# Low Income Oversight Board

# SB1208 Subcommittee Meeting

March 10, 2023

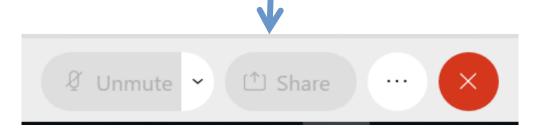
Webex Online Meeting

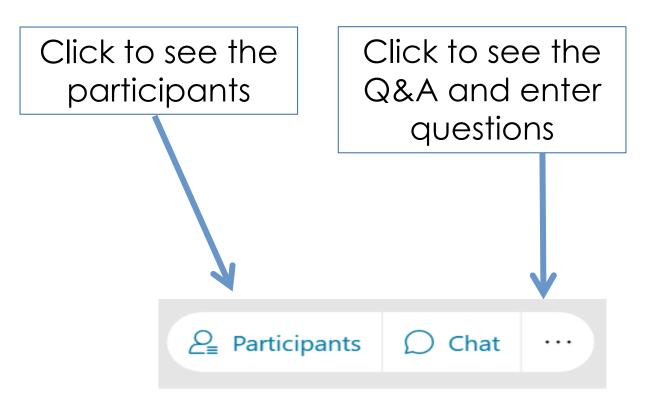




# Webex Participant Guide

All attendees will be automatically muted and have video disabled





This meeting is being recorded

California Public Utilities Commission 2

# Welcome & Introductions

# Low Income Oversight Board

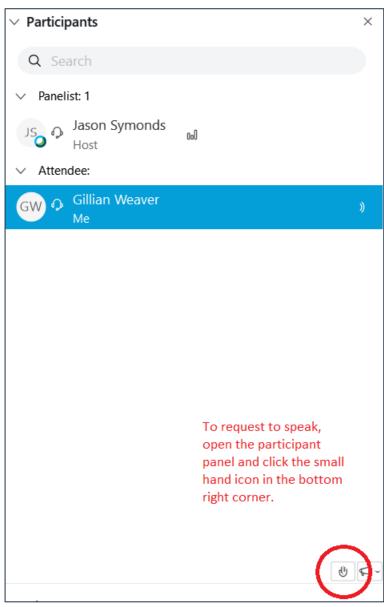
# SB1208 Subcommittee

- Benito Delgado-Olson Governor Representative
- Jason Wimbley CSD Representative
- Robert Castaneda Public Member
- Lourdes Medina Public Member
- John Tang Water Utility Representative

California Public Utilities Commission 145

# **Public Comment**

California Public Utilities Commission



# **Public Comment**

 English - Please use the "Raise Hand" feature in Webex window to request to speak

 Public comment is intended to provide an opportunity for members of the public who wish to address the board on a topic that is not on the agenda. 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

# **Presentations**





March 10, 2023

SB1208 LIOB Subcommittee Meeting



# **SDG&E Meeting Discussion Items**

- 1. Successful Joint Marketing and Outreach Strategies
- 2. Successful Joint Enrollment strategies
- 3. Data Sharing Effort with Outside Parties
- 4. Looking Forward



# Successful Joint Marketing and Outreach Strategies

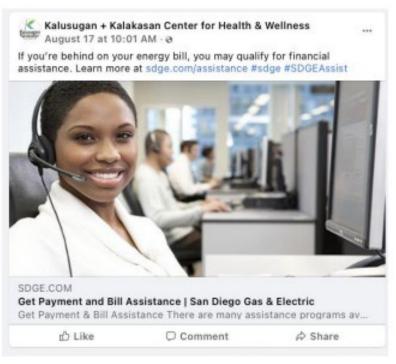
- ➤ Joint Marketing and Cross Promotional Strategies
  - Over 3,800 social media activities with partner network
  - Online page providing information on additional services, with direct links to additional programs and services
  - SDG&E Customer Assistance Program flyer in multiple languages used for outreach event and as part of ESA Program In-Home Energy Education
- ➤ Joint Outreach Strategies
  - Over 500 Events with CBO's and other community partners
    - Community events
    - Food Distributions
    - Cultural Fairs and Celebrations
    - SDG&E's Outreach and Tribal Relations teams work together to effectively engage and communicate with the 17 Federally recognized tribes SDG&E serves
    - Over 150 presentations
      - Various CBO staff meetings
      - CBO constituent gatherings
      - Other community partner gatherings



