeting on 11/30 (10am – Noon)

All CBOs within SDG&E's Energy Solutions Partner Network discuss the ESA program when working with constituents interested and/or eligible for the CARE/FERA programs.

SDG&E leverages the ESA program through its network of CBOs, particularly its ~20 CARE Capitation partners, who assist with direct enrollment support in both the CARE and FERA programs.

- d. SCE/SoCalGas: Describe the referral process so that the ESA customer can benefit from a single visit to install all eligible measures? (The Commission over the years has ruled that single fuel utilities should collaborate their ESA programs.)

SDG&E Response: This question is directed to SCE and SoCalGas, therefore, SDG&E is not providing a response to this question.

End of Response



Joint IOUs Program Highlights

Low Income Oversight Board Meeting
December 8, 2022

Sacramento, CA
WebEx

Public

Program Summary – as of 10/31/2022

ESA

Homes treated: 57,128
Annual Energy Savings:

- 20,738,548 kWh
- 959,310 therms

% Expenditure: 59%

CARE

Enrollment: 1,473,774
Enrollment Rate: 105%
Discounts: \$819,312,259
% Adm. Expenditure: 67%

FERA

Enrollment: 36,770
Enrollment Rate: 21%
Discounts: \$14,672,756
% Adm. Expenditure: 70%

Additional Highlights

- PG&E exceeded its annual electric and gas energy savings targets and is on track to meet its targets for homes treated (at 96% of target). Contracts for ESA Main are in place to begin implementation in 2023.
- PG&E has spent 74% of its \$2.5m FERA marketing budget with limited success. PG&E's FERA enrollment continues to hover at 21% (vs its enrollment goal of 40%). In October, PG&E, along with other electric IOUs, met with ED staff to discuss possible pilots to improve enrollment and is currently evaluating options for encouraging FERA uptake.
- ESA Pilot Plus/Deep (PP/PD) began implementation in the second half of 2022. PG&E plans to shift an estimated \$7M in unspent pilot funds from PY 2022 to PY 2023-2025.
- PG&E's SPOC program referred 391 multifamily customers to 34 programs YTD, and 62 referrals were converted to program applications. PG&E's One-Stop Model has supported 48 multifamily customers YTD. PG&E's MF CAM program treated 32 properties YTD and is on track to exceeds its 2022 treatment target of 33 properties.

Program Summary– as of 10/31/22

CARE

- Customers Enrolled: 1,192,875
- Enrollment Rate: 93%
- Newly Enrolled Customers: 259,846*

FERA

- Customers Enrolled: 25,828
- Enrollment Rate: 12%
- Newly Enrolled Customers: 7,481*

ESA

- Homes Treated: 34,966
- Energy Savings: 17.9 GWh
- Unspent Funds Remaining: \$24.86M

MF CAM

- Properties Treated: 37
- Current Projects: 13
- 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 continue to engage tribal leaders to offer mini grants. The Timbisha Shoshone tribe has accepted our offer.

Disconnections/AMP

- No Disconnections for 2022. Residential credit collection efforts resumed in October 2022
- Conducted AMP Net Energy Metering (NEM) outreach and mailed letters to AMP customers impacted by delayed billing

*Newly Enrolled Customers count is as of September 2022.



Program Overview – as of 10/31/22

CARE

- Customers Enrolled: 354,389
- Enrollment Rate: 122%
- Newly Enrolled Customers: 64,794

ESA

- Homes Treated: 8,774
- kWh Saved: 915,628
- Therms Saved: 11,931

MF CAM

- # of Properties: 17
- kWh Saved: 112,717
- Therms Saved: 1,645

FERA

- Customers Enrolled: 12,161
- Enrollment Rate: 28%
- Newly Enrolled Customers: 1,962

Additional Highlights

Tribal: Tribes completed ESA Meet & Confer - 12

Disconnections/AMP:

- Disconnections - Zero
- AMP - Number of customers enrolled: 15,051
- AMP - Total amount forgiven: \$12.2M

Program Summary– as of 10/31/22

CARE

- Customers Enrolled: 1,776,312
- Enrollment Rate: 110%
- Newly Enrolled Customers: 266,977

ESA Program

- Homes Treated: 81,678
- Therms Saved: 553,748
- Unspent Funds Remaining: \$36.64 M

MF CAM

- Central Boiler Projects: 22
- Impact: 16 bldgs., 2,213 units, 5,500+ tenants
- Therms Saved: 97,443

Additional Highlights

Tribal

- Finalized contract with Tribal Consultant to help roll out outreach strategy and identifying non-federally recognized tribes, and scheduling meetings with Tribes.
- Meetings regarding grants scheduled in November with four Tribes.

Disconnections/AMP

- 110,085 customers enrolled in AMP (as of 10/31/22). Disconnections to resume in Q2 2023.



Joint IOUs Energy Savings Assistance Program Solicitations & Contractor Funding

Low Income Oversight Board Meeting
December 8, 2022

Sacramento, CA
WebEx

Public

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 Assistance Program Solicitation Schedule ALL DATES ARE SUBJECT TO CHANGE	November				December				2024 Calendar			
	11/07	11/14	11/21	11/28	12/05	12/12	12/19	12/26	1/2	1/9	1/16	1/23
Regulatory Requirements Ordering Paragraphs of DUC Decision (D-22-08-022)***												
Joint IOU Events												
SCE	Main ESA (Res/Flt) Program			Contract Awards and Insurance/Program Launch			Program Ramp Up			Open to Participation (1/1/24)		
	ESA Equipment Vendor			Contract Awards and Insurance/Program Launch			Program Ramp Up			Open to Participation (1/1/24)		
	ESA Inspection			Contract Awards and Insurance/Program Launch			Program Ramp Up			Open to Participation (1/1/24)		
	Building Electrification Pilot						Open to Participation (Finalist)					
	Clean Energy Home Pilot						Open to Participation (Finalist)					
	ESA Plus/Deep Implementation Pilot (SCE/SDG&E)**	Open to Participation (1/9)										
	ESA Plus/Deep Evaluation Pilot (SCE/SDG&E)**	Open to Participation (1/9)										
	Building Electrification and Clean Energy Home Pilot Evaluation						Open to Participation (Finalist (1st Qtr 2024))					
	Interactive Energy Education Note: This timeline is preliminary and subject to change based on future program needs being identified.									Open to Participation (Finalist (1/2/24))		
	ESA Systems Note: This timeline is preliminary and subject to change based on future program needs being identified.						IT Development (2024)			Open to Participation (Finalist (1/2/24))		
SoCalGas	Main ESA (Res/Flt) Program (1st Step of new single-family in-home services)										Program Ramp up	
	Customer Experience Technology Platform and Customer Online Self											Contract Negotiations
PG&E	Main ESA (Res/Flt) Program											
	Multi-Family Whole Building Program		Contract Awards/Insurance**		IT Submittals (1/10/24)							ED Review of Advice Letter
	Separable Multi-Family Central Panel				System Launch (1/10)							
	Sub Materials		Contract Awards and Insurance/Program Launch				Program Ramp Up			Open to Participation		
ESA Plus/Flt/Deep												
SDG&E	Main ESA (Res/Flt) Program		Contract Awards and Insurance/Program Launch				Program Ramp Up			Open to Participation (1/1/24)		
	Main ESA (Res/Flt) Program/HAC and Water Heater Repair and Replacement***											MP Release and Bidder Development
	ESA Plus/Deep Pilot											
	ESA Plus/Deep Pilot 2.0											MP Release (1/24/24) and Bidder Development (1st Qtr 1/24/24)
	Multi-Family Whole Building Program			Finalist Letter Submission (1/10/24)								ED Review of Advice Letter
IT Solutions												

Energy Savings Assistance Program

Update on ESA Contractor Funding (Jan-Oct 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. PG&E doesn't expect material change to its PY 2023 budget for ESA Main.	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. SCE is currently pulling from its waitlist
SDG&E	No contractor funding issues	None
SoCalGas	No contractor funding issues	None





Joint IOUs Report of the CARE, FERA and ESA Programs

Low Income Oversight Board Meeting
December 8, 2022

Sacramento, CA
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-Oct 2022 CARE Program Updates*

Authorized 2022 Program Budgets and Expenditures				
Utility	2022 Budget	Expenditures	%	Rate Discounts
PG&E	\$13,760,000	\$9,273,006	67%	\$819,312,259
SCE	\$8,822,256	\$6,088,636	69%	\$574,920,938
SDG&E	\$6,741,045	\$4,383,805	65%	\$191,509,788
SoCalGas	\$10,085,592	\$6,927,447	69%	\$157,603,060
Total	\$39,408,893	\$26,672,894		\$1,743,346,045

Jan-Oct 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%	1,473,774	105%	184,056
SCE	4,835,549	1,276,922	26%	1,192,875	93%	259,846***
SDG&E	1,389,874	289,316	21%	354,389	122%	64,794
SoCalGas	5,722,418	1,609,992	28%	1,776,312	110%	266,977
Total	17,589,206	4,577,932		4,797,350		775,673

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

** Total households enrolled includes sub-metered households.

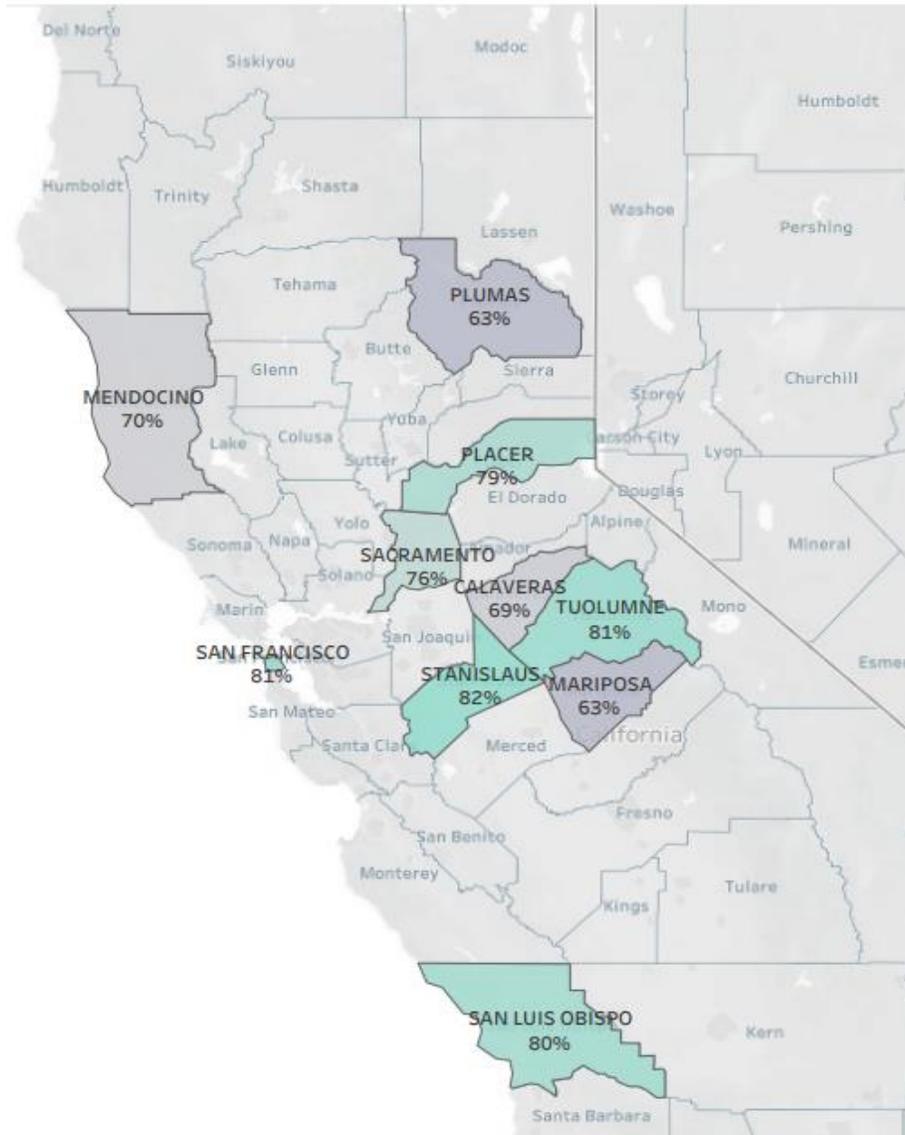
*** Newly Enrolled Customers count is as of September 2022.



