



# Low Income Energy Oversight Board (LIOB) Subcommittee Request - Joint IOU Responses

Low Income Oversight Board Subcommittee Meeting  
WebEx

March 16, 2023  
2:30PM - 5:00PM

# Joint IOU Response<sup>1</sup>

- **Southern California Edison (SCE)**
  - \$6.8M unspent in 2022, all of which can be carried over to 2023 for customers.
- **Southern California Gas Company (SoCalGas)**
  - \$25M unspent in 2022, \$15M of which can be carried over for use in 2023 by customers, and \$10M of which will be used to offset future collections (will not be used for customers)
- **San Diego Gas and Electric (SDG&E)**
  - \$11M unspent in 2022, to be used to offset future collections
  - \$2.2M in previously committed MF-CAM funding will be used for MF-CAM activities in 2023
- **Pacific Gas and Electric (PG&E)**
  - \$48M unspent in 2022, nearly all of which is for MF-CAM/Pilots and can be committed for use in 2023
- **All IOUs**
  - Of the \$412M in funds authorized for 2022, \$319M was spent. Of the remaining \$93M, \$72M can be carried over for customer use in 2023 or beyond, and \$21M will be unspent and used to offset future revenue collection

<sup>1</sup> Provide by Energy Division (ED) – summarizes information from the ED data request.



# Southern California Edison

# SCE's ESA Program Components

	Program Status	Budget spent through Feb 2023 YTD	Customer treated through Feb 2023 YTD
Main ESA (Basic/Plus) Program	Launched	10%	1,000
Southern Multifamily Whole Building (MFWB)	Pre-launch	0%	0
ESA Whole Home Pilot (Joint SCE/SoCalGas)	Launched	\$27,200 or .07%	0
Building Electrification (BE) Pilot (SCE Only)	Launched	\$10,324 or .01%	0
Clean Energy Homes (CEH) Pilot (SCE Only)	Pre-launch	\$4,849 or .02%	0

# ESA Implementation Challenges

- **PY2022** - Focused on operational constraints due to reduced budgets. Mitigate continued impacts due to Covid-19 pandemic (such as supply chain issues).
- **PY2023** - Transition to new program design: Customer-centered, Targeting High User with Deep Energy Savings. SCE contractor structure: Fewer contractors capable of both enrollment and installation; reducing customer visits and improving quality and safety.

Category	2022	What can we do better in 2023?
<b>Goal achievement</b>	<p><b>Challenges:</b> Change from Homes Treated to savings focus</p> <p><b>Success:</b> Achieved and exceeded kWh and Household Treated goals set by CPUC</p>	<ul style="list-style-type: none"> <li>• Targeting and treatment based on deep energy savings opportunities</li> <li>• Offer “beneficial measures” to ensure we met goals</li> </ul>
<b>Budget management</b>	<p><b>Challenges:</b> Reduced budget operational constraints</p> <p><b>Success:</b> Controlled expenditures to stay within the authorized budget, Minimal unspent funds. Prepared to commit funds in 2023</p>	<ul style="list-style-type: none"> <li>• Continue to monitor budget spend to ensure authorized budget is available throughout PY2023</li> <li>• Monitor pricing for materials and supply chain issues</li> </ul>
<b>Customer engagement</b>	<p><b>Challenges:</b> Waitlist due to ratio of interested customer and available budget</p> <p><b>Success:</b> Customers prioritized in 2023</p>	<ul style="list-style-type: none"> <li>• Revised direct targeting collateral. March for first campaign</li> <li>• Targeting newly eligible FERA customers</li> <li>• SCE targeted lead for high users to align with new program direction. Although slow start, SCE is working to resolve all system issues affecting lead to contractors are being affected by ESA system issues</li> </ul>
<b>Solicitation process</b>	<p><b>Challenges:</b> Contractor education on the bidder process</p> <p><b>Success:</b> SCE provided early notification, information and training/workshop opportunities to the prospective bidder community to prepare for the various RFP's launched in 2022. Able to award contracts.</p>	<ul style="list-style-type: none"> <li>• SCE is not expecting to have any active solicitations in 2023</li> </ul>
<b>Contractor and Program management</b>	<p><b>Challenges:</b> Budget concerns, communication, supply chain issues, new systems for both invoicing and program management</p> <p><b>Success:</b> Continued to improve on contractor communication with one-on-one meetings, emails, quarterly briefings, etc. Continue to have assigned SCE coordinators for contractors</p>	<ul style="list-style-type: none"> <li>• Communicate early and often on system issues</li> <li>• Plan training for new database</li> <li>• Communicate and educate early on any unforeseen process changes (e.g., SCE safety requirements for high-risk work)</li> <li>• Visit contractors on the field to conduct safety observations</li> </ul>