# **SDG&E Partner Cross Promotional Activities**

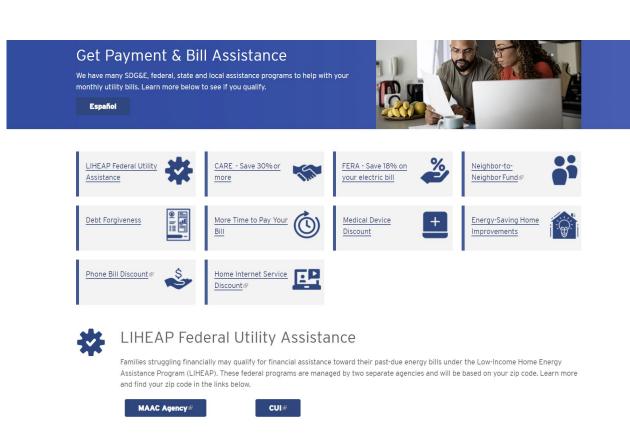


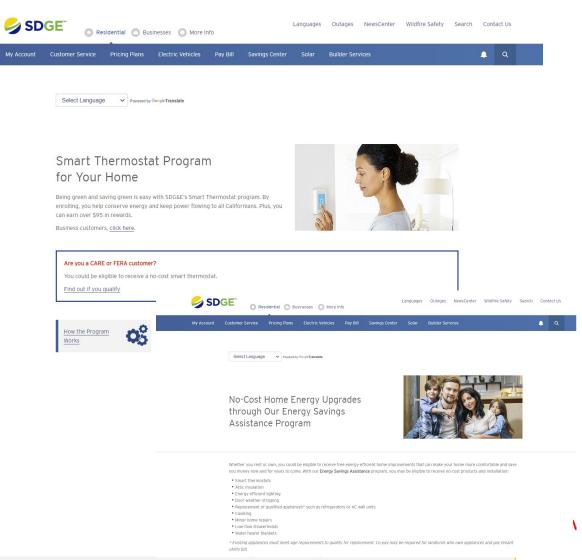






# **Cross Promotional Strategies Online**







# **Cross Promotional ME&O Program Materials**



CUSTOMER ASSISTANCE



Pay Online with My Account – it's convenient, easy and secure. My Account gives you the power to manage and monitor your energy cost and use. You can also schedule service requests and moving services, make payment arrangements, sign up for Energy Alerts, view outages, and receive alerts mid-cycle with your current and projected costs. Save time when you pay online with Auto Pay or on our mobile app with Text to Pay. Visit sdge.com/MyAccount to enroll.

### **Payment Arrangements**

Need more time to pay your bill? We can help. Extend your bill's due date to give yourself more time to pay or split your bills over time with a down payment and monthly installments. For more information, visit sdge.com/MyAccount.

#### evel Pay Plan

If you'd like to have more predictable energy bills each month, our Level Pay Plan (LPP) is free and can help. LPP will average your annual energy use and costs during a 12-month period. You pay an average bill amount each month instead of actual charges. To apply, visit sdge.com/MyAccount.

#### Third-party Notification

You can designate a friend, relative or community agency to receive a copy of your late payment notices from us. This "third party" can remind you that your payment is late and offer advice or assistance. To enroll, visit sde.com/thirdparty.

#### Vision Impairment

If you or someone you know is vision impaired, information from your SDG&E bill is available in braille. To make a request, call us at **1-800-411-7343**.

#### **Automated Notification of Outages**

If extreme heat poses a health risk for anyone in your home and your living space must be kept at a constant temperature, sign up for advance notification phone calls about state-directed rotating outages. To learn more, visit sde\_com/tempsensitive.