CARE Program *CARE Enrollment map*



PG&E



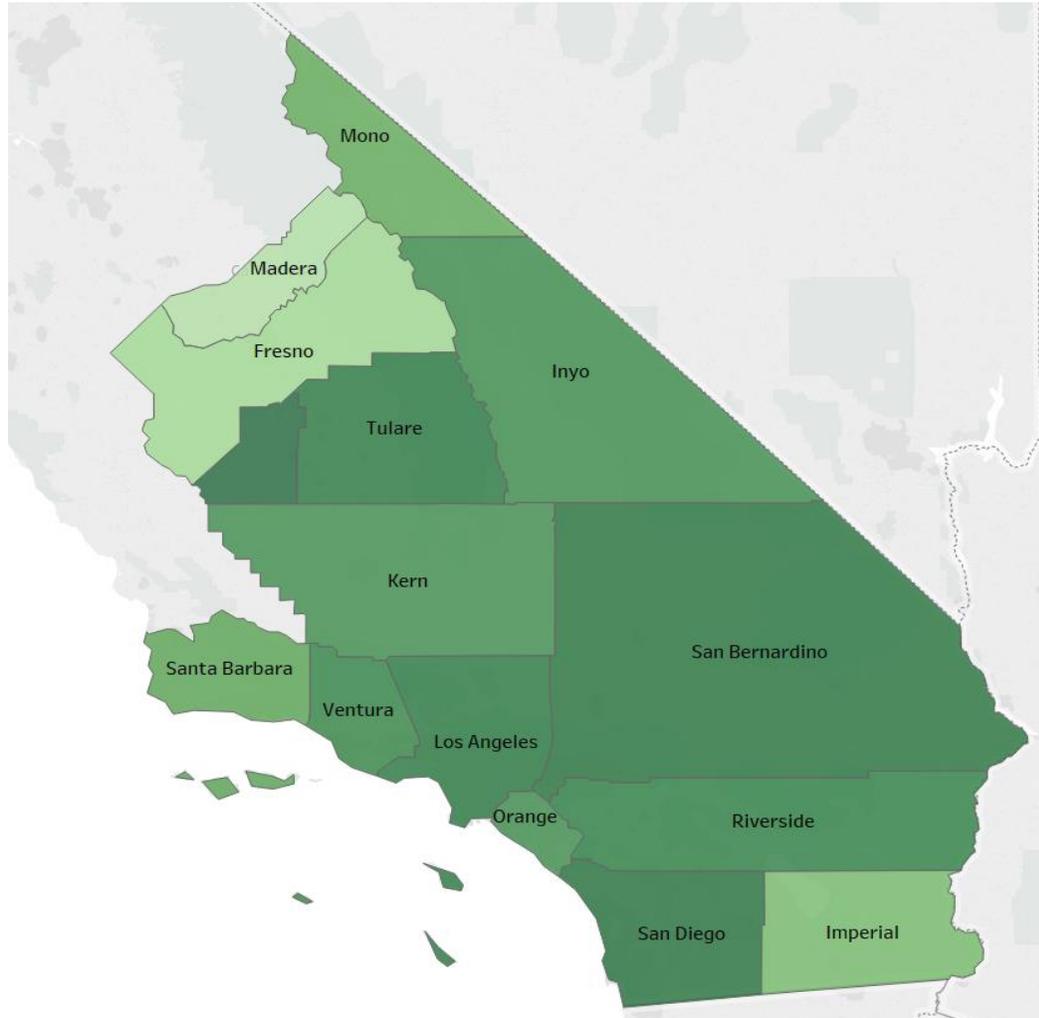
PG&E Counties With Lowest Enrollment Rates	
County	Enrollment Rate*
PLUMAS	63%
MARIPOSA	63%
CALAVERAS	69%
MENDOCINO	70%
SACRAMENTO	76%
PLACER	79%
SAN LUIS OBISPO	80%
SAN FRANCISCO	81%
TUOLUMNE	81%
STANISLAUS	82%

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

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

CARE Program *CARE Enrollment map*

SCE



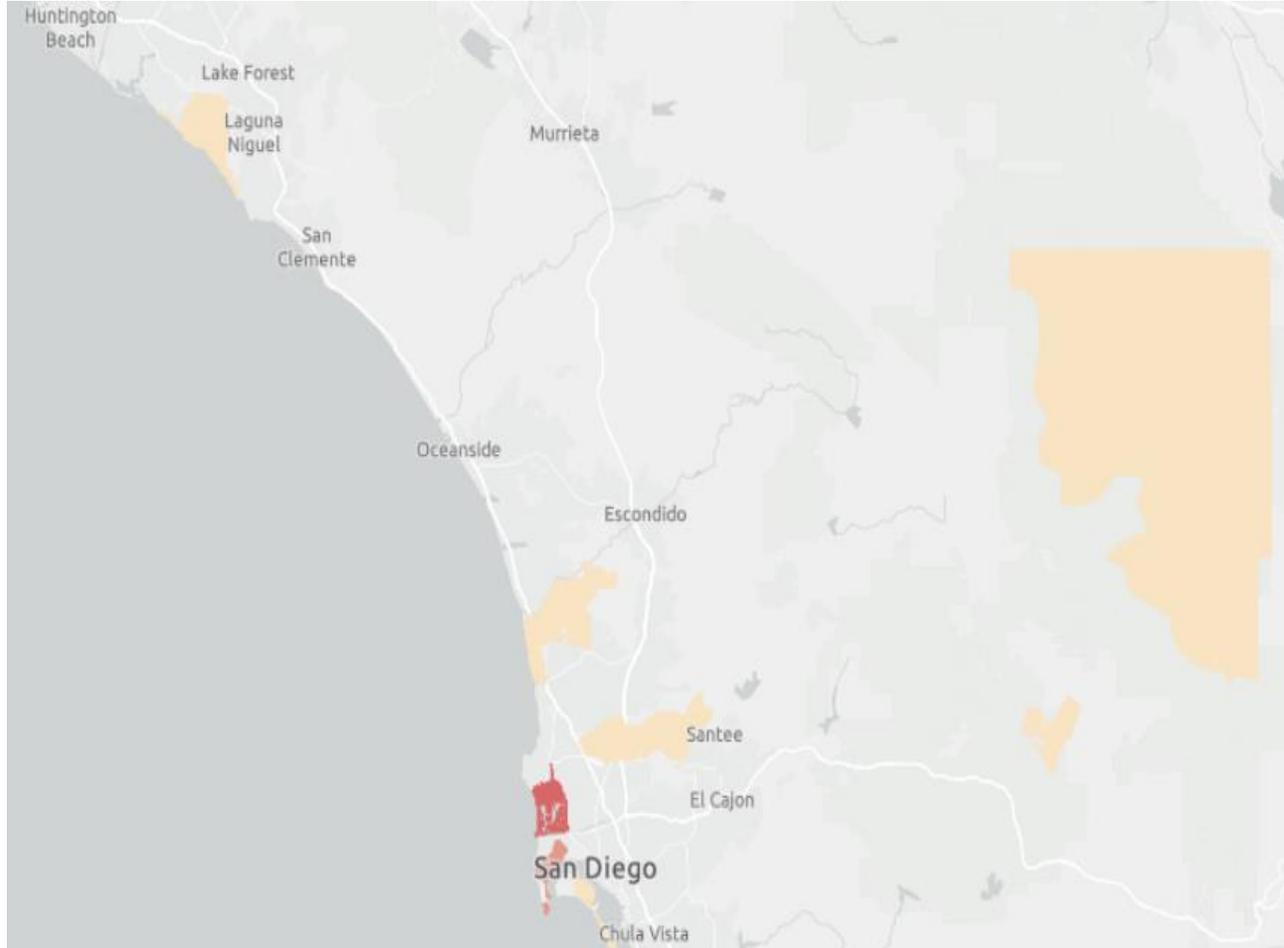
County	Enrollment Rate*
Kings	111%
Riverside	110%
Tulare	104%
Los Angeles	97%
San Bernadino	93%
Ventura	81%
Orange	79%
Kern	72%
Inyo	70%
Santa Barbara	62%
Mono	33%

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

CARE Program *CARE Enrollment map*



SDG&E



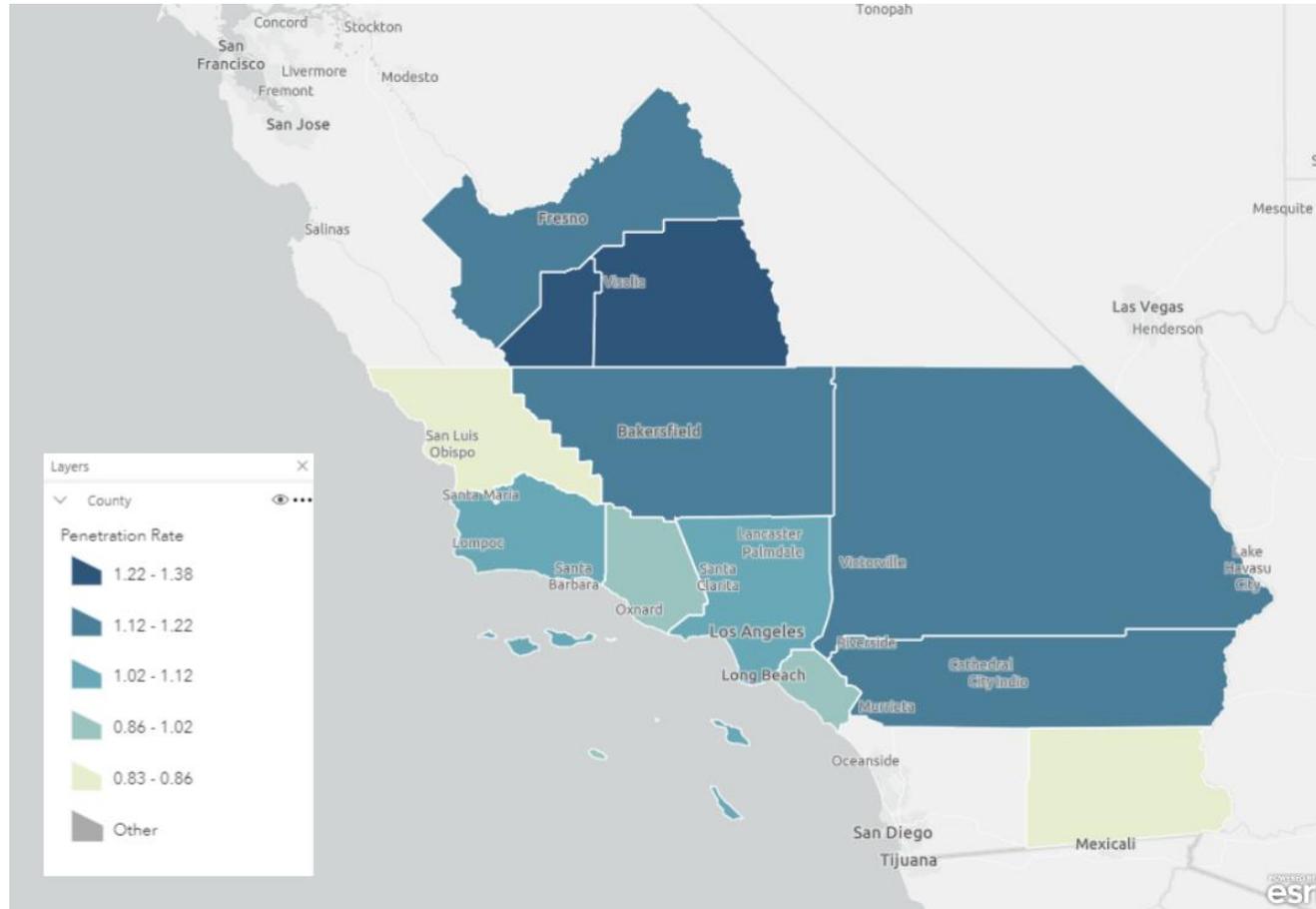
Zip codes with lowest enrollment (overall)	
City	Enrollment Rate
Miramar	11%
Rancho Santa Fe	13%
Mount Laguna	21%
Coronado	34%
Laguna Beach	38%
Del Mar	51%
Solana Beach	60%
San Diego (Loma Portal)	61%
San Diego (Pacific Beach)	63%
Borrego Springs	71%

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

CARE Program *CARE Enrollment map*



SoCalGas



County	Enrollment Rate *
Kings	138%
Tulare	139%
San Bernardino	123%
Fresno	118%
Kern	119%
Riverside	119%
Santa Barbara	111%
Los Angeles	108%
Ventura	101%
Orange	97%
Imperial	85%
San Luis Obispo	81%

*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-Oct 2022 FERA Program Updates*

Authorized 2022 Program Budgets Expenditures				
Utility	2022 Budget	Expenditures	%	Rate Discounts
PG&E	\$2,794,400	\$1,962,092	70%	\$14,672,756
SCE	\$1,286,280	\$796,687	62%	\$9,894,715
SDG&E	\$703,150	\$233,231	33%	\$3,992,094
Total	\$4,783,830	\$2,992,010		\$28,559,565

Jan-Oct 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%	36,770	21%	10,923
SCE	4,835,549	221,674	5%	25,828	12%	7,481***
SDG&E	1,389,874	43,709	3%	12,161	28%	1,962
Total	11,028,266	439,602		74,759		20,366

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

** Despite expending 74% of its marketing and outreach budget, PG&E enrollment rate is forecasted to fall short of the 40% goal.