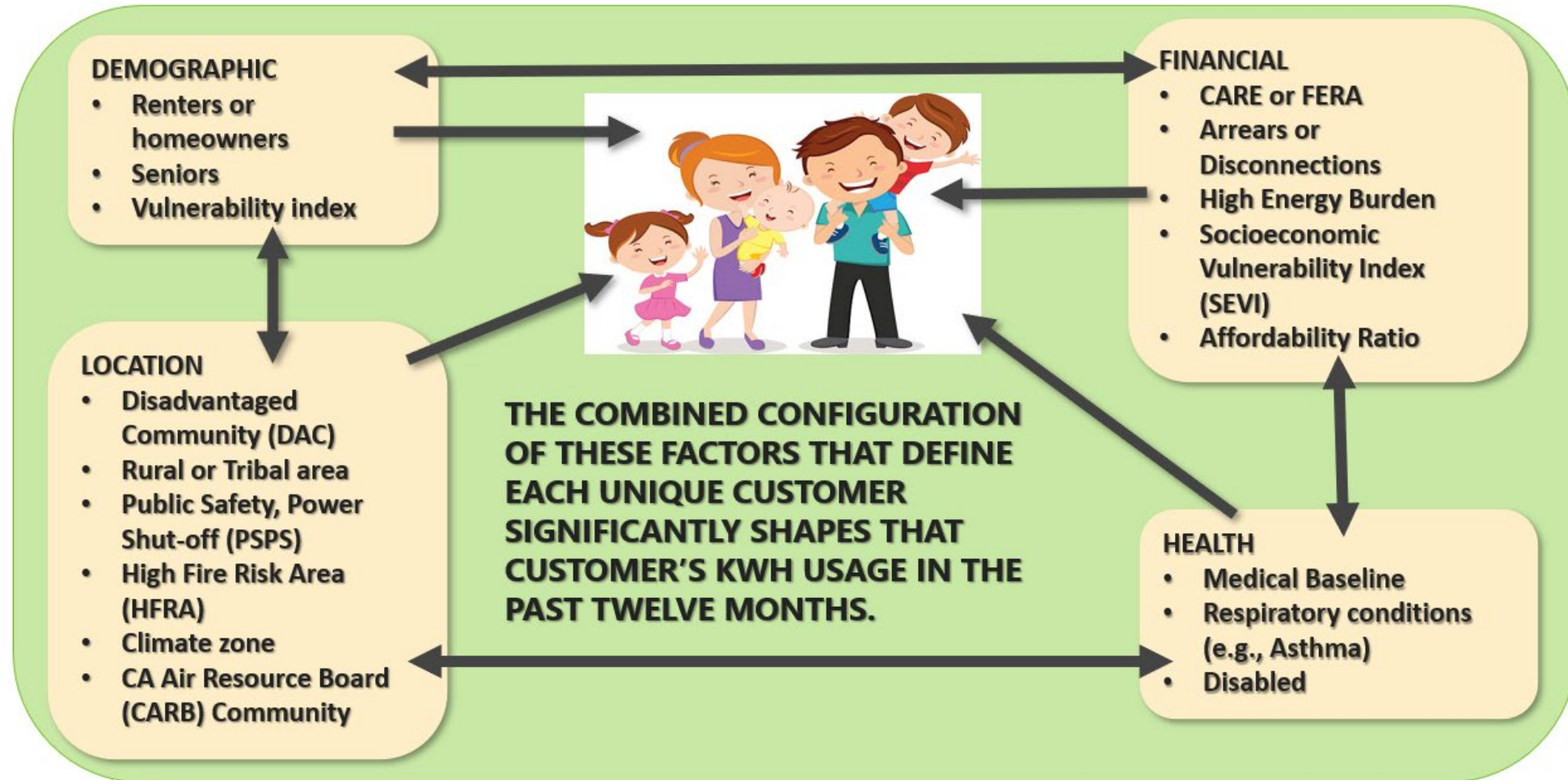
# Customer Segmentation - Table 7

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 Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Energy Savings (kWh) 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
<b>Demographic</b>											
Housing Type											
SF	1,091,750	81	0%	3	2700%	618	618	0.106	-0.005	-0.005	\$ 3,268
MH	118,960	11	0%	1	1100%	523	523	0.065	0.000	0.000	\$ 2,876
MF In-Unit	442,786	6	0%	-	0%	593	593	0.077	0.000	0.000	\$ 3,014
Rent vs. Own											
Own	707,343	71	0%	3	2367%	615	615	0.110	-0.006	-0.006	\$ 3,795
Rent	949,219	27	0%	1	2700%	583	583	0.071	0.000	0.000	\$ 1,665
Previous vs. New Participant											
Previous	-	32	0%	-	0%	554	554	0.107	-0.013	-0.013	\$ 2,995
New Participant	27,051	66	0%	4	1650%	631	631	0.096	0.000	0.000	\$ 3,312
Seniors	477,067	37	0%	1	3700%	592	592	0.096	-0.011	-0.011	\$ 3,481
Veterans	96,723		0%		0%						
Hard-to-Reach [4]	1,352,338	93	0%	3	3100%	619	619	0.102	-0.004	-0.004	\$ 3,137
Vulnerable [5]	603,866	36	0%	2	1800%	581	581	0.095	0.000	0.000	\$ 2,927
<b>Location</b>											
DAC	577,425	48	0%	1	4800%	591	591	0.095	-0.008	-0.008	\$ 2,940
Rural	254,023	54	0%	2	2700%	613	613	0.095	0.000	0.000	\$ 3,795
Tribal	8,832	7	0%	-	0%	524	524	0.065	0.000	0.000	\$ 4,338
PSPS Zone	635,632	0	0%	-	0%	0	0	0.000	0.000	0.000	\$ -
Wildfire Zone	281,693	73	0%	4	1825%	638	638	0.111	-0.006	-0.006	\$ 2,940
Climate Zone 06	251,001		0%		0%						
Climate Zone 08	391,005	2	0%	-	0%	592	592	0.071	0.000	0.000	\$ 1,496
Climate Zone 09	314,012	2	0%	-	0%	790	790	0.190	0.000	0.000	\$ 1,233
Climate Zone 10	353,775	41	0%	1		656	656	0.118	-0.010	-0.010	\$ 1,453
Climate Zone 13	81,749	27	0%	-	0%	516	516	0.082	0.000	0.000	\$ 4,843
Climate Zone 14	170,693	15	0%	1	1500%	705	705	0.101	0.000	0.000	\$ 4,312
Climate Zone 15	56,370	10	0%	2	500%	465	465	0.060	0.000	0.000	\$ 5,263
Climate Zone 16	37,835	1	0%	-	0%	578	578	0.069	0.000	0.000	\$ 1,296
CARB Communities [6]	186,716	7	0%	-	0%	652	652	0.159	0.000	0.000	\$ 1,315
<b>Financial</b>											
CARE	1,276,922	78	0%	2	3900%	633	633	0.107	-0.005	-0.005	\$ 3,202
FERA	221,674		0%		0%						
Disconnected [7]	0		0%		0%						