#### SAVE ENERGY

### Free services and appliances for your home

If you qualify for the Energy Savings Assistance Program\*\* we'll provide free energy-saving home improvements to your apartment,

CUSTOMER ASSISTANCE

Please note that renters need written permission from landlords to receive these services. Call 1-866-597-0597 or visit sdge.com/esa to apply.

## Cash Back on Energy-Saving Products and Projects

To help you save energy and money, we offer cash back for qualifying purchases and upgrades you make to your home. To see available rebates, visit **sdge.com/rebates**.

### My Energy Survey

To learn how your home uses energy, take our free My Energy Survey. You'll receive a customized report that shows where your energy dollars are going and an action plan with tips and ideas based on your answers to the survey. Visit sde.com/survey.

#### CONTACT INFORMATION

For more information on our programs and services, including income qualifications and referrals to community agencies, contact us at 1-800-411-7343. TDD/TTY call 1-877-889-7343 or voice (emergencies): 1-800-611-7343. You can also visit our website at sdge.com/assistance.



Help is just a click or phone call away.



Online sdge.com/assistance



## Support available when you need it

Whether you're interested in financial assistance, flexible payment options or ways to save energy, we can help.

#### SAVE MONEY

#### Save 30% or more on your monthly bill

With the California Alternate Rates for Energy (CARE)\* program you can save on your energy bill every month. Eligibility can be based on participation in certain public assistance programs or current household income and the number of people living in your home. To apply, visit sde.com/care.

#### Lower Electric Rates

If you do not qualify for CARE, you may be eligible for the Family Electric Rate Assistance (FERA) program. FERA provides income-qualified households of three or more with a reduced electric rate that can save 18% every month on your bill. To apply, visit sdee.com/fera.

#### **Medical Devices**

The Medical Baseline Allowance Program offers more energy at the lowest price to customers who rely on certain medical devices for their well-being. This program is not income based. For a full list of qualifying devices or to apply, please call 1-866-463-0070 or visit sdge.com/medical.

### **Debt Forgiveness**

Qualified residential CARE or FERA customers may be eligible for financial assistance to help reduce outstanding account balances through SDG&E's Arrearage Management Payment (AMP) Plan. For details, visit **sdge.com/AMP**.

#### Help Paying Your Bill

If you meet established income guidelines, you may qualify for emergency bill payment assistance and home repair services through the Low-income Home Energy Assistance Program (LIHEAP). Call 2-1-1 to learn more. San Diego customers can also visit 21/sand/ego.org or if you're in Orange County, 21/loc.org for more information.

#### Neighbor-to-Neighbor

A one-time assistance payment toward your SDG&E bill may be available from the Neighbor-to-Neighbor program. If you're facing an interruption of service and don't qualify for government assistance, call **2-1-1** to see if you qualify.

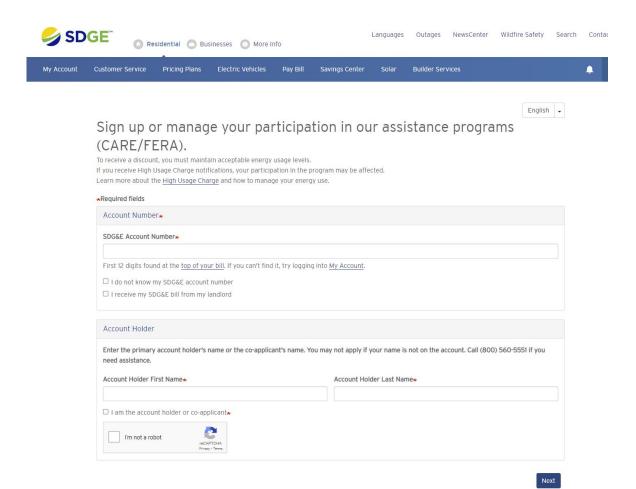


# Joint Program Enrollment Strategies

- ➤ Online CARE/FERA application
  - Enrolls customers in the appropriate program (CARE or FERA)
  - Provides leads for the ESA Program
- ➤ Customers participating in the ESA Program are provided information on CARE/FERA and can sign on the ESA Program form to request automatic enrollment into CARE or FERA
- Partnership with San Diego 211
  - Serve as a CARE/FERA capitation contractor and provide customers with ESA Program information
- SDG&E has partnered with LIHEAP agency
  - Held multiple events at SDGE branch offices and LIHEAP provider offices to support enrollment in LIHEAP and provide customer program enrollment facts for CARE, FERA and ESA
- SDG&E partners with San Diego County Water Authority to leverage enrollments for customer receiving water and energy saving measures
  - SDG&E receives rebates from SDCWA for customers enrollment in overlapping areas