*** Newly Enrolled Customers count is as of September 2022.

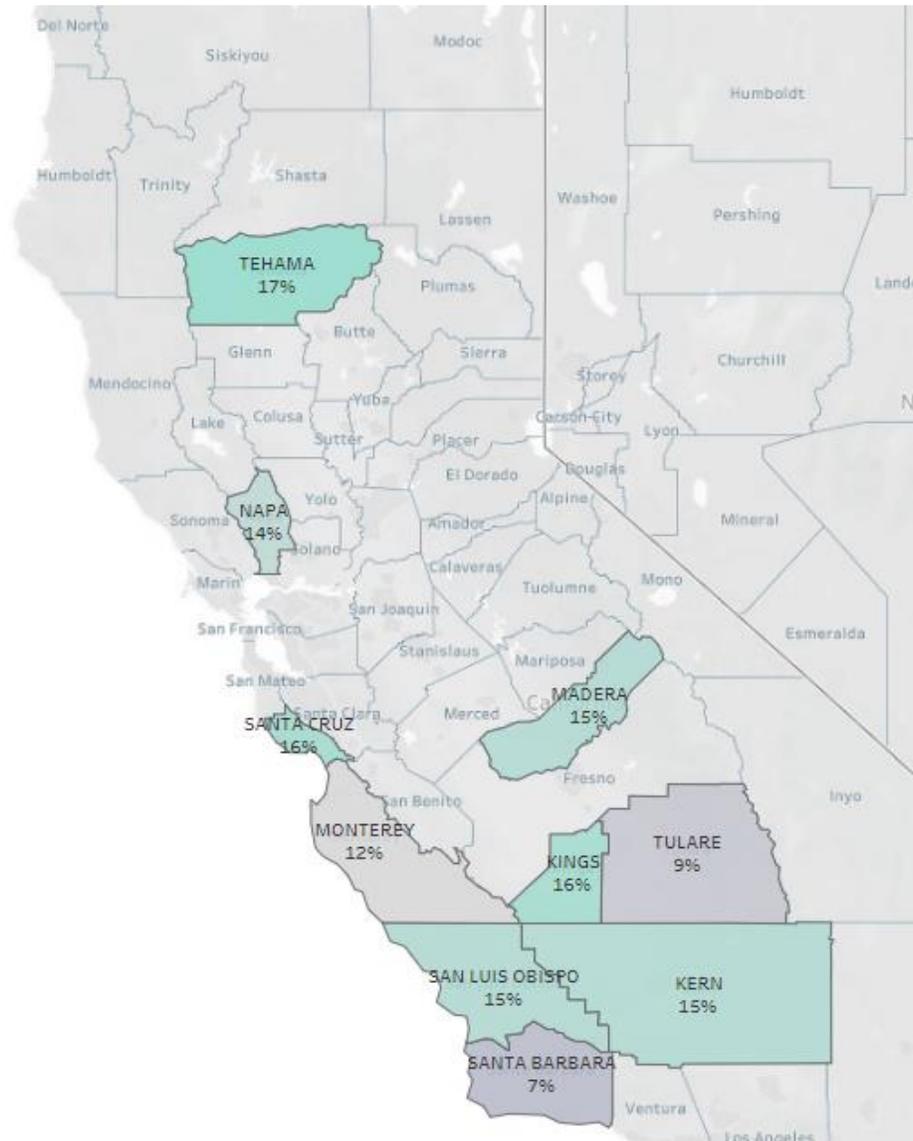


Public



FERA Program *FERA Enrollment map*

PG&E



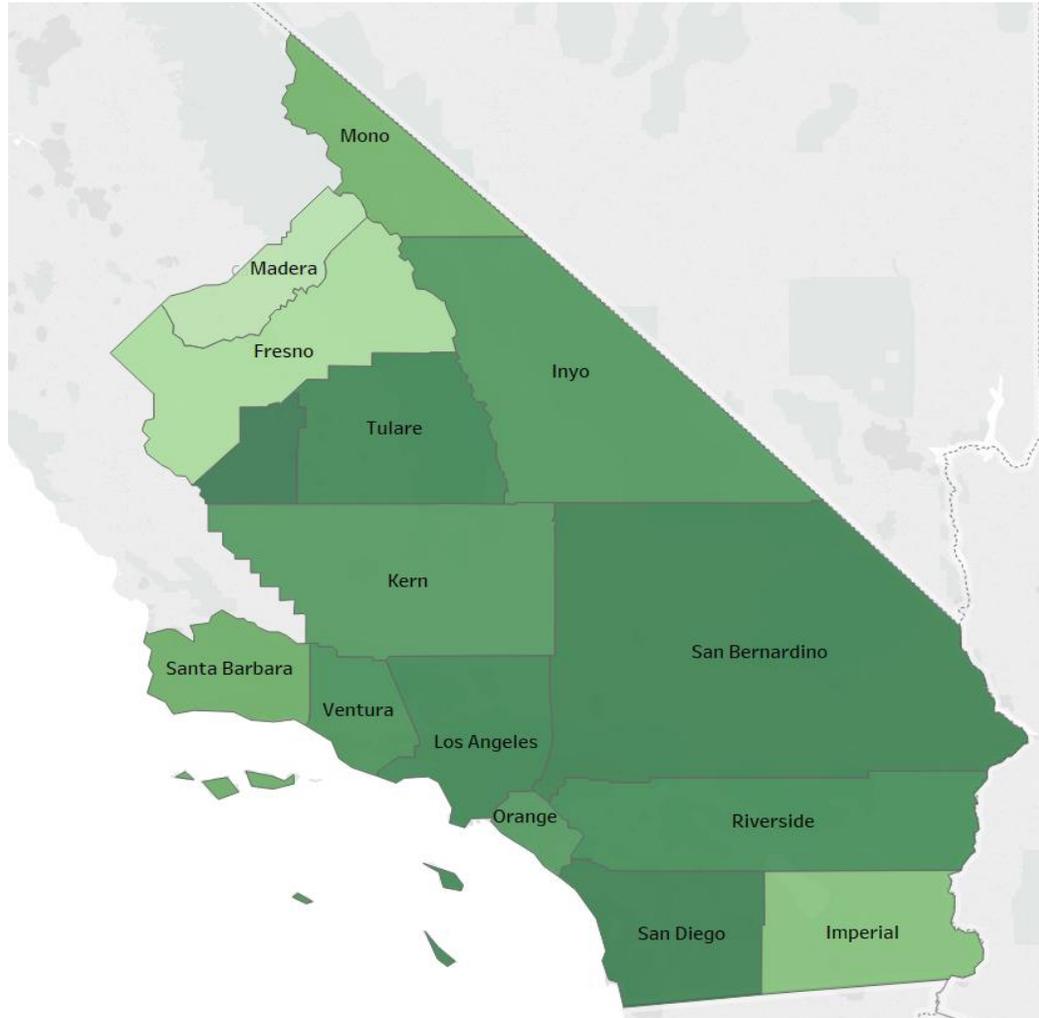
PG&E Counties With Lowest Enrollment Rates	
County	Enrollment Rate*
SANTA BARBARA	7%
TULARE	9%
MONTEREY	12%
NAPA	14%
MADERA	15%
SAN LUIS OBISPO	15%
KERN	15%
KINGS	16%
SANTA CRUZ	16%
TEHAMA	17%

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

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

FERA Program *FERA Enrollment map*

SCE



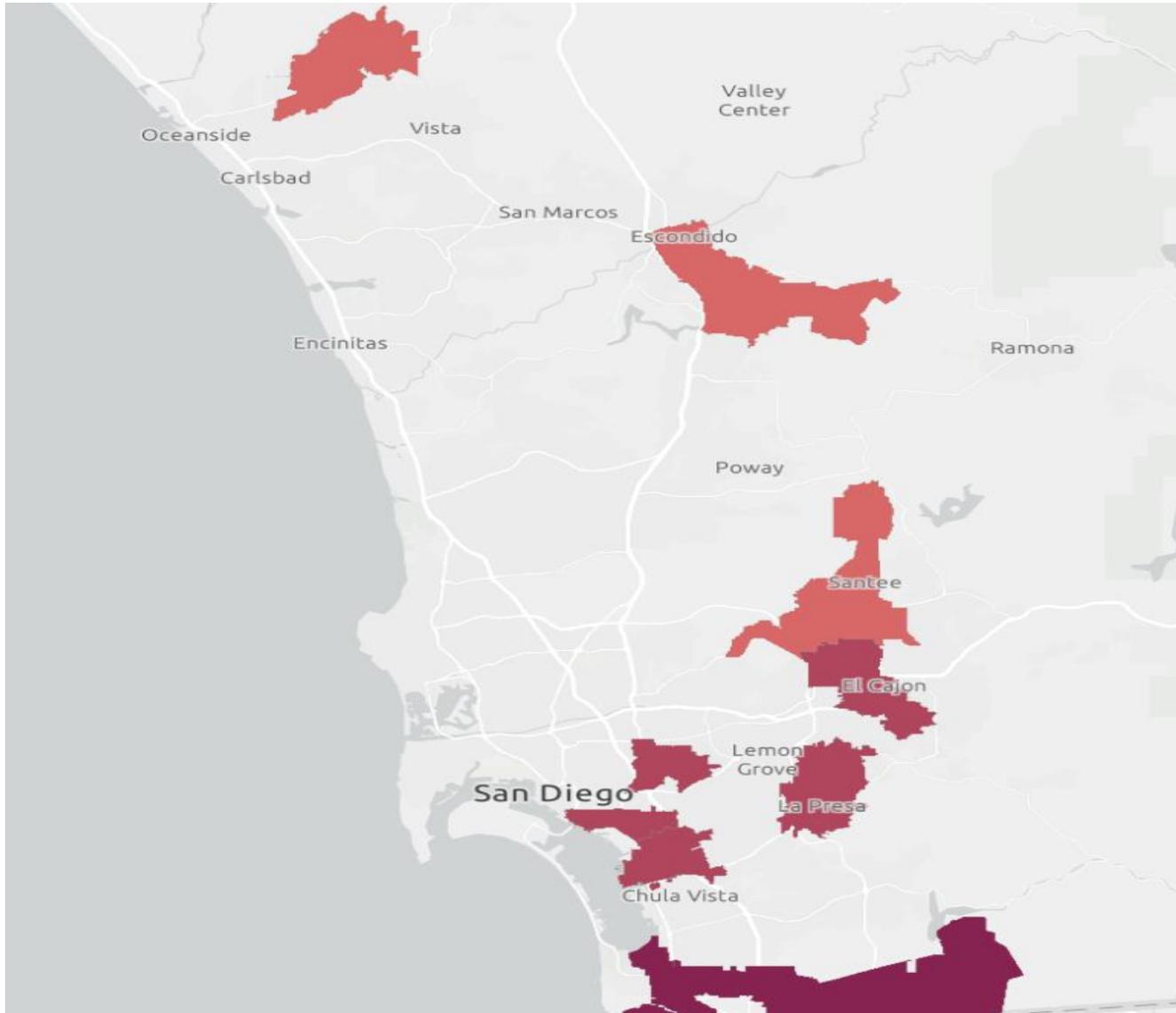
County	Enrollment Rate*
Riverside	14%
Orange	13%
San Bernadino	12%
Los Angeles	11%
Kern	10%
Kings	10%
Tulare	10%
Ventura	10%
Santa Barbara	8%

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

FERA Program *FERA Enrollment map*



SDG&E



Public

Zip codes with lowest enrollment (overall)	
City	Enrollment Rate
San Diego (College Area)	21%
Oceanside	23%
Escondido	23%
San Ysidro	29%
National City	29%
San Diego (southeast)	30%
Spring Valley	32%
San Diego (south bay)	33%
El Cajon	41%
Santee	44%

*Represents SDG&E zip codes with the lowest enrollment rates, October 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-Oct 2022) *

Utility	Authorized Budget ¹	YTD Expenditures ²	%
PG&E	\$180,979,812	\$107,350,877	59%
SCE ⁴	\$75,300,964	\$51,019,168	68%
SDG&E	\$27,432,330	\$11,905,034	43%
SoCalGas	\$116,291,772	\$79,637,620	68%
Total	\$400,004,878	\$249,912,699	62%

* Jan-Oct 2022 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed November 21, 2022.