Arrearages	687,677	39	0%	2	1950%	551	551	0.088	-0.010	-0.010	\$ 3,069
High Usage	69,406	2	0%	-	0%	578	578	0.069	0.000	0.000	\$ 1,388
High Energy Burden [8]	523,397	54	0%	3	1800%	597	597	0.090	0.000	0.000	\$ 4,114
SEVI [9]											
Low [9]	246,113	34	0%	1	3400%	573	573	0.096	-0.012	-0.012	\$ 3,358
Medium [9]	752,969	30	0%	2	1500%	642	642	0.092	0.000	0.000	\$ 3,820
High [9]	657,481	33	0%	1	3300%	616	616	0.111	0.000	0.000	\$ 2,425
Affordability Ratio [10]	104,713	8	0%	-	0%	536	536	0.090	0.000	0.000	\$ 1,987
<b>Health Condition</b>											
Medical Baseline	26,355	3	0%	-	0%	230	230	0.034	-0.136	-0.136	\$ 4,928
Respiratory [11]											
Low [11]	435,556	33	0%	2	1650%	609	609	0.094	0.000	0.000	\$ 2,977
Medium [11]	635,992	32	0%	2	1600%	634	634	0.110	-0.013	-0.013	\$ 2,891
High [11]	585,015	32	0%	-	0%	584	584	0.096	0.000	0.000	\$ 3,889
Disabled	341,251	8	0%	0	0%	514	514	0.066	0.000	0.000	\$ 3,135

SCE conducts a direct targeting approach. We use predictive statistical analytics to identify customers who are more likely to be eligible for ESA services.

This includes predictive statistical models to estimate the probability and levels of high usage customers based on their socioeconomic, demographic, and geographic profiles. Many of these profiles are considered customer segments in Table 7.

# SCE's Targeted Approach



# SCE – Unspent Funds

	Estimated Committed \$\$	Estimated Spent \$\$	Estimated Remaining Committed \$\$
TOTAL	\$6,812,622	\$579,425*	\$6,233,197

*\*Includes January (\$231,381) and February (\$348,044)*

*Note:* Numbers provided are for ESA Main and does not include MF CAM. Reconciliation for the annual report has not been completed, so the numbers above are preliminary. SCE expects to spend all remaining committed funds before the end of 2023 on those customers that were enrolled in PY2022 awaiting installations.



# **Southern California Gas Company**

# SoCalGas' ESA Program Components

	Program Status	Budget spent through Feb 2023 YTD	Customer treated through Feb 2023 YTD
Main ESA (Basic/Plus) Program	Launched to customers for PY2023 on January 1, 2023	4.52%	4,392
ESA Whole Home Pilot (Joint SCE/SoCalGas)	Launched	\$27,000 (0.07%)	0