# **Joint Enrollment Strategies**





# Data sharing endeavors with outside parties/entities\_

- CARE/FERA customer data is shared with Cal-American Water and SoCalGas
- Reviewing monthly list of customers receiving LIHEAP payments to target customers not enrolled in CARE or FERA
- > DAC/SASH Data Sharing Efforts
  - Annual data sharing of ESA Program participants
  - Bi-Annual sharing of DAC-SASH participants for ESA Program targeting and CARE/FERA enrollment



# **Looking Ahead**

- ➤ Continue with leveraging efforts that support providing customers with information on all programs and services
  - Online strategies for cross promotional activities
  - Partnerships with community-based organizations, tribal relations and contractors
- Continue to utilized joint enrollment strategies to streamline customer participation in SDG&E programs.
  - Joint program applications, lead generation, partner networks
- Continue with data sharing opportunities to leverage program enrollments and support new efforts
  - Clean Energy, LIHEAP, joint utility and water authorities
  - Support the implementation of SB1208



Informing and enabling cross program participation for PG&E customers in CARE/FERA, ESA, and non-PG&E assistance programs

Low Income Oversight Board SB 1208 Subcommittee Meeting March 10, 2023





# Agenda

- Marketing, Education and Outreach Approach
- Approaches to Facilitate Cross Program Participation
  - Example 1: Energy Savings Assistance Program (ESA)
  - Example 2: Rate Discount Programs (CARE/FERA)
- Data-sharing Considerations
- Questions/Comments

# Successful mixed marketing and outreach campaigns

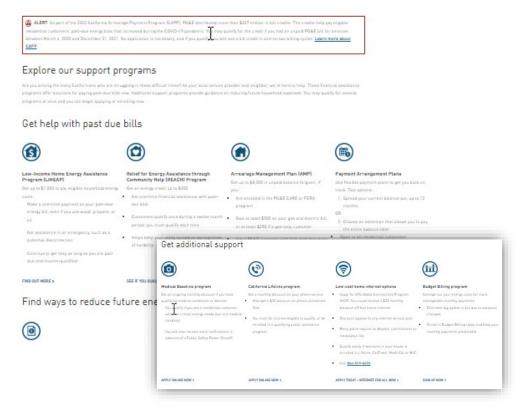
to inform customers of CARE, FERA, ESA, and non-PG&E assistance programs





# ME&O: One-stop Information Shop (online)





# www.pge.com/billhelp (pictured)

 Aggregating program information and making it easy for customers to find programs including

For Past Due Bills: CAPP, LIHEAP, AMP and REACH

For Reducing Future Bills: CARE/FERA, ESA

For Additional Support: Medical Baseline, California

Lifeline, Low-cost home internet

- Cross-promotion of this link and these resources in news releases, social media, and other customer support campaigns
- Plus, email and direct mail campaigns include LIHEAP and the Arrearage Management Plan (AMP), and leverage communications related to the CAPP distribution to cross-promote



# ME&O: One-stop Information Shop (on paper)

### Solutions for saving money and managing energy bills

Programs, tips and tools for your home









## Reduce monthly bills with CARE or FERA

CARE and FERA programs offer incomequalified households a significant monthly discount on energy bills. Find out if you are eligible for CARE or FERA at pge.com/carefera.

#### Energy Savings Assistance Program

If you live in a house, apartment, or mobile home that is five years or older, you could receive free improvements to make your home more energy efficient, safe and comfortable. Both renters and owners are eligible. Find out if you're income-qualified at pge.com/esa.