¹ Authorized budgets pursuant to D.21-06-015. Jan-Oct 2022 as reported in the IOU ESA-CARE-FERA Monthly Report filed November 21, 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 ESA Pilot Plus/Deep: PG&E plans to shift approximately \$7M in unspent 2022 pilot funds into program years 2023, 2024 and 2025.

⁴ 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-Oct 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	20,738,548	959,310	364,019,616	19,126,454	5.7%	5.0%	15,093,167	629,105
SCE	17,897,548	N/A	221,863,063	N/A	8.1%	N/A	18,788,420	N/A
SDG&E	915,628	11,931	38,535,408	2,126,818	2.4%	0.6%	2,955,161	127,171
SoCalGas	N/A	553,748	N/A	26,581,288	N/A	2.1%	N/A	1,435,220
TOTAL	38,985,329	1,524,989	624,418,087	47,834,560			36,836,748	2,191,496

¹ Jan-Oct 2022 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed November 21, 2022.

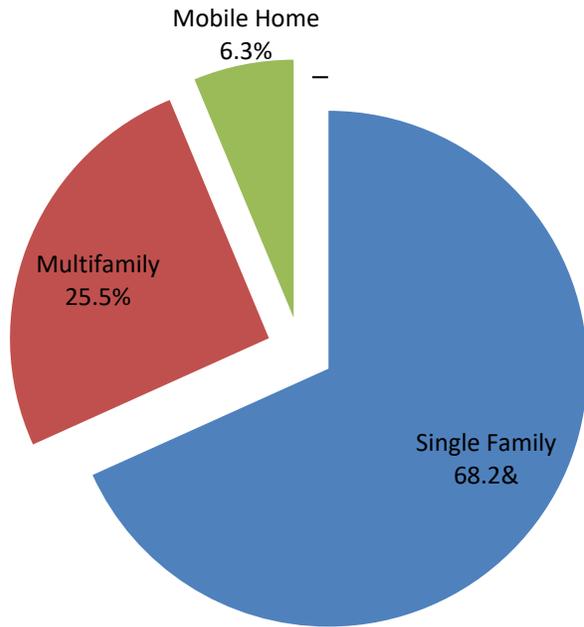
² Derived from average CARE Customers Usage for PY 2021 (Annual Report CARE Table 9) multiplied by January 1- October 31, 2022 homes treated and annualized.

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



Energy Savings Assistance Program

SW Participation By Type



2022 Households Treated (Jan-Oct 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	57,128	96%	3.13%
SCE	27,051	34,966	129%	2.80%
SDG&E	13,760	8,774	64%	2.35%
SoCalGas	94,600	81,678	86%	3.5%
Total	194,751	182,546		

¹ Jan-Oct2022 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed November 21, 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-Oct 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 October 2022, PG&E's SPOC program has referred 391 multifamily customers to 34 programs YTD, and 62 referrals have been converted to program applications. PG&E's One-Stop Model has supported 48 multifamily customers YTD.
- **SCE:** For 2022, SCE has been authorized to spend \$1,800,000 for MF CAM. SCE has 13 projects in progress and continues to accept new projects. We expect to exhaust all funding by the end of the year. SCE will continue running MF CAM until the Southern Multifamily Whole Building (MFWB) Program is open to participation in 2023.
- **SDG&E:** As of October, SDG&E's SPOC has conducted 121 referrals across SDG&E's multifamily programs.
- **SoCalGas:** Through October 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:** In October 2022, PG&E's ESA MF CAM program treated 95 buildings and four properties with 77,623kWh and 11,942 therm saved, bringing the YTD properties treated to 32. PG&E is on track to exceeds its 2022 treatment target of 33 properties. As of October 2022, PG&E has 14 projects in the pipeline that are expected to be treated by the end of the year.
- **SCE:** As of October 2022: Deed Restricted: In progress – 13 Whole Building, 1 Common Area, 1 In-Unit. Deed Restricted: Completed – 37 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 October 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 17 properties, benefiting 114 buildings and 1,080 MF Tenant units.
- **SoCalGas:** As of October 31, 2022, SoCalGas has completed 22 central boiler projects. These projects have impacted 2,213 units, 28 buildings, and improved the health, safety, and comfort of over 5,500 tenants. These projects have annual therm savings of 97,443. In additional, there are currently 16 active CAM projects in various stages of completion.

ENERGY EDUCATION

The IOUs will collectively work on developing utility neutral online education. The existing Energy Education Resource Guide will be used until revised materials are approve and implemented in 2023.

Tribal Community Outreach Update



Compliance/Outreach Activities as of October 2022	Successes/Challenges
<ul style="list-style-type: none">• In September 2022, PG&E awarded its first Tribal Outreach Grant to the Tejon Tribe — the grant provides funding to the tribe to support their efforts to educate and inform tribal members about ESA and other relevant programs and services to encourage tribal members’ enrollment and participation.• In October 2022, PG&E invited Tribes, TANF and Tribal Housing Authority staff to a meeting to provide feedback on the Tribal Outreach Grant Program. This invitation was sent to 62 Federally Recognized tribes, 40 Non-Federally Recognized tribes, 30 Tribal Housing Authority Offices, and eight TANF agencies. A total of 16 tribal staff members responded to the meeting request and provided input on recommended changes for the Tribal Grant Program.	<ul style="list-style-type: none">• PG&E continues its efforts to work directly with Tribes, TANF and Tribal Housing Authority staff to better understand the varying needs of the tribal communities so PG&E can improve its program delivery to tribal communities.• PG&E looks forward to evaluating the feedback received and implementing improvements in response for the 2023 Tribal Outreach Grant program.

Tribal Community Outreach Update



Outreach Activities	Number of Participating Tribes*
Tribes completed ESA Meet & Confer	9
Tribes requested outreach materials or applications	1
Tribes who have not accepted offer to Meet and Confer	0
Non-Federally Recognized Tribes who participated in Meet & Confer	0
Tribes and Housing Authority sites involved in Focused Project/ESA	1
Partnership offer on Tribal Lands	102
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	38
Housing Authority and TANF offices who participated in Meet and Confer	4

* A list of tribes and tribal organizations are identified in ESA Table 9 of PG&E’s monthly program report. The information is aggregated for this presentation for readability.

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 October 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 [20]	1,967	2	0%	3	67%	545.13	545.13	0.07	3.82	3.82	\$ 2,176

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 2023.

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 Offerings: Upon completion of 3 meetings, the Timbisha Shoshone Tribe has accepted our offer. Efforts to schedule meetings with all tribes is ongoing. • Attended Pechanga Open House Event – 10/13/22 	<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 • Challenge: mini grant acceptance

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 September 2022**

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 (Energy Saving and HCS Measure) [4]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Households	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
Tribal	8,832	482	5.46%	192	251%		435.4	0.062			\$ 1,192

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 fifteen (15) 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: 12
 - Total Reach: 90,794
 - **Southern California American Indian Resource Center (SCAIR)**
 - Total Outreach Activities YTD: 41
 - Total Reach: 29,619

SUCCESSES & 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
Ewiiaapaayp 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

October 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	65	0%	1,119	6%	47.84	0.006	-0.179	\$182

Tribal Community Outreach Update



Outreach Activities

The activities are in accordance with D.21-06-015.

- SoCalGas maintains communication with Tribes serviced by SoCalGas.
 - 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.
 - Finalized contract with Tribal Consultant to help roll out outreach strategy and identifying non-federally recognized tribes, and scheduling meetings with Tribes.
 - Meetings regarding grants scheduled in November with four Tribes.
 - California Nations Indian Gaming Association will have a meeting in December locally and have provided an opportunity for SoCalGas to present and offer a longer presentation to the members at a location of their choosing.

Successes and Challenges

- **Success:** Offers for presentations have been made to Soboba, Santa Rosa, Pechanga and Morongo.
- **Success:** Continue 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 including Indigenous Peoples Day in the City of Los Angeles and the Pukúu Cultural Center.
- **Challenge:** SoCalGas provides service to 10 of the 21 tribes in service territory and only 16,689 residential meters of which 93% are on leased land – providing limited opportunities for program participation.

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
October 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]		47							5.7	5.7	\$ 280

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
December 8, 2022

Sacramento, CA
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 10/31/2022 [2]	\$42.31

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. \$9.8M is committed to off-set Nov-Dec 2022 collection. \$32.5M is committed for PY 2022 activities. Any unspent funds at the end of 2022 that were not allowed to carry forward to 2023 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 – Oct)	\$48.98
2022 Expenses from (Jan – Oct)	\$49.11
2022 Accrued Interest (Jan-Oct)	\$0.24
Total Unspent Funds through 10/31/2022	\$24.86

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 October 2022	+ \$8.15
Expenses incurred through YTD October 2022 [4]	- <u>\$12.00</u>
Total remaining unspent funds as of October 31, 2022 [5]	= \$8.23
Total remaining ESA CAM committed funds as of October 31, 2022 [2]	- <u>\$3.41</u>
Total remaining unspent & uncommitted funds as of October 31, 2022 [5]	= \$4.82
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]	\$81.79
Total Remaining Unspent Funds as of 10/31/2022 [1]	\$36.64

Footnotes

[1] Unspent Funds related to Revenues Collected

[2] Total Expenses from Annual and Monthly Reports - Tables 1 and 1A

[3] Total Expenses from October 2022's Monthly Report - Summary Table

Note: Unspent funds can only be used for ESA Program activities or returned to ratepayers

PSPS Ongoing Activities

Low Income Oversight Board Meeting
December 8, 2022

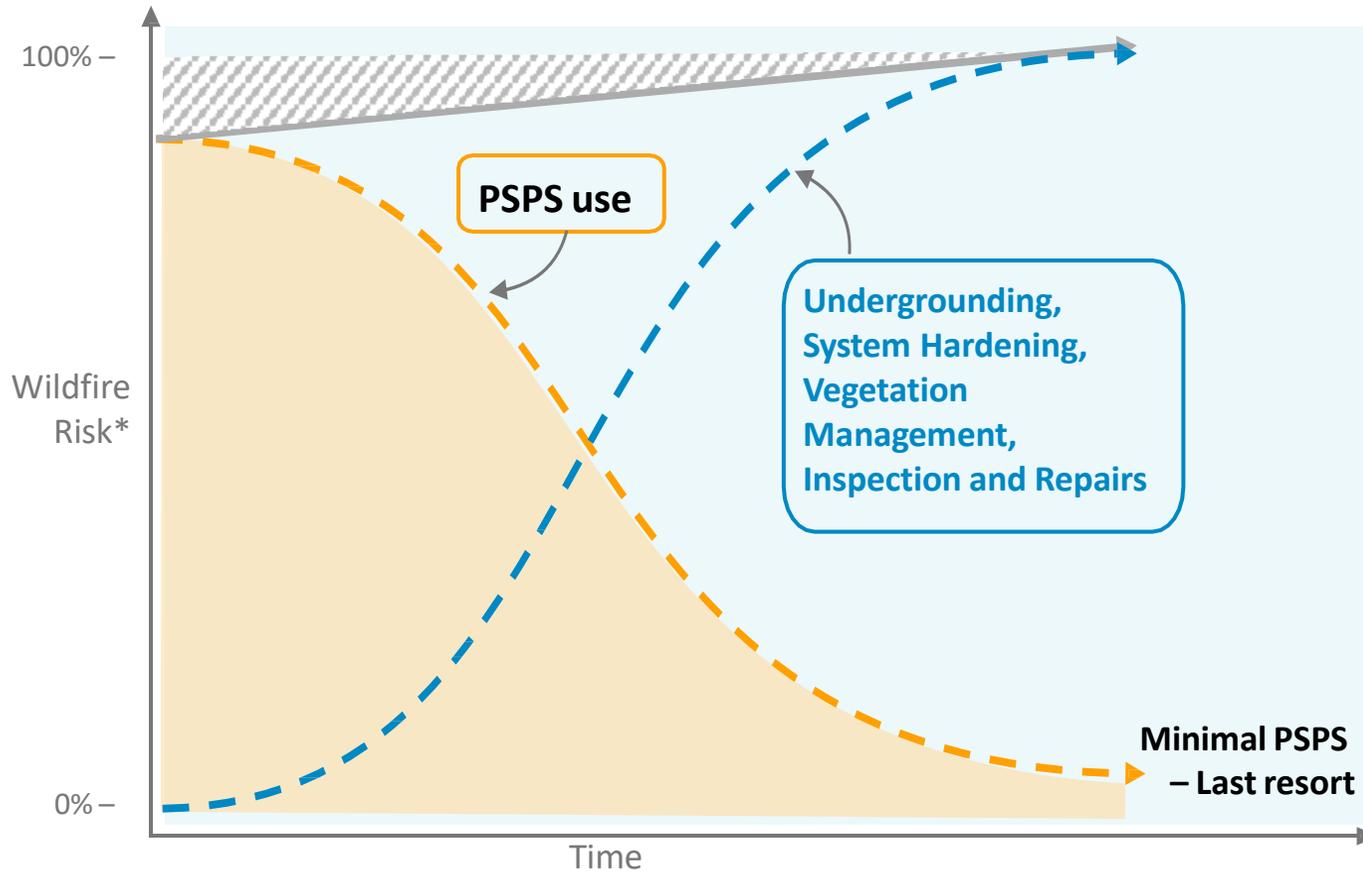
Sacramento, CA
WebEx





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.