# ESA Implementation Challenges

Category	What went well in 2022?	What can we do better in 2023?
<b>Goal achievement</b>	<p>SoCalGas is expected to exceed its homes treated target of 94,600 by treating approximately 105,000 homes in 2022.</p> <p>SoCalGas restructured agreements and compensation for 2023 to align with the new ESA Program focus on achieving therm savings.</p>	<p>Continue refocusing the program and the contractor network to target customer with higher measure savings opportunities. Need to balance high savings measures with certain low savings HCS measures to optimize budget utilization and meet savings goals.</p>
<b>Budget management</b>	<p>SoCalGas executed PY2023 contractor budgets without delay to ensure no interruption to contractor work or delivery of program services to customers.</p>	<p>Develop internal procedures to commit budget dollars for work started in one year, but not completed until the following year.</p>
<b>Customer engagement</b>	<p>SoCalGas worked throughout the year to enhance its existing technology platform to provide program contractors with tools to identify and outreach to customers in the various Targeted Population need states.</p>	<p>Continue refining customer data both collected from customers and developed internally with advanced meter and data analytics to better target program services to customers demonstrating the greatest therm savings potential.</p>
<b>Solicitation process</b>	<p>SoCalGas successfully finalized negotiations with 15 contractors as part of the Main ESA Program contractor network solicitation for contracts beginning in 2023.</p> <p>All 2023 contractor contracts were executed on time as we transitioned the Program and offboarded contractors not returning to the Program while maintaining program continuity and servicing customer at a high rate</p> <p>Finalizing the Software Technology Platform solicitation and negotiations to support the “uberization” of the ESA Program.</p>	<p>SoCalGas does not plan to hold a solicitation in 2023.</p>
<b>Contractor management</b>	<p>SoCalGas tracked contractor production regularly and frequently to optimize and shift funding from low producing contractors to higher producing contractors.</p> <p>SoCalGas developed contractor training, email notifications and updated the current software technology platform to shift contractor focus to therm savings goals and installing high therm saving measures</p>	<p>SoCalGas can further optimize its contractor budget allocations and ensure contractors spend allocated amounts to fully utilize program budget for the year.</p>

# Customer Segmentation - Table 7

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

Southern California Gas Company December 2022											
ESA Main (SF, MH, MF in-unit)											
Customer Segment	# of Households Eligible* [1]	# of Households Treated [17]	Enrollment Rate - (C/F)	# of Households Contacted	Rate of Uptake - (C/F)	Avg. Energy Savings (kWh) Per Treated Household (Energy Saving and HCS)	Avg. Energy Savings (kWh) Per Treated Household (Energy Saving Measure)	Avg. Peak Demand Energy Savings (kW) Per Treated Household	Avg. Energy Savings (Thermal) Per Treated Household (Energy Saving and HCS Measure)	Avg. Energy Savings (Thermal) Per Treated Household (Energy Saving Measure Only)	Avg. Cost Per Treated Household
<b>Demographic</b>											
<b>Housing Type</b>											
SF	1,144,224	61,011	5%	623,163	9.8%				6.8	9.9	\$ 761
MH	127,608	4,497	4%	675	666.2%				5.2	8.7	\$ 646
MF In-Unit	802,673	28,071	3%	215,463	13.0%				3.7	3.9	\$ 154
<b>Rentor, Own</b>											
Own	868,032	47,568	5%		0.0%				6.5	11.1	\$ 917
Rent	1,452,048	46,003	3%		0.0%				5.1	4.9	\$ 219
Vacant		8			0.0%				4.8	5.7	\$ 284
<b>Previous or New Participant</b>											
New participant		36,175		294,220	12.3%				6.2	8.3	\$ 557
Previous Participant		57,404		545,634	10.5%				5.5	7.9	\$ 584
<b>Senior [3]</b>											
	956,433	22,195	2%		0.0%				5.9	9.3	\$ 727
<b>Veteran [4]</b>											
	148,977	185	0%		0.0%				5.5	7.7	\$ 678
<b>Hard-to-Reach [5]</b>											
	860,498	54,372	6%	325,972	16.7%				5.0	6.3	\$ 397
<b>Vulnerable [6]</b>											
	1,482,526	85,919	6%	773,772	11.1%				5.6	7.7	\$ 546
<b>Location</b>											
<b>DAC [7]</b>											
Rural	1,438,213	83,916	6%	759,344	11.1%				5.5	7.7	\$ 541
Tribal [8]	312,545	9,236	3%	70,719	13.9%				9.2	11.2	\$ 801
FSPS Zone	4,892	35	1%	505	6.9%				5.9	8.8	\$ 891
Wildfire Zone [9]	N/A	N/A	N/A	N/A	N/A						
Climate Zone	1,007,391	38,097	4%	370,509	10.3%				7.1	9.3	\$ 663
<b>4</b>											
	12,320	172	1%	582	29.6%				5.8	6.8	\$ 545
<b>5</b>											
	44,102	1,619	4%	9,316	17.3%				7.7	12.3	\$ 970
<b>6</b>											
	209,415	4,123	2%	24,553	16.8%				4.4	6.7	\$ 403
<b>8</b>											
	475,858	28,842	6%	248,262	11.6%				2.9	6.0	\$ 440
<b>9</b>											
	640,547	21,614	3%	186,842	11.6%				5.9	6.5	\$ 428
<b>10</b>											
	362,539	23,280	6%	252,574	9.2%				7.4	10.0	\$ 738
<b>13</b>											
	143,641	6,630	5%	40,316	16.4%				10.4	12.1	\$ 876
<b>14</b>											
	65,736	2,267	3%	31,358	7.2%				11.7	14.4	\$ 876
<b>15</b>											
	102,386	3,085	3%	20,683	14.9%				6.5	8.4	\$ 667
<b>16</b>											
	32,086	1,951	6%	24,657	7.9%				5.3	9.9	\$ 703
CARB Communities	270,239	22,703	8%	193,313	11.7%				23.9	33.1	\$ 2,363
<b>Financial</b>											
CARE	1,605,166	62,356	4%	470,654	13.2%				6.2	8.6	\$ 623
Disconnected [2]	-	-	-	-	0.0%						
Arrearage [11]	760,850	49,473	7%	403,208	12.3%				5.5	7.4	\$ 506
High Usage [12]	691,102	30,506	4%	285,694	10.7%				6.0	8.7	\$ 651
High Energy Burden [13]		849			0.0%				6.5	8.8	\$ 667
<b>SEVI [14]</b>											
<25%	571	1	0%	16	6.3%				-	-	\$ 97
25%-50%	-	-	-	-	0.0%						
50%-75%	1,181,494	37,338	3%	400,423	9.3%				6.6	9.5	\$ 712
>75%	465,748	40,329	9%	292,772	13.8%				4.6	6.2	\$ 413
<b>Affordability Ratio [15]</b>											
<25%	1,538,139	69,663	5%	627,369	11.1%				5.9	0.4	\$ 586
25%-50%	16,540	2,057	12%	11,563	17.8%				3.7	275.6	\$ 292
50%-75%	1,395	65	5%	1,007	6.5%				5.7	158.4	\$ 430
>75%	91,737	5,883	6%	53,271	11.0%				2.9	0.1	\$ 305
<b>Health Condition</b>											
Medical Baseline	9,587	1,210	13%	5,050	24.0%				6.7	10.1	\$ 804
<b>Respiratory [16]</b>											
<25%	272,610	2,498	1%	16,356	15.3%				6.2	8.6	\$ 626
25%-50%	433,249	13,594	3%	114,747	11.8%				6.1	8.3	\$ 572
50%-75%	505,591	30,408	6%	286,594	10.6%				5.5	7.6	\$ 559
>75%	436,361	31,168	7%	275,513	11.3%				5.2	7.7	\$ 542
Disabled [14]	634,790	7,415	1%		0.0%				6.3	9.0	\$ 704