### Medical Baseline program

If someone in your home depends on tile-support or other equipment due to medical needs, you may be eligible for additional energy at the lowest price through the Medical Baseline program You will also receive extra notification in advance of a Public Safety Power Shutoff. Find more information at pge\_com/medicalbaseline.



### Pick the rate plan that is right for you

PG&E offers multiple rate plan options, and you can pick which one works best for your household. There are three main types of residential rate plans:



Time-of-Use Rate Plans:
When you use energy is as important as how much you use.

Electric Vehicle (EV) Rate Plans: For homes that also charge an EV or battery.

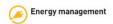
Learn more about residential rate plans at pge.com/rates.

### How to choose your rate plan

PG&E offers a personalized rate plan comparison based on your past energy use. Log in to your account online to view your comparison at pge.com/ratechoices.

Low-Income Home Energy

Assistance



#### Manage your cooling and heating costs

In the summer, set your air conditioner to 78 degrees Fahrenheit or higher. Visit one of our community cooling centers when temperatures are unusuality high. In the winter, set your heater to 88 degrees Fahrenheit or lower during the day and 55 degrees Fahrenheit at hight.

#### Unplug unused electronics

Turn off and unplug computers, TVs, phone chargers, entertainment consoles, coffee makers and other devices.

#### Wash full loads of laundry using cold water

Today's detergents work well in cold water, saving about 90% of the energy your washing machine would use to heat water.

#### Replace inefficient light bulbs

Use light-emitting diode (LED) bulbs they use 75% less energy, last six times longer, and create a warm, inviting feeling in your home.

For more energy savings tips, visi pge.com/everydaytips.

## **Universal Brochure**

- Provides comprehensive information about bill discount and assistance programs, rate plan choices, energy management, and payment support programs
- Available in multiple languages, including Braille

# Other Outreach in Support of non-PG&E Programs

- Co-branded postcards to promote non-PG&E programs such as LIHEAP
- Cross-promote LIHEAP to CARE customers via message on energy bill.



Difficulty paying your energy bill? Help is available.

Apply now for up to \$800 in assistance



Find out how to get help at sjchsa.org/Assistance





# ME&O: One-stop Information Shop (in person)

# ... and communicated through partners and CRSs

## **ESA Contractors**

- Provide collateral leave behinds that present solutions for saving money and managing energy costs
- Provide helpful information on complimentary programs: Demand Response (SmartAC), Wildfire Safety (PSPS) etc..
- Discuss new opportunities for bill savings (Arrearage Management Plan), and referrals to LIHEAP administrators for qualified households

## **CBOs**

- 14 new CBO contracts (18-24 months, totaling \$1.9m) to assist hard-to-reach households & disadvantaged communities (DAC) on the availability of various assistance and bill discount programs
- Reached ~ 750,000
   customers with information on
   CARE, FERA, ESA, AMP, SmartAC,
   Power Saver Rewards, Medical
   Baseline and other
   complimentary offerings

## PG&E

- Customer Service Representatives
  - - Inbound
  - Outbound case management calls to customers with past due amounts (96% reached, > 600 enrolled in CARE/FERA; of those referred to LIHEAP pledged \$705,175)
- Other: CARE Welcome Kit, bill inserts, collateral leave behinds