Customer Resources and Support – Expanded in 2022

Backup Power Transfer Meter Program

Helps safely connect generator power to your home during emergency outages.

pge.com/transfermeter

Portable Battery Program*

Fully subsidized portable battery solutions.

pge.com/pspsresources

Generator and Battery Rebate Program*

Rebates to purchase a qualifying generator or battery.

pge.com/backupper

Partnership with 211

24/7 free, confidential support and resources via call or text to 211.

211.org

*For qualifying customers



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://www.pge.com/crc)
- **Food Resource Partnerships:** Helping customers access food replacement packages and delivering nutritious meals to seniors. [Pge.com/disabilityandaging](https://www.pge.com/disabilityandaging)
- **Portable Battery Program:** Supporting customers with fully subsidized portable battery solutions. [Pge.com/pspsresources](https://www.pge.com/pspsresources)
- **211 Partnership:** Delivering 24-7 free confidential support and resources via calls or texts. [211ca.org](https://www.211ca.org)
- **Kids Emergency Safety Site:** Educating kids in grades K-6 about emergency safety. [Kidsemergency.com](https://www.kidsemergency.com)
- **California Foundation for Independent Living Centers:** Providing qualifying customers with access to hotel stays, food stipends and more. [Cfilc.org](https://www.cfilc.org)
- **Generator and Battery Rebate Program:** Offering rebates for eligible customers to purchase a qualifying generator or battery. [Pge.com/backuppower](https://www.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://www.safetyactioncenter.pge.com)
- **Wildfire Safety:** Providing information and support for our wildfire prevention efforts. [Pge.com/wildfiresafety](https://www.pge.com/wildfiresafety)

2022 SCE PSPS OVERVIEW



January –
October

Statistics	Activations	Customer Interruptions	Circuit Interruptions	Customer Minutes of Interruption
2022 Fire Season	4	209	2	~208k

MITIGATING IMPACTS OF PSPS

Customer Care Programs

2022 COMMUNITY CARE RESOURCES

66 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

Enables 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 September 2022 to include additional customers. Since program inception, more than 9k batteries have been delivered through the program.
- **\$150 rebate** for portable batteries for customers in HFTDs to power devices and appliances.
- **\$200 rebate** for portable generators for customers in HFTDs
- **\$600 rebate** for portable generators for customers in HFTDs and enrolled in CARE/FERA or Medical Baseline Allowance.
- Statewide Self-Generation Incentive Program (SGIP)

2022 ACHIEVEMENTS

- *New CRC Enhancements, including "leave behind" device charging, privacy screens for medical device use or nursing, and backup manual wheelchair.
- *New Tribal Mini-Grant Program
- *Launch of **Access & Functional Needs (AFN) Self-Identification Pilot**
- *New partnerships with local food banks
- Dedicated **AFN Liaison** on the PSPS Incident Management Team
- Deployed **9,275** free portable backup batteries since program inception (CCBB)
- Provided **1,675** Portable Power Station Rebates
- Provided **883** 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.



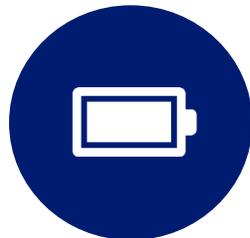
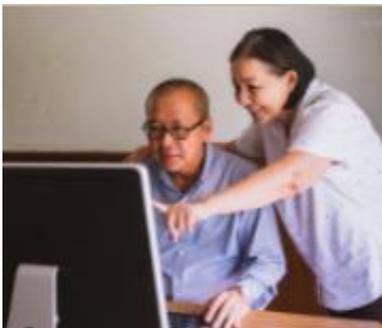
Accessibility

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



PSPS Stats



	2019	2020	2021	2022*
PSPS Events	4	5	1	0
Customers Impacted	33,291	79,761	5,858	0

**2022 Current year – results may change*

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
December 8, 2022

Sacramento, CA
WebEx

PG&E Disconnections Status and AMPs

Arrearage Management Plan (AMP)

- Number of customers enrolled: 176,060
 - Percentage of eligible households enrolled: 61%
 - Number successfully completed 12-month program launched in Feb. 2021: 10,947
- Total arrearages: \$275M
- Total amount forgiven: \$71M

*Data as of 9/30/2022

**Updated 11/17/2022

Disconnections

Number of disconnections, CY 2021 – September 30th 2022: 160*

Residential credit collection efforts resumed in July 2022

*Customers were inadvertently disconnected due to a process error. All customers received the required notifications per PG&E's tariffs and majority were reconnected within three hours. Process controls have been added to prevent future error.

*Data as of 9/30/2022

**Updated 11/17/2022

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

AMP eligible customer outreach (email and direct mail)

- Q3 2022 – 72K customers sent eligible outreach emails
- Q3&Q4 2022 – 80K customers to be sent eligible outreach postcards via direct mail



SCE Disconnections Status and AMPs

Arrearage Management Plan (AMP)*

- Number of customers enrolled: 20,597
 - Percentage of eligible households enrolled: 23%
 - Number successfully completed 12-month program launched in Feb. 2021: 1,730
- Total arrearages: \$30M
- Total amount forgiven: \$22M

*Updated 11/17/2022

Disconnections

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

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

*Updated 11/17/2022

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 begun another initiative to reach out to customers who are experiencing delayed billing and provide accommodations where needed.

AMP NEM outreach (outbound calls)

- 2022 (YTD)* – 355 calls completed



AMP Delayed Billing outreach

- 2022 (YTD)* - 2,893 letters mailed



*Updated 11/17/2022

SDG&E Disconnections Status and AMPs



Arrearage Management Plan (AMP)*

- Number of customers enrolled: 15,051
 - Percentage of eligible households enrolled: 36%
 - Number of customers successfully completed 12-month program: 3,237
- Total dollars actively enrolled in AMP: \$17.8M
- Total amount forgiven: \$12.2M

*As of 10/31/2022

AMP Marketing

Targeted Communications

- Included AMP messaging in CARE-eligible monthly bill comparison emails & direct mail
- Dedicated AMP email to 1800 CARE customers who were affected by the backlog

General Outreach

- Continued program education through SDG&E's Energy Solutions Partner Network, comprised of 200+ CBOs.

Disconnections

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

At this time, SDG&E has not resumed residential credit and collection activities and continues to evaluate when normal credit activities will begin.

*As of 11/30/2022

SoCalGas Disconnections Status and AMPs



Arrearage Management Plan (AMP)*

- Number of customers enrolled: 110,085
 - Percentage of eligible households enrolled: 29.5%
 - Number successfully completed 12-month program launched in Feb. 2021: 25,736
- Total arrearages: \$65.5M
- Total amount forgiven: \$19.9M

*Data as of 10/31/2022

Disconnections

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

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

*Updated 11/16/2022, no change from previous quarterly update

AMP Case Management

To support customer success in AMP, SoCalGas implemented a text and email pilot campaign in June to target customers with missed payments

AMP missed payment outreach

- Pilot campaign launched to test the effectiveness of digital communications
- Observed an overall increase of 11% in payments received
- The pilot campaign utilized a manual outreach approach, SoCalGas is exploring a more permanent solution since the outcome was successful
- Efforts are underway to implement a text, email, and direct mail notification process

*Updated 11/16/2022

Item 6: CSD Updates

2022 California Arrearage Payment Program
(CAPP) Update

Coordination Report on Low Income
Weatherization Program (LIWP)

Board Member Jason Wimbley, CSD

2022 CAPP Utility Arrearages & Allocations as of 11/17/2022

Investor Owned Utility Arrearages & Allocations (Includes CCA and DAS LSE Arrearages)

Utility Reporting	Priority 1 Arrears	Priority 2 Arrears	Total Arrears	% of Total Arrears (Rounded %0.0000)	Investor Owned Utilities and Community Choice Aggregators Allocation
Bear Valley Electric Service	139,841.82	12,144.72	151,986.54	0.02764%	151,986.54
Liberty Utilities	0.00	904,975.25	904,975.25	0.16456%	904,975.25
Pacific Gas and Electric Company	218,894,899.79	0.00	218,894,899.79	39.80339%	218,894,899.79
PacifiCorp	173,955.80	0.00	173,955.80	0.03163%	173,955.80
San Diego Gas and Electric Company	51,381,278.98	0.00	51,381,278.98	9.34306%	51,381,278.98
Southern California Edison Company	218,353,585.01	0.00	218,353,585.01	39.70496%	218,353,585.01
Southern California Gas Company	58,868,003.53	0.00	58,868,003.53	10.70443%	58,868,003.53
Southwest Gas	1,205,578.83	0.00	1,205,578.83	0.21922%	1,205,578.83
West Coast Gas	6,081.54	0.00	6,081.54	0.00111%	6,081.54
Alpine Natural Gas	-	-	-	0.00000%	-
Totals	549,023,225.30	917,119.97	549,940,345.27	100.00000%	549,940,345.27

Public Utility and Electric Cooperative Arrearages & Allocations

Utility Reporting	Priority 1 Arrears	Priority 2 Arrears	Total Arrears	% of Total Arrears (Rounded %0.0000)	Total Public and Electric Cooperative Allocation
Anza Electric Cooperative	45,999.58	16,419.01	62,418.59	0.06389%	62,418.59
Burbank Water and Power	637,838.06	0.00	637,838.06	0.65284%	637,838.06
City of Anaheim	1,742,488.68	0.00	1,742,488.68	1.78348%	1,742,488.68
City of Banning	214,561.16	0.00	214,561.16	0.21961%	214,561.16
City of Corona	22,205.28	0.00	22,205.28	0.02273%	22,205.28
City of Healdsburg Electric Department	98,276.24	0.00	98,276.24	0.10059%	98,276.24
City of Lompoc Electric Division	460,752.26	0.00	460,752.26	0.47159%	460,752.26
City of Long Beach	1,212,880.28	0.00	1,212,880.28	1.24141%	1,212,880.28
City of Needles	30,311.67	13,088.02	43,399.69	0.04442%	43,399.69
City of Palo Alto Utilities Department	140,540.73	0.00	140,540.73	0.14385%	140,540.73
City of Pittsburg	7,092.45	0.00	7,092.45	0.00726%	7,092.45
City of Ukiah	478,531.17	0.00	478,531.17	0.48979%	478,531.17
City of Vernon	1,315.88	0.00	1,315.88	0.00135%	1,315.88
Glendale Water and Power	1,528,053.21	0.00	1,528,053.21	1.56400%	1,528,053.21
Imperial Irrigation District	10,878.06	14,559.54	25,437.60	0.02604%	25,437.60