# SoCalGas – Unspent Funds

- **ESA Main:** \$10 million or 8.6% of authorized ESA Main budget will be used to offset future collections. SoCalGas did not commit FY2022 budget dollars but is in the process of identifying internal procedures to commit FY2023 budget dollars for work opened in FY2023 and planned to be completed in FY2024 and moving forward, for future years in the Program Cycle.
- **ESA MFWB:** \$8 million to be carried over into FY2023.
- **ESA Whole Home Pilot (Joint SCE/SoCalGas):** \$6.5 million to be carried over into FY2023.

# San Diego Gas & Electric Company



# SDG&E's ESA Program Components

	Program Status	Budget spent through Jan 2023 YTD	Customer treated through Jan 2023 YTD
ESA Main (Basic/Plus) Program	Launched to customers	2%	0% reported
Southern Multifamily Whole Building (MFWB)	Ramp Up	0	0
MF-CAM	On-going	7%	0
Pilot 1	Solicitation phase	0	0

# ESA Implementation Challenges continued

## **SDG&E 2022 Program Challenges**

- Simultaneous programmatic changes
  - Transition from Homes Treated to Energy Savings
  - New program design
  - Split of MF from SF/MH
- Multiple solicitations in market stretched contractors and IOU personnel (MFWB, ESA Main, Pilot Plus/Pilot Deep)
  - Contractors became more selective with bidding
  - Impacted timing for contract negotiations
- Transition to new Program Implementer model
  - Transition slowed the last quarter enrollments as contracts were ending in 2022
  - System set-up was more challenging than anticipated, impacting a smooth roll-out in 2023
- Unsuccessful results of initial Pilot Plus and Pilot Deep solicitation
  - Additional solicitation was necessary, delaying the pilot launch
- Supply chain issues in 2022 delayed installation for HVAC and MF CAM



# ESA Implementation Challenges

Category	2022 Program Overview	Program Opportunities in 2023?
<b>Goal achievement</b>	<ul style="list-style-type: none"> <li>SDG&amp;E is expected to be above 90% of the home treated goal for 2022</li> <li>ESA CAM participation significantly improved in 2022</li> </ul>	<ul style="list-style-type: none"> <li>Achieve energy savings goals</li> <li>Use the new flexible measure modification process to add energy savings measures to the program throughout the program cycle</li> </ul>
<b>Budget management</b>	<ul style="list-style-type: none"> <li>Final ESA Program budget not available</li> <li>ESA Program contractor spend was within contracted values</li> </ul>	<ul style="list-style-type: none"> <li>Improve contractor spend on homes providing energy savings</li> <li>Engage contractors earlier on opportunities to improve program spend</li> <li>Develop a process for committing unspent/uncommitted funds</li> </ul>
<b>Customer engagement</b>	<ul style="list-style-type: none"> <li>Drove ESA program participation by leveraging joint activities</li> <li>Targeted marketing efforts, including email campaigns to targeted zip codes, and special initiatives with Smart Thermostats</li> </ul>	<ul style="list-style-type: none"> <li>Engagement of customers based on energy savings potential</li> <li>Improvement of program transition to new ESA program energy savings models</li> </ul>
<b>Solicitation process</b>	<ul style="list-style-type: none"> <li>Completed multiple solicitations for the MFWB, Main ESA Program, Pilot Plus and Pilot Deep</li> <li>Successfully completed contract negotiations for the Main ESA and southern region MFWB program SDG&amp;E ESA Program implementation</li> </ul>	<ul style="list-style-type: none"> <li>Manage contract solicitation timelines to ease the burden to program contractors</li> <li>Reduce the number of program changes at one time, to reduce the need for concurrent solicitations and improve RFP responses</li> </ul>
<b>Contractor management</b>	<ul style="list-style-type: none"> <li>Partnered closely with Main ESA Program O&amp;E contractor to address issues</li> </ul>	<ul style="list-style-type: none"> <li>Energy Saving KPIs to improve ESA Program savings</li> <li>Address issues with contractor underspending earlier</li> </ul>