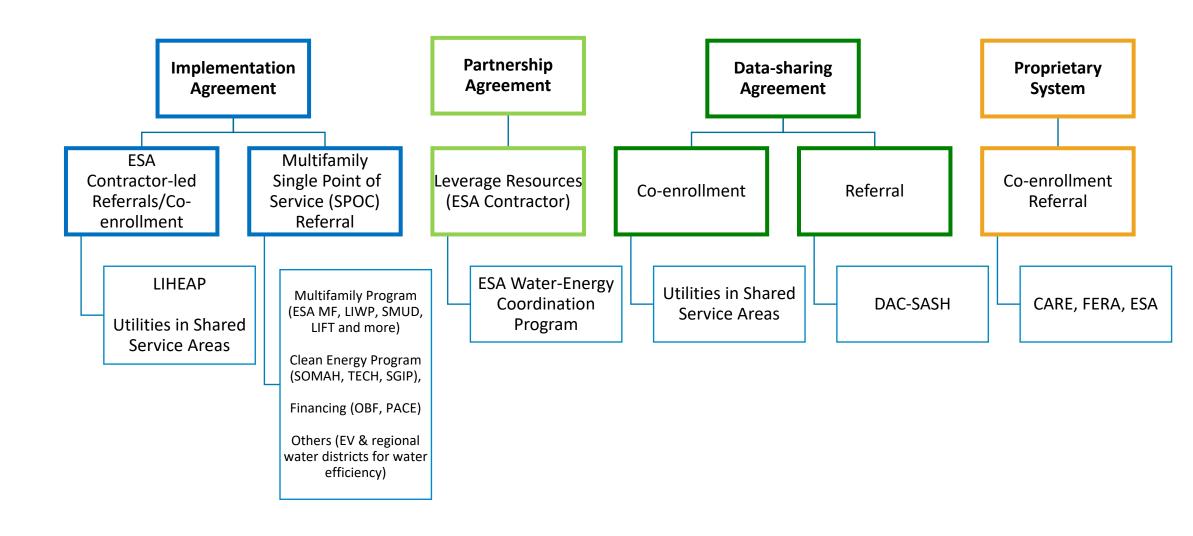
# Joint enrollment and data-sharing strategies

to streamline or facilitate PG&E customer co-enrollment in CARE/FERA, ESA, and non-PG&E assistance programs



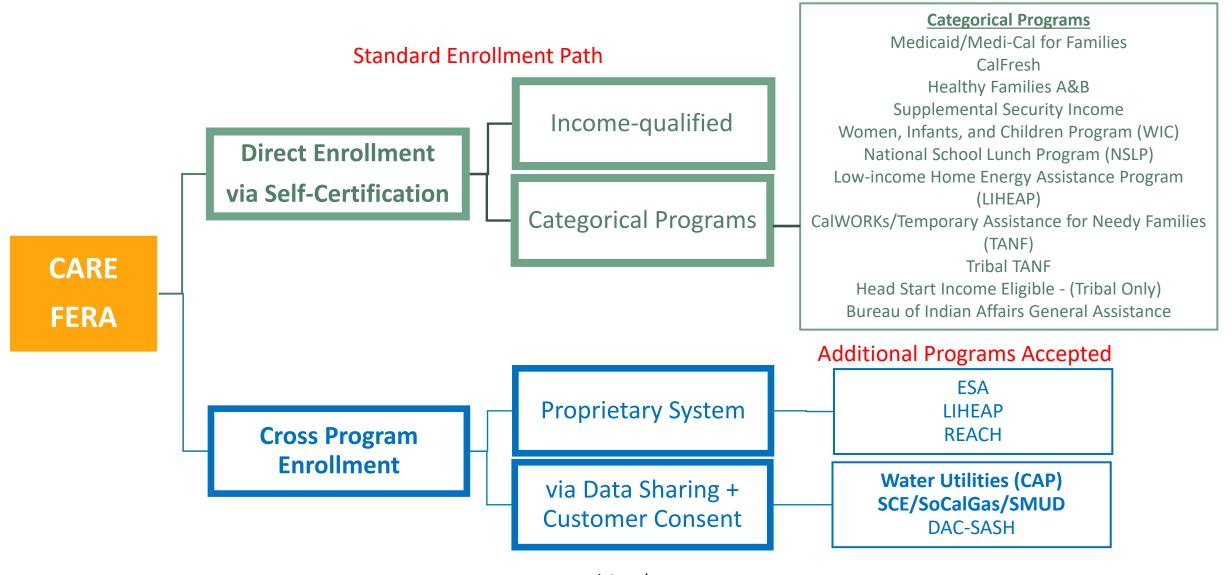


# **Cross Program Participation: ESA**





# **Cross Program Participation: CARE/FERA**



Internal



# **Data-sharing Considerations**

# Leveraging customer information encompasses different approaches and levels of disclosure

- Making different programs accessible to shared customers can be accomplished in a variety of ways
- Balance ease of participation with customer choice/privacy