Utility Reporting	Priority 1 Arrears	Priority 2 Arrears	Total Arrears	% of Total Arrears (Rounded %0.0000)	Total Public and Electric Cooperative Allocation
Lodi Electric Utility	263,112.81	0.00	263,112.81	0.26930%	263,112.81
Los Angeles Department of Water and Power	76,495,695.74	82,610.57	76,578,306.31	78.37986%	76,578,306.31
Modesto Irrigation District	1,270,673.12	557,910.36	1,828,583.48	1.87160%	1,828,583.48
Moreno Valley Electric Utility	399,621.67	0.00	399,621.67	0.40902%	399,621.67
Pasadena Water and Power	1,717,380.66	0.00	1,717,380.66	1.75778%	1,717,380.66
Rancho Cucamonga Municipal Utility	8,564.49	0.00	8,564.49	0.00877%	8,564.49
Sacramento Municipal Utility District	9,402,316.33	539,858.19	9,942,174.52	10.17607%	9,942,174.52
San Francisco Public Utilities Commission	103,243.80	0.00	103,243.80	0.10567%	103,243.80
Turlock Irrigation District	184,726.47	0.00	184,726.47	0.18907%	184,726.47
Alameda Municipal Power	-	-	-	0.00000%	-
Azusa Light and Water	-	-	-	0.00000%	-
Biggs Municipal Utilities	-	-	-	0.00000%	-
City of Cerritos	-	-	-	0.00000%	-
City of Colton	-	-	-	0.00000%	-
City of Industry	-	-	-	0.00000%	-
City of Riverside	-	-	-	0.00000%	-
City of Shasta Lake	-	-	-	0.00000%	-
Colorado River Agency	-	-	-	0.00000%	-
Gridley Electric Utility	-	-	-	0.00000%	-
Kirkwood Meadows Public Utility District	-	-	-	0.00000%	-
Lassen Municipal Utility District	-	-	-	0.00000%	-
Lathrop Irrigation District	-	-	-	0.00000%	-
Merced Irrigation District	-	-	-	0.00000%	-
Plumas-Sierra Rural Electric Cooperative	-	-	-	0.00000%	-
Redding Electric Utility	-	-	-	0.00000%	-
Roseville Electric	-	-	-	0.00000%	-
Shelter Cove Resort Improvement District	-	-	-	0.00000%	-
Silicon Valley Power	-	-	-	0.00000%	-
Surprise Valley Electric Cooperative	-	-	-	0.00000%	-
Trinity Public Utility District	-	-	-	0.00000%	-
Truckee Donner Public Utility District	-	-	-	0.00000%	-
Valley Electric Association	-	-	-	0.00000%	-
Totals	96,477,059.80	1,224,445.69	97,701,505.49	100.00000%	97,701,505.49

Community Choice Aggregator Arrearages & Allocations (By Investor Owned Utility)

Investor Owned Utility (IOU) Name Community Choice Aggregator (CCA)	Total Arrears Reported to The Department	Percent of Total Arrearage Within Applicable IOU (Rounded to 0.0000%)	Total IOU Allocation	CCA Allocation Based on Percentage of Total Arrearage
Pacific Gas and Electric Company & CCA	218,894,899.79		218,894,899.79	
Central Coast Community Energy	1,505,602.81	0.68782%		1,505,602.81
CleanPowerSF	1,244,798.66	0.56867%		1,244,798.66
East Bay Community Energy	4,276,742.16	1.95379%		4,276,742.16
King City Community Power	30,969.45	0.01415%		30,969.45
Marin Clean Energy	4,363,184.84	1.99328%		4,363,184.84
Peninsula Clean Energy Authority	846,365.59	0.38665%		846,365.59
Pioneer Community Energy	1,096,071.04	0.50073%		1,096,071.04
Redwood Coast Energy Authority	977,599.14	0.44661%		977,599.14
San José Clean Energy	2,241,936.31	1.02421%		2,241,936.31
Silicon Valley Clean Energy Authority	767,779.76	0.35075%		767,779.76
Sonoma Clean Power	2,074,685.71	0.94780%		2,074,685.71
Valley Clean Energy Alliance	564,981.09	0.25811%		564,981.09
San Diego Gas and Electric Company & CCA	51,381,278.98		51,381,278.98	
Clean Energy Alliance	282,005.75	0.54885%		282,005.75
San Diego Community Power	1,610.02	0.00313%		1,610.02
Southern California Edison Company & CCA	218,353,585.01		218,353,585.01	
Apple Valley Choice Energy	721,426.96	0.33039%		721,426.96
Baldwin Park Resident Owned Utility District	304,471.58	0.13944%		304,471.58
Central Coast Community Energy	32,038.84	0.01467%		32,038.84
Clean Power Alliance	10,525,994.18	4.82062%		10,525,994.18
Desert Community Energy	476,423.11	0.21819%		476,423.11
Lancaster Choice Energy	2,226,212.06	1.01954%		2,226,212.06
Pico Rivera Innovative Municipal Energy	247,852.14	0.11351%		247,852.14
Pomona Choice Energy	932,695.36	0.42715%		932,695.36
Rancho Mirage Energy Authority	102,098.32	0.04676%		102,098.32
Santa Barbara Clean Energy	48,734.46	0.02232%		48,734.46
San Jacinto Power	557,488.84	0.25531%		557,488.84

Direct Access Service Load Serving Entity Arrearages and Allocations (By Investor Owned Utility)

Utility Name DAE LSE Name	Total Arrears Reported to The Department	Percent of Total Arrearage Within Applicable IOU (Rounded to 0.0000%)	Total IOU Allocation	DAE LSE Allocation Based on Percentage of Total Arrearage
Pacific Gas and Electric Company & CCA	218,894,899.79		218,894,899.79	
Just Energy Solutions	837.89	0.00040%		837.89
Pilot Power Group, Inc.	7,909.06	0.00360%		7,909.06
Direct Energy Business Marketing, LLC	-	0.00000%		-
Tiger, Inc.	-	0.00000%		-
San Diego Gas and Electric Company & CCA	51,381,278.98		51,381,278.98	
Pilot Power Group, Inc.	1,437.93	0.00280%		1,437.93
Three Phases Renewables LLC	-	0.00000%		-
Southern California Edison Company & CCA	218,353,585.00		218,353,585.00	
Pilot Power Group	2,787.07	0.00130%		2,787.07
Just Energy Solutions	-	0.00000%		-
Three Phases Renewables, Inc.	-	0.00000%		-

Senate Bill 1208 – Low-income utility customer assistance programs: concurrent application process

Alison LaBonte
Robert Sansone



California Public
Utilities Commission

Agenda

- Summary of SB 1208
- Principles for implementation of Section 3
- Upcoming activities
- Lifeline program background

Summary of SB 1208: Section 1

Legislative intent

- Improve all low-income utility customer assistance program application processes and maximize upfront data sharing in order to:
 - Reduce outreach and enrollment expenditures
 - Increase participation
- Maximize the use of technologies to facilitate the outreach and enrollment processes for low-income utility programs
- Coordinate enrollment process for those programs between agencies and public and private utilities
- Concurrent application process should complement, rather than replace, existing application processes

Summary of SB 1208: Section 2 (PUC § 731)

Concurrent application process for ESA, CARE, and FERA

- On or before June 30, 2024, the commission shall develop a "concurrent application process" that enables customers to concurrently apply, or begin to apply, to ESA, CARE, and FERA programs using data collected during the original application process
 - In coordination and consultation with the Department of Community Services and Development and other relevant state agencies
 - Notify, to the extent possible, eligible individuals that they have been successfully enrolled or are in the process of being enrolled into other programs
 - Complement, rather than replace, existing application processes
 - Utilities shall receive consent from its applicants before sharing data (i.e. using already-obtained application information to begin the enrollment process for other low-income programs)

Summary of SB 1208: Section 3 (PUC § 910.8)

LIOB report

- On or before June 30, 2023, the LIOB shall submit a report to the Legislature regarding:
 - The opportunity and process for expanding the third-party administrator contract used for the Universal Lifeline Telephone Service (ULTS) program, or establishing a similar new contract, to include water, gas, and electric utility programs to:
 - Facilitate enrollment between low-income assistance programs
 - Minimize privacy and data sharing concerns
 - Expedite eligibility verification processes
 - A recommendation for funding the expansion of the contract or establishment of a new contract

Principles for implementation – LIOB Report

- Resource constraints – LIOB and CPUC
- Limited time (June 30, 2023 report to legislature)
- LIOB Report (Section 3) is independent from implementation of concurrent application process for ESA, CARE, and FERA (Section 2) and has overlapping timelines

Upcoming activities

- **Jan 2023:** LIOB subcommittee planning and work plan development
- **Jan – May 2023:** Sub-committee meets and reaches consensus on recommendations
- **April – June 2023:** Draft report
- **June 30, 2023:** Report sent to legislature

Note, in parallel, ED will have several activities related to implementation of Section 2 of the bill (develop concurrent application process)

Primer on Energy and Communication bill discount programs

CARE / FERA programs

- $\leq 200\%$ / $> 200-250\%$ of FPL
- Investor Owned Utilities (IOUs) implement programs
- Funded through a public purpose charge to energy utility ratepayers
- Self-certification enrollment process
- LIOB est. in Statute in 2001 and oversees programs
- Customers geographically tied to their energy utility. Discount is fixed

LifeLine program

- $\leq 150\%$ of FPL / $\leq 135\%$ for federal benefits
- CPUC staff implements using a third party administrator
- Funded through Federal dollars and a surcharge on voice service from CA customers
- Eligibility verification upfront
- Universal Lifeline Telephone Service Trust Administrative Committee est. in Statute in 2001 and oversees program
- Customers may bundle telephone service with broadband. LifeLine benefit varies

LifeLine Program

- California LifeLine provides up to \$17.90 as a “reimbursing” subsidy to service providers for threshold services to qualifying Californians.
- Service providers must provide unlimited voice, text and 6 GB of data as a threshold to receive the full subsidy.
- California LifeLine customers sign up with a service provider who assists them in the application process. The service providers independently advertise and solicit customers for enrollment.
- There are currently 13 wireless resellers and 27 wireline providers.
- 1.2 million current Californian active customers.
- 85% are through wireless services.

Appendix

SB 1208 Full Text



California Public
Utilities Commission

SB 1208: Section 1

(a) It is the intent of the Legislature that this act do all of the following:

(1) Improve all low-income utility customer assistance program application processes and maximize upfront data sharing in order to reduce outreach and enrollment expenditures and increase participation by eligible individuals and families.

(2) Maximize the use of existing and future technologies in order to facilitate the outreach and enrollment processes for low-income utility customer assistance programs.

(3) Coordinate the enrollment process for those programs between agencies and public and private utilities.

(b) It is further the intent of the Legislature that the concurrent application process complement, rather than replace, existing application processes for each of those programs.

SB 1208: Section 2

(a) (1) On or before June 30, 2024, the commission, in coordination and consultation with the Department of Community Services and Development and other relevant state agencies that provide low-income electric or gas utility customer assistance programs, shall develop a process that, to the extent possible, enables customers to concurrently apply, or begin to apply, to multiple low-income customer assistance programs using data collected during the original application process, including, but not limited to, all of the following programs:

(A) The California Alternate Rates for Energy (CARE) program described in Section 739.1.

(B) The Family Electric Rate Assistance program described in Section 739.12.

(C) The Energy Savings Assistance program described in Section 2790.

(2) The process developed pursuant to paragraph (1) shall be known as the concurrent application process.

(b) The commission shall work with state agencies, electrical corporations, and gas corporations to notify, to the extent possible, eligible individuals that they have been successfully enrolled or are in the process of being enrolled into other programs.

(c) The concurrent application process shall complement, rather than replace, other application processes.

(d) Before sharing data, an electrical corporation or gas corporation shall receive consent from its low-income applicants to use already-obtained application information to begin the enrollment process for other low-income electric or gas utility customer assistance programs.

SB 1208: Section 3

(a) On or before June 30, 2023, the Low-Income Oversight Board established pursuant to Section 382.1 shall submit a report to the Legislature regarding the opportunity and process for expanding the third-party administrator contract used for the Universal Lifeline Telephone Service (ULTS) program, or establishing a similar new contract, to include water, gas, and electric utility service for purposes of facilitating enrollment between low-income assistance programs, minimizing privacy and data sharing concerns, and expediting eligibility verification processes. The report shall include a recommendation for funding the expansion of the contract or establishment of a new contract.

(b) Pursuant to Section 10231.5 of the Government Code, this section is repealed on January 1, 2027.