# Customer Segmentation - Table 7

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

San Diego Gas & Electric  
December 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 (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households	
<b>Demographic</b>												
<b>Housing Type</b>												
SF	170,522	4,453	3%	4,458	100%	88.14	91.49	0.012	-0.657	2.367	\$ 914	
MH	22,468	858	4%	975	88%	186.23	197.16	0.022	13.993	0.637	\$ 1,727	
MF In-Unit	179,480	6,091	3%	5,896	103%	56.40	56.51	0.007	0.406	0.387	\$ 424	
<b>Rent vs. Own</b>												
Own	136,885	2,927	2%	15,662	19%	132.61	140.84	0.018	2.638	2.731	\$ 1,485	
Rent	236,613	8,475	4%	40,950	21%	59.62	59.92	0.008	0.610	0.602	\$ 433	
<b>Previous vs. New Participant</b>												
Previous	N/A	7,835	57%	54,364	14%	72.18	74.27	0.010	0.963	1.161	\$ 707	
New Participant	13,760	3,567	26%	59,874	6%	101.15	101.64	0.014	1.753	1.272	\$ 806	
Seniors	166,246	1,989	1%	X	0%	105.13	109.67	0.013	3.618	1.625	\$ 1,107	
Veterans [4]	44,771	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Hard-to-Reach [5]	N/A	4,284	0%	X	0%	58.80	58.89	0.008	0.372	0.377	\$ 435	
Vulnerable [6]	160,375	3,958	2%	25,904	15%	63.88	64.78	0.008	0.918	0.936	\$ 619	
<b>Location</b>												
DAC	90,092	2,218	2%	14,298	16%	60.94	61.76	0.008	0.629	1.097	\$ 612	
Rural	8,611	193	2%	2,588	7%	127.99	132.50	0.016	2.404	1.266	\$ 949	
Tribal	21,716	84	0%	1,438	6%	170.81	170.81	0.023	-0.450	0.113	\$ 681	
PSPS Zone	131,968	90	0%	1,437	6%	176.06	179.35	0.022	3.563	0.265	\$ 894	
Wildfire Zone [15]	63,552	596	1%	10,509	6%	135.52	138.15	0.018	2.096	0.713	\$ 828	
Climate Zone 6	16,775	55	0%	3,891	1%	184.17	184.17	0.023	-0.036	-0.036	\$ 660	
Climate Zone 7	244,028	7,371	3%	78,062	9%	73.40	74.60	0.010	0.626	1.231	\$ 709	
Climate Zone 8	4,649	15	0%	1,234	1%	63.61	63.61	0.008	0.000	0.000	\$ 338	
Climate Zone 10	99,636	3,906	4%	34,164	11%	90.93	93.62	0.012	2.262	1.165	\$ 790	
Climate Zone 14	3,490	42	1%	696	6%	195.39	195.39	0.025	-0.009	-0.009	\$ 652	
Climate Zone 15	1,084	13	1%	129	10%	194.96	206.43	0.023	2.737	0.251	\$ 1,081	
CARB Communities [7]	293,478	1,650	1%	10,466	16%	67.00	67.49	0.009	1.259	1.162	\$ 675	
<b>Financial</b>												
CARE	289,316	10,562	4%	114,090	9%	74.87	76.25	0.010	0.603	1.215	\$ 686	
FERA	43,709	147	0%	1,884	8%	44.08	44.08	0.006	-0.130	0.724	\$ 526	
Disconnected [8]	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A	
Arrearages [9]	144,053	4,636	3%	38,526	12%	77.64	78.33	0.011	0.668	0.943	\$ 598	
High Usage [10]	52,414	893	2%	8,700	10%	84.70	86.75	0.012	-0.021	1.189	\$ 708	
High Energy Burden [11]	132,033	1,878	1%	13,846	14%	74.56	75.46	0.010	1.143	1.234	\$ 651	
<b>SEVI [12]</b>												
Low	275,414	1,345	0%	25,751	5%	124.36	128.79	0.017	0.959	1.409	\$ 883	
Medium	318,131	3,300	1%	43,487	8%	91.99	94.37	0.012	1.414	1.273	\$ 817	
High	243,149	6,711	3%	48,085	14%	64.97	66.05	0.009	1.090	1.114	\$ 663	
Affordability Ratio [13]	35,421	1,253	4%	9,810	13%	55.07	55.32	0.007	0.402	0.736	\$ 481	
<b>Health Condition</b>												
<b>Medical Baseline</b>												
<b>Respiratory [14]</b>												
Low	283,333	3,833	1%	52,064	7%	431310.85	102.89	57.517	6390.060	1.098	\$ 3,301,954	
Medium	195,497	4,003	2%	37,917	11%	315987.94	75.13	42.128	5245.211	1.229	\$ 3,145,509	
High	113,025	3,520	3%	27,342	13%	252471.75	66.50	33.419	2936.601	1.270	\$ 2,715,784	
Disabled	115,907	830	1%	N/A	0%	118.67	120.82	0.015	3.765	1.921	\$ 1,168	



# SDG&E – Unspent Funds

SDG&E did not commit 2022 unspent/uncommitted funds to the 2023 program year for the Main ESA Program. SDG&E committed \$2.2M in previously committed unspent MF CAM budget towards 2023 program activities. Actual spend for ESA Program activities through January 2023 is reported below.