# Seamless co-enrollment process appears to be more attainable when

- Program partners share similar purpose with comparable eligibility criteria supported by appropriate customer consent and non-disclosure agreement
- ... can be further enhanced, if have similar data security requirements/approach
- Laying the groundwork to enhance customer experience/participation across multiple incomequalified programs

Example: Updating CARE/FERA application to include updated customer consent language to facilitate continued enrollment in and qualification in a wider range of public and utility assistance program

# **Comments / Questions**

Jenny Wu (jenny.wu@pge.com)

Regulatory Policy Analyst

CARE/FERA/ESA Programs

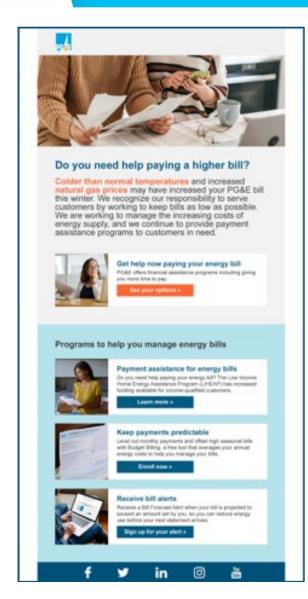


# **Supplemental Information**





# Winter Energy Bills – Support Program Email





Audience: ~3.9M residential customers

Test: 50/50 random split

## **Subject Lines:**

Original send, Jan 31st: Get help now paying your energy bill Did not open (DNO), Feb 6th: Need help paying a higher bill?



Choose a way to pay and get potential savings on your PG&E bill

We offer several ways to help you pay and save on your energy bill CHECK OUT OUR 1-MINUTE VIDEO > Extend your due date-make a payment arrangement. PG&E offers many financial assistance programs, we can find solutions VISIT PAYMENT ARRANGEMENT > VISIT ASSISTANCE PROGRAMS > (a) Avoid big swings in your monthly payments by signing up for Budget Billing. The plan bases you monthly payment amount on a 12-month average of your yearly energy costs. You can get an idea of

Internal



# Universal Brochure (ADA English Version, Page 1)

# Solutions for saving money and managing energy bills

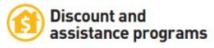
Programs, tips and tools for your home











# Reduce monthly bills with CARE or FERA

CARE and FERA programs offer incomequalified households a significant monthly discount on energy bills. Find out if you are eligible for CARE or FERA at pge.com/carefera.

### Energy Savings Assistance Program

If you live in a house, apartment, or mobile home that is five years or older, you could receive free improvements to make your home more energy efficient, safe and comfortable. Both renters and owners are eligible. Find out if you're income-qualified at pge.com/esa.

### Medical Baseline program

If someone in your home depends on life-support or other equipment due to medical needs, you may be eligible for additional energy at the lowest price through the Medical Baseline program. You will also receive extra notifications in advance of a Public Safety Power Shutoff. Find more information at pge.com/medicalbaseline.



## Rate plan choices

# Pick the rate plan that is right for you

PG&E offers multiple rate plan options, and you can pick which one works best for your household. There are three main types of residential rate plans:



### Tiered Rate Plan:

Bills are based on how much energy you use during each billing month.



### Time-of-Use Rate Plans:

When you use energy is as important as how much you use.



Plans: For homes that also charge an EV or battery.

Learn more about residential rate plans at pge.com/rates.

## How to choose your rate plan

PG&E offers a personalized rate plan comparison based on your past energy use. Log in to your account online to view your comparison at pge.com/ratechoices.



## **Energy management**

### Manage your cooling and heating costs

In the summer, set your air conditioner to 78 degrees Fahrenheit or higher. Visit one of our community cooling centers when temperatures are unusually high. In the winter, set your heater to 68 degrees Fahrenheit or lower during the day and 55 degrees Fahrenheit at night.

### Unplug unused electronics

Turn off and unplug computers, TVs, phone chargers, entertainment consoles, coffee makers and other devices.

# Wash full loads of laundry using cold water

Today's detergents work well in cold water, saving about 90% of the energy your washing machine would use to heat water.