Low Income Oversight Board Energy Division Update

Presented by Kapil Kulkarni, Energy Division Staff
December 8, 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**

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

- **ESA Working Group**

- December 15, 2022 – discuss mid-cycle process
- January 26, 2023 – 2022 year end review (draft)
- 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*	November					December			January				February				
	11/7	11/14	11/21	11/28	12/5	12/12	12/19	12/26	1/2	1/9	1/16	1/23	1/30	2/6	2/13	2/20	2/27
ESA Plus/Deep Implementation Pilot (Joint SCE/SCG)**	Open to participation 11/9																
ESA Plus/Deep Evaluation Pilot (Joint SCE/SCG)**	Open to participation 11/9																
Building Electrification and Clean Energy Homes Pilot Evaluation	Program Ramp Up						Open to Participation (Tentative End Q4 2022)										
Interactive Energy Education Note: This timeline is preliminary and subject to change based on future program needs being identified.	TBD								Open to Participation (Tentative 1/1/23)								
Main ESA (Basic/Plus) Program (delivery of core single-family in-home services)	Contract Awards and Issuance/Program Launch								Program Ramp up								
Customer Experience Technology Platform and Customer Online Audit						Contract Negotiations						Contract Awards					
Main ESA (Basic/Plus) Program																	
Multifamily Whole Building Program						Contract Awards/ Issuance ⁽⁵⁾			AL Submission 1/13/23		ED Review of Advice Letter						
Statewide Multifamily Central Portal				System Launch 11/30													

Questions?

2022 Low Income Needs Assessment

Current Activity

- Final report released in December

Upcoming Activity

- 2025 LINA scope of work development in Q1/Q2 2023

Thank you!

Kapil Kulkarni, Energy Division

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213-620-6453

CHANGES Program Report

Consumer Help and Awareness of Natural Gas and Electricity Services

Ravinder Mangat, Senior Regulatory Analyst, Analytics Unit, Consumer Affairs Branch, News and Outreach Office

Low Income Oversight Board (LIOB) 4th Quarterly Meeting - December 8, 2022



California Public
Utilities Commission

Introduction

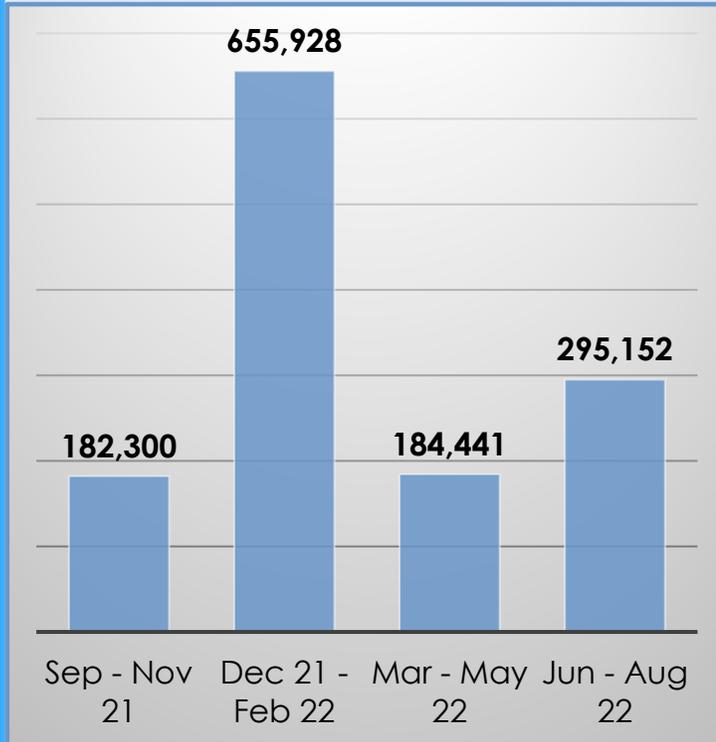
- CPUC created CHANGES to support Limited English Proficient (LEP), disabled, and senior consumers that have issues with their energy services.
- Three main components: outreach, education, and individual case assistance (needs assistance or dispute resolution).
- Contract oversight by the CPUC's Consumer Affairs Branch (CAB) Analytics Group in the News and Outreach Office.
- Lead contractor team consists of Self-Help for the Elderly and Milestone Consulting. Together they manage a collaborative of 26 Community Based Organizations(CBOs).
- CHANGES funding renewed in the CARE/ESA Decision 21-06-015 through 2026, and which ordered a continuation of independent evaluations of the program. The next study is due to be completed by February 2023.
- Updates are planned to database, to include an interface with tableau to allow more complex analysis to be undertaken.

CHANGES Services

September 2021 – August 2022

Outreach

Consumers reached through Community Events and Media Placements.

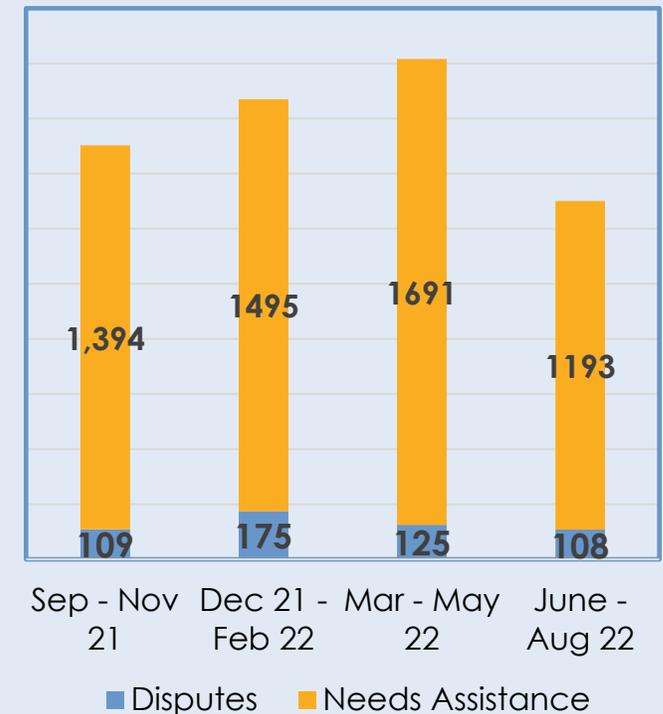


Consumer Education



Case Assistance

Dispute Resolution cases remain low due to low IOU disconnection rates.



Most Prevalent Case Assistance Services

1st Quarter of New Program Year June – August 2022

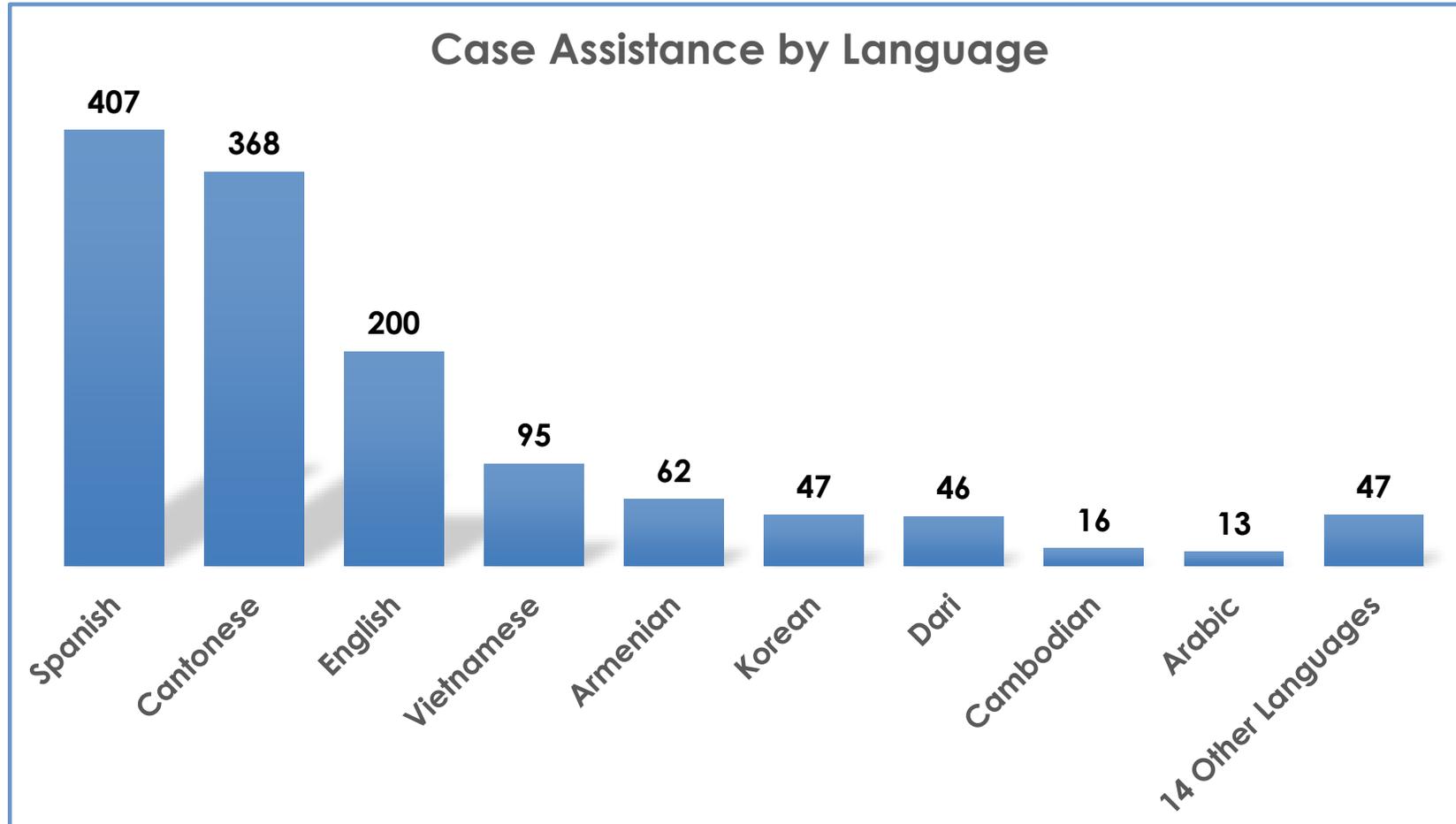
- LIHEAP - 790 cases (972 in previous quarter)
- CARE/FERA Enrollment/Recerts. – 156 cases (229 in previous quarter)
- Arrearage Management Plan (AMP) – 110 cases (179 in previous quarter)
- Set Up Online Account Access – 82 cases (59 in previous quarter)
- Total Services – 1,733 (2,222 in previous quarter)

The COVID-19 pandemic led to a pause in disconnections and reduced the number of high-pressure direct sales e.g., by gas aggregators. This has led to much lower demand for dispute resolution and increasingly high bill amounts have made the need for payment and bill reduction programs imperative.