- ESA Main Program (SF, MH and In-Unit) Spend: \$512,549
- ESA Multifamily Common Area Measures: \$151,578
- ESA Multifamily Whole Building: \$0
- ESA Pilot Plus and Pilot Deep: \$0

# Pacific Gas & Electric Company

# PG&E's ESA Program Components

	Program Status	Budget spent through Feb 2023 YTD	Customer treated through Feb 2023 YTD
Main ESA (Basic/Plus) Program	Launched to customers	11%	11,022
Northern Multifamily Whole Building (MFWB)	Pre-launch	0	0
ESA Whole Home Pilot	Launched to customers	2%	1

# ESA Implementation Challenges

Category	What went well in 2022?	What can we do better in 2023?
Goal achievement	Savings goal reached.	Measure mix modifications to approach and reach 0.7 ESACET
Budget management	Spent 104% of the ESA Main authorized budget; (fund-shifted \$5.4M from MF - CAM/CSD Leveraging budget to cover the overspend).	Pilot Plus and Pilot Deep budget can be carried forward into future years. PG&E's Implementation Plan Advice Letter noted that PG&E intends to concentrate pilot budget in 2023-2025.
Customer engagement	Targeted postcards/emails promoting measures that customers are likely to be qualified for (ex. Smart Thermostats to customers that indicate they have a forced air furnace via home energy audit or other means of identification).	Continue to identify ways to identify customers that will qualify for high saving measures.  Ex. In 2023, PG&E ran a query of all field orders completed in 2022 indicating the customer had a forced air furnace and was enrolled in CARE/FERA. We will market specific items to these customers such as Prescriptive Duct Sealing, Smart Thermostat, etc.
Solicitation process	PG&E completed the solicitation process.	For future solicitations (beyond 2023), stagger solicitations across the year and/or program cycle.
Contractor Engagement	Continued communication regarding budgets in comparison to authorized amounts and current spend levels.  Open discussion forum on measure modifications at quarterly meetings.	Intentional engagement with contractors

# Customer Segmentation - Table 7

Energy Savings Assistance Program Table 7 - Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions \*\*  
Pacific Gas and Electric Company  
Through December 31, 2022

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
<b>Demographic</b>											
<b>Housing Type</b>											
SF	1,213,009	52,554	4%	106,760	49%	406.74	407.85	0.09	19.11	19.84	\$ 1,303
MH	117,468	5,542	5%	10,457	53%	319.94	320.04	0.09	13.57	14.24	\$ 1,173
MF In-Unit	491,864	9,455	2%	24,512	39%	206.67	206.67	0.02	10.16	10.18	\$ 692
<b>Rent vs. Own</b>											
Own	722,005	39,403	5%	78,152	50%	421.89	422.94	0.11	20.63	21.67	\$ 1,471
Rent	1,100,330	28,148	3%	65,177	43%	301.23	301.85	0.05	12.89	12.93	\$ 837
<b>Previous vs. New Participant</b>											
New	1,440,864	59,299	4%	64,035	93%	354.05	354.74	0.08	17.70	18.19	\$ 1,156
Previous	381,476	8,252	2%	8,506	97%	497.84	500.02	0.11	15.27	16.84	\$ 1,569
Seniors [6]	756,944	29,229	4%	29,861	98%	365.18	365.78	0.09	17.35	18.04	\$ 1,245
Veterans [18]	148,890	*	*	*	*	*	*	*	*	*	*
Hard-to-Reach [7]	792,159	9,805	1%	34,011	29%	366.51	367.69	0.07	16.04	16.65	\$ 1,110
Vulnerable [8]	687,389	35,628	5%	39,845	89%	331.12	332.39	0.08	17.65	18.15	\$ 1,162
<b>Location</b>											
DAC	562,067	16,552	3%	16,797	99%	335.57	337.20	0.08	18.13	18.96	\$ 1,302
Rural	367,782	13,870	4%	28,337	49%	363.11	364.35	0.09	15.86	16.40	\$ 1,165
Tribal [20]	1,967	2	0%	3	67%	545.13	545.13	0.07	3.82	3.82	\$ 2,176
PSPS Zone	222,332	6,069	3%	6,929	88%	375.97	376.03	0.07	13.01	13.24	\$ 941
Wildfire Zone [9]	82,444	435	1%	474	92%	336.96	336.96	0.04	3.59	3.65	\$ 539
Climate Zone 1 (PG&E)	28,937	355	1%	1,551	23%	328.13	328.13	0.09	13.77	14.18	\$ 1,169
Climate Zone 2 (PG&E)	115,486	3,177	3%	9,001	35%	285.41	285.41	0.05	12.20	12.46	\$ 862
Climate Zone 3 (PG&E)	425,730	16,436	4%	36,185	45%	271.92	271.92	0.03	11.43	11.91	\$ 776
Climate Zone 4 (PG&E)	157,752	3,871	2%	13,245	29%	346.92	346.92	0.06	16.89	17.34	\$ 1,123
Climate Zone 5 (PG&E)	43,176	2,150	5%	4,845	44%	439.92	439.92	0.03	-0.86	-0.86	\$ 518
Climate Zone 11 (PG&E)	153,226	3,477	2%	14,201	24%	364.78	364.78	0.12	16.13	16.58	\$ 1,217
Climate Zone 12 (PG&E)	573,718	17,377	3%	56,206	31%	480.52	481.01	0.12	24.76	25.39	\$ 1,514
Climate Zone 13 (PG&E)	299,175	20,462	7%	51,805	39%	375.07	377.49	0.09	19.12	20.05	\$ 1,437
Climate Zone 14 (PG&E)	5,991	3	0%	293	1%	187.95	187.95	0.06	8.51	16.65	\$ 2,129
Climate Zone 16 (PG&E)	19,146	136	1%	852	16%	465.99	466.76	0.05	1.48	1.66	\$ 663
CARB Communities [10]	174,113	9,672	6%	10,458	92%	290.49	291.89	0.05	13.19	13.70	\$ 911