### Replace inefficient light bulbs

Use light-emitting diode (LED) bulbs they use 75% less energy, last six times longer, and create a warm, inviting feeling in your home.

For more energy savings tips, visit pge.com/everydaytips.



# Universal Brochure (ADA English Version, Page 2)

## We are here to help

Pacific Gas and Electric Company (PG&E) provides income-qualified assistance programs for customers who need it the most, because we know that sometimes our customers need energy bill quidance.

Programs such as CARE, FERA and the Energy Savings Assistance Program are just a few of the ways we can help our customers save.

For more information about PG&E's assistance programs, visit pge.com/financialassistance. For the CARE/FERA program call 1-866-743-2273.

## Let us speak your language

PG&E wants to make sure we are contacting you in your preferred language. Things like bills, critical safety communications, and other messages when available will be delivered in the language of vour choice.

If you'd like to update your contact information or change your language preference,\* log in to your online account at pge.com or call PG&E so that a customer service representative can help you.

\*Your preferred language may not be available.

### Save 20% or more with CARE

Reduce your monthly gas and electric bills by enrolling in the California Alternate Rates for Energy (CARE) program.

Income-qualified customers receive a monthly discount of 20% or more on their gas and electric rates. Check your income level below to see if you qualify.

Apply at pge.com/CARE or text "Enroll" to 20283. You can also call 1-866-743-2273.

### Save 18% with FERA

Get help with your monthly electric bill by enrolling in the Family Electric Rate Assistance (FERA) program. which offers a monthly discount for larger households.

Eliaible households with three or more people receive a monthly discount of 18% on their electric rates. Check your household size and income level below to see if you qualify.

Apply at pge.com/FERA or text "Enroll" to 20283. You can also call 1-800-743-5000

ANNUAL HOUSEHOLD INCOME*			
Number of persons in household	CARE	FERA	Energy Savings Assistance Program**
1	\$36,620 or less	Not eligible	\$33,975 or less
2	\$36,620 or less	Not eligible	\$45,775 or less
3	\$46,060 or less	\$46,061-\$57,575	\$57,575 or less
4	\$55,500 or less	\$55,501-\$69,375	\$69,375 or less
5	\$64,940 or less	\$64,941-\$81,175	\$81,175 or less
6	\$74,380 or less	\$74,381-\$92,975	\$92,975 or less
7	\$83,820 or less	\$83,821-\$104,775	\$104,775 or less
8	\$93,260 or less	\$93,261-\$116,575	\$116,575 or less
Each additional person, add	\$9,440	\$9,440-\$11,800	\$11,800

<sup>\*</sup>Before taxes based on current income sources. Valid through May 31, 2023.

### **Energy Savings Assistance Program**

CARE and FERA participants living in a house, mobile home or apartment that is at least five years old automatically qualify for free home upgrades.

Learn more at pge.com/esa.

## Payment support

### Receive a one-time energy credit pge.com/reach

You may be qualified to receive up to a \$300 energy credit through Relief for Energy Assistance through Community Help (REACH)

### Balance your monthly bill pge.com/budgetbilling

With Budget Billing, your monthly bill will be averaged out to allow you to budget your energy costs and eliminate big payment swings.

## Arrange more time to pay pge.com/paymentarrangement

If you cannot pay your bill on time or in full, you can set up a Payment Arrangement to extend your due date.

## Send past-due reminders to a friend or relative

### pge.com/thirdpartynotification

Get help finding a solution to past-due payment notices by adding a friend or relative to receive duplicate notices.

<sup>\*\*</sup>Effective July 1, 2022.

<sup>&</sup>quot;PG&E" refers to Pacific Gas and Electric Company, a subsidiary of PG&E. Corporation. @2022 Pacific Gas and Electric Company. All rights reserved. The Energy Savings Assistance Program from Pacific Gas and Electric Company is available to selected, income-qualified customers. These offerings are funded by California utility customers and administered by Offerings are funded by California Public Utilities Commission.
CIG-0522-4578W

# SB1208 Report Discussion and Development

# **Next Steps & Closing Remarks**

California Public Utilities Commission 34