- LIHEAP, CARE/FERA, AMP represented 61% of all services in this quarter

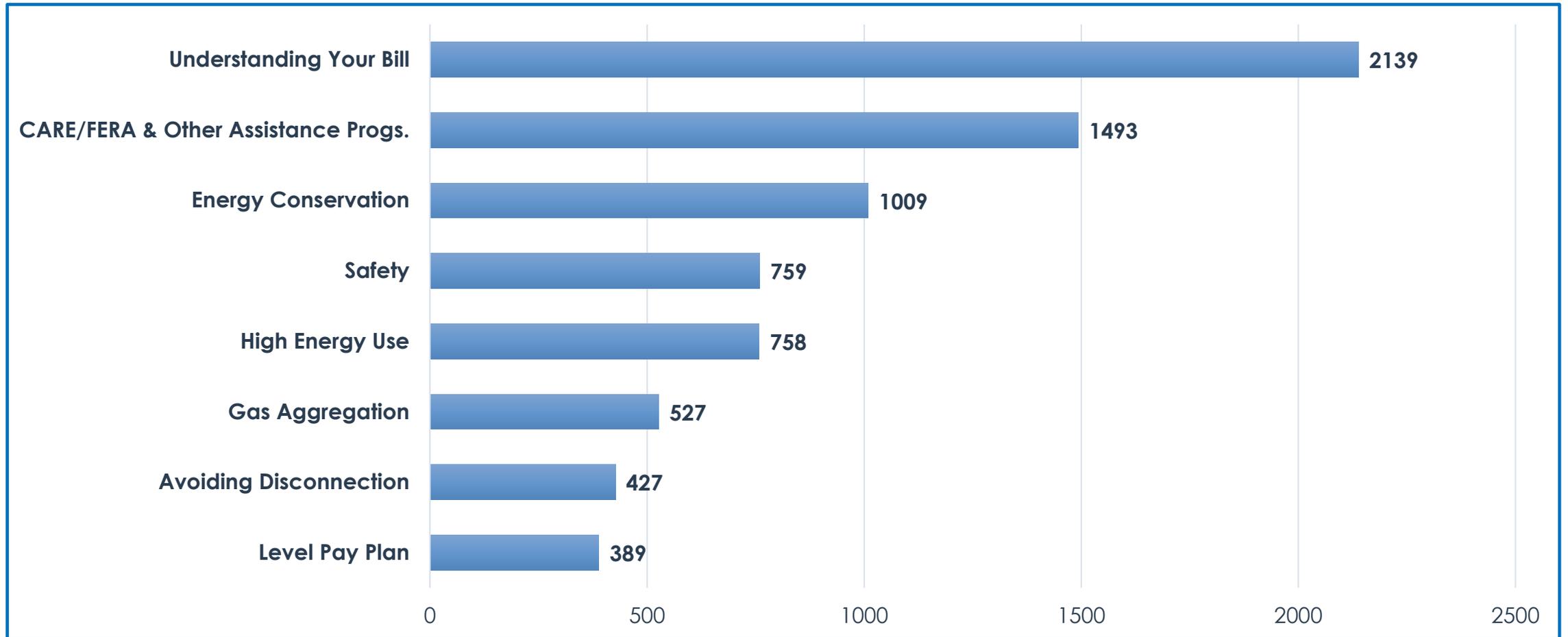
Case Assistance Services by Language

1st Quarter of New Program Year June – August 2022



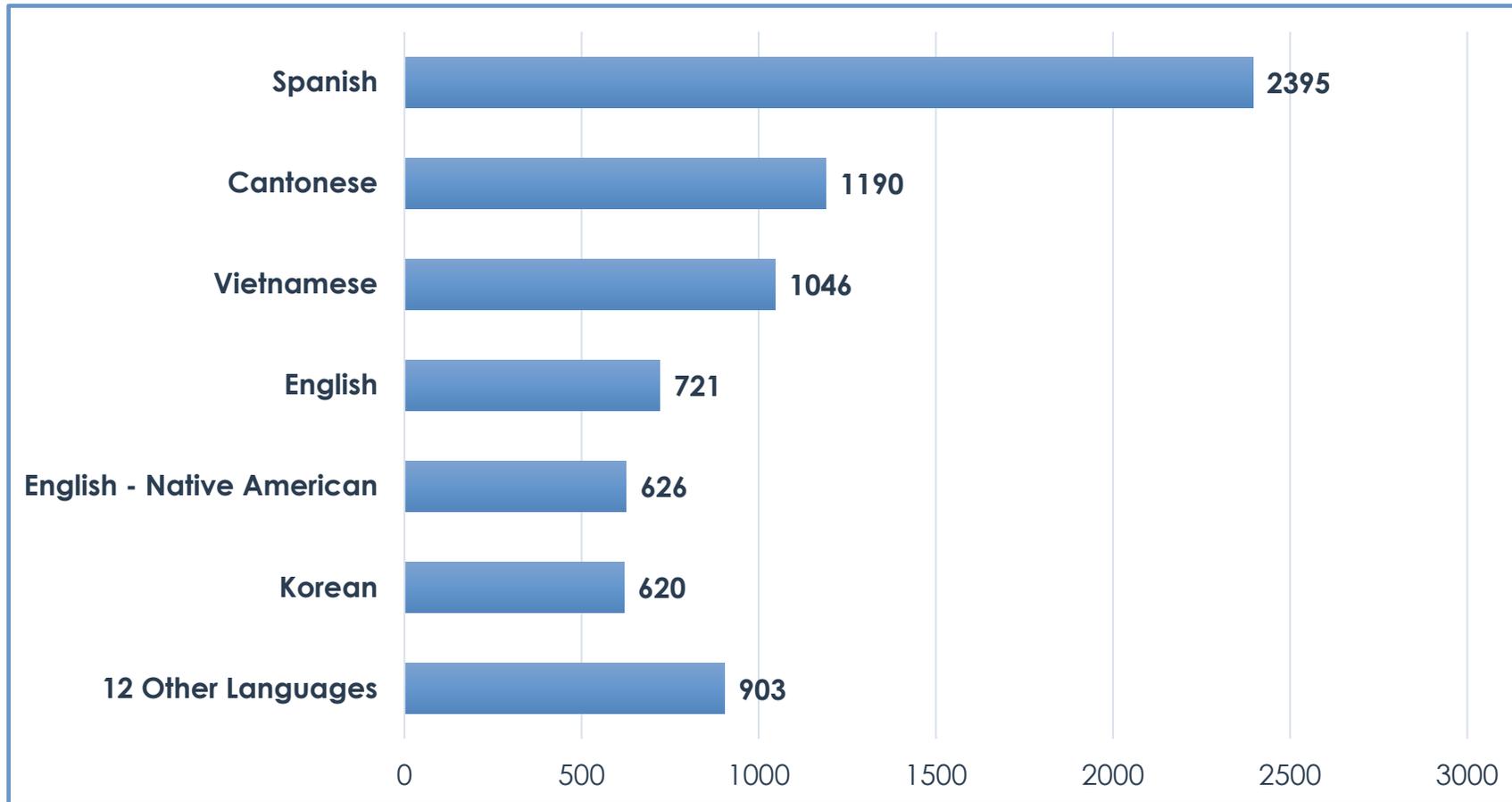
Consumer Education - Topic

1st Quarter of New Program Year June – August 2022



Consumer Education - Language

1st Quarter of New Program Year June – August 2022



OUTREACH Activities

1st Quarter of New Program Year June – August 2022

- Community Outreach Events - 21 events reaching nearly 60,000 consumers.
- Media Placements – 4 placements reaching just over 235,000 consumers.
- 40 Social Media Placements.
- Presentations to over 20 non-CHANGES CBOs.

Conclusion

- Compared to 2021, case assistance, education and event outreach are up significantly. Services are approaching pre-pandemic levels.
 - All the CBOs have now opened their offices to clients. More in-person services and community events are being held, and CBOs have become more adept at providing services remotely.
- As per the last two program years, case assistance services predominantly provided support for those needing help paying or lowering their bills. Support for LIHEAP, CARE/FERA, AMP applications and related support represented 61% of all case services in the last quarter.

Any questions?



California Public Utilities Commission

Ravinder Mangat, Senior Regulatory Analyst, Analytics Unit, Consumer Affairs Branch, News and Outreach
Office

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CPUC CBO Capacity Grant Program Discussion Draft

Stephanie Green
Chris Moore
Asia Powell
Hope Christman

LIOB, December, 2022



California Public
Utilities Commission

DISCUSSION DRAFT ONLY
Final plan subject to Commissioner approval.

Background: Current Barriers to CBO Outreach

- Many CBOs are under-resourced and under-staffed, forcing them to limit their engagement in governmental processes that can be very time consuming
- CBOs and the communities they serve lack technical capacity to access or engage with CPUC programs and policies
- CPUC unable to offer industry-standard stipends for CBO participation on workshop panels and advisory groups.
- I-Comp requirements too burdensome for one-off participation

DISCUSSION DRAFT ONLY

Final plan subject to Commissioner approval.

AB 179

In AB 179, the Budget Act of 2022, the California Legislature approved \$30,000,000 to be “used by the Public Utilities Commission for capacity grants to community-based organizations that conduct outreach and obtain technical assistance for participation in Public Utilities Commission decision making processes and supporting activities and that support ongoing equity initiatives and provide clean energy access opportunities to tribes, as defined pursuant to Section 21073 of the Public Resources Code, and other underrepresented communities.”

DISCUSSION DRAFT ONLY

Final plan subject to Commissioner approval.

Proposed Grant Programs

These grant programs are:

- Public Participation Grants
- Equity, Engagement, and Education Grants
- Clean Energy Access and Community Project Grants

Summary of Proposed Funding		
Category	Maximum Award	Total Available
Public Participation Grants	\$5,000	\$1,000,000
Equity, Engagement, and Education Grants	\$100,000	\$4,000,000
Clean Energy Access Initiatives and Community Project Grants	\$1,250,000	\$23,500,000
Administration	N/A	\$1,500,000
Total:		\$30,000,000

DISCUSSION DRAFT ONLY

Final plan subject to Commissioner approval.

Public Participation Grants

Total proposed funding: \$1,000,000

Per-grant proposed funding: \$250 to \$5,000

Application and funding cycle: Rolling

- Grants up to \$5,000 per activity for an eligible entity to participate in defined and discrete activities. e.g. speaking on a workshop panel, service on working group or participation in other decision-making processes.
- Provides prompt payment for these discrete engagements.
- Applications may be accepted and on a rolling basis. Total funding for the Public Participation Grants portion of this program will be \$1 million. Method of distribution of grants to be determined (example payments dispersed by completion of project activities identified in approved application).
- Annual program cap and cap per organization to ensure even distribution over time and fair distribution across many organizations.
- Awardees for these grants will not be eligible for I-Comp for the same activities.
- Similar to the I-Comp program, successful applicants will be expected to demonstrate that they will bring a unique contribution that is beneficial to ratepayers.

DISCUSSION DRAFT ONLY

Final plan subject to Commissioner approval.

Equity , Engagement and Education Grants:

Total proposed funding: \$4,000,000

Per-grant proposed funding: \$5,000 to \$100,000

Application and funding cycle: Awards in Summer of 2023 and Summer of 2024

- This program will provide grants up to \$100,000 for the purposes of building CBO, Tribal, and community capacity to understand and engage with CPUC decision-making processes.
- Activities in this category may include hiring consultants or technical experts, community engagement and outreach related to CPUC proceedings, education, training and curriculum development, and partnership and coalition development.
- Method of distribution of grants to be determined (example payments dispersed by completion of project milestones identified in approved application).

Clean Energy Access and Initiatives Grants:

Total proposed funding: \$23,500,000

Per-grant proposed funding: \$100,000 to \$1,250,000

Application and funding cycle: Awards in Summer of 2023 and Summer of 2024

- This program will provide grants up to \$1.25 million for the purpose of developing equity initiatives and clean energy access opportunities for eligible applicants
- Examples of potential projects include:
 - Projects that develop community led solutions to climate change mitigation, adaption, and resilience challenges that can be carried out in partnership with a utility
 - Projects that cooperatively develop distributed energy resource projects
 - Community needs assessments that can be used to inform CPUC decision-making and improved on the delivery of current programs; Community-led data collection and analysis
 - Programs that improve awareness, participation and enrollment in existing clean energy programs;
 - Projects that improve the affordability of utility services for the communities as well as provide local economic opportunities or technical project implementation; etc.
- Method of distribution of grants to be determined (example monthly disbursements or payments dispersed by completion of project milestones identified in approved application).

DISCUSSION DRAFT ONLY

Final plan subject to Commissioner approval.

Project Logistics:

Program Development:

- Initial design phase, program details to be determined based on stakeholder feedback, subject to approval by commissioners.
- Collaboration with internal industry divisions will be essential to developing the grant program.
- Feedback from external stakeholders will inform the design of the grant program, and the success of the program will depend on robust participation from CBOs.

Program Staffing:

- Staffing needs will be supported by a budget limited to 5% of the overall funds, not to exceed \$1.5 million. Funding could be used for the hiring of temporary staff and/or consultants to assist in the operations of the program and procuring the technical infrastructure to manage the project.

Performance:

- Performance reporting metrics for CBOs should include operational reporting (potentially including program activities, budget, invoice, etc.), and program metrics

Eligible Applicants :

Applicants eligible to apply for the CPUC's Equity Initiatives and Clean Energy Grant Program include:

- A California community-based organization holding a current tax-exempt status under Section 501(c)(3) of the Internal Revenue Code;
- A California Native American Tribe. For the purposes of this grant, this includes all Federally Recognized Tribes, and other California Native Americans, as defined by Public Resources Code Section 21073 “California Native American tribe” means a Native American tribe located in California that is on the contact list maintained by the Native American Heritage Commission for the purposes of Chapter 905 of the Statutes of 2004.
- Tribal entities organizations incorporated under tribal law and wholly owned by the tribe, Tribal Section 17 Corporations, Tribal utilities and authorities operated under tribal law. Other non-profit organizations.

Questions?



Thank you!



California Public Utilities Commission

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v