# Customer Segmentation - Table 7 continued

<b>Financial</b>												
CARE	1,401,702	61,710	4%	57,636	107%	376.03	376.89	0.08	17.44	18.06	\$	1,214
FERA	174,219	483	0%	624	77%	424.70	425.89	0.09	20.64	21.40	\$	1,327
Disconnected [11]	0	0	0%	0	0	0	0	0	0	0		0
Arrearages [12]	554,495	20,160	4%	20,685	97%	349.54	350.31	0.07	17.03	17.42	\$	1,085
High Usage [13]	31,649	14,614	46%	13,743	106%	378.32	379.51	0.08	17.54	18.34	\$	1,255
High Energy Burden [14]	1,075,439	36,822	3%	56,500	65%	344.56	345.43	0.07	17.07	17.49	\$	1,099
SEVI [15]												
H	602,765	31,497	5%	35,066	90%	346.16	347.00	0.07	17.12	17.53	\$	1,102
M	830,254	24,915	3%	43,259	58%	346.07	346.94	0.07	17.08	17.53	\$	1,103
L	388,211	7,780	2%	8,639	90%	342.98	343.47	0.07	16.94	17.39	\$	1,096
Affordability Ratio [16]	233,227	13,924	6%	15,304	91%	296.38	298.51	0.07	16.99	17.60	\$	1,158
<b>Health Condition</b>												
Medical Baseline	124,753	8,783	7%	8,182	107%	405.55	406.25	0.10	18.02	18.72	\$	1,333
Respiratory (Asthma) [17]												
H	928,252	41,952	5%	62,130	68%	346.70	347.59	0.07	17.08	17.52	\$	1,107
M	543,596	16,365	3%	18,276	90%	343.12	343.81	0.07	17.01	17.42	\$	1,088
L	350,522	5,876	2%	6,558	90%	346.10	346.58	0.08	17.27	17.72	\$	1,107
Disabled	630,364	17,895	3%	18,261	98%	386.34	387.08	0.09	18.21	18.84	\$	1,294



# PG&E – Unspent Funds

PG&E spent 104% of the ESA Main authorized budget in PY 2022, and underspent \$48M, nearly all of which is for MF-CAM/Pilots and committed for use in 2023 in MFWB and PP/PD.

PG&E's ESA Program:	2023 Authorized	YTD Expenses (through February 28, 2023)
ESA Main Program (SF and MH) <sup>[1]</sup>	\$ 127,740,559	\$ 14,666,944
ESA Multifamily In-Unit	\$ 18,452,509	\$ -
ESA Multifamily Common Area Measures <sup>[2]</sup>	\$ 38,764,717	\$ 271,947
ESA Multifamily Whole Building	\$ 16,986,765	\$ -
ESA Pilot Plus and Pilot Deep <sup>[3]</sup>	\$ 16,624,146	\$ 348,253
Building Electrification Retrofit Pilot	\$ -	\$ -
Clean Energy Homes New Construction Pilot	\$ -	\$ -
CSD Leveraging	\$ 1,054,592	\$ 967
MCE Pilot	\$ -	\$ -
SPOC <sup>[4]</sup>	\$ 358,550	\$ 57,194
SASH/MASH Unspent Funds	\$ -	\$ -
<b>ESA Program TOTAL</b>	<b>\$ 219,981,838</b>	<b>\$ 15,345,304</b>

[1] ESA Main Program 2023 authorized budget includes carried forward budget from 2022: \$420,876 for VEC pilot, and \$364,795 for Studies

[2] ESA MF CAM 2023 authorized budget includes committed funds from 2022

[3] ESA Pilot Plus and Pilot Deep 2023 authorized budget includes \$7,841,539 carried forward from 2022

[4] SPOC 2023 authorized budget includes committed funds from 2022

Thank you