



# Joint IOUs Program Highlights

Low Income Oversight Board Meeting  
June 15, 2023

WebEx

Public

# PG&E 2023 Program Summary– As of April 2023



## ESA

Homes treated: 23,771

- 39% YTD

Energy Savings:

- 9,453,577 kWh
  - 26% YTD
- 445,653 therms
  - 31% YTD

% Expenditure: 31% YTD

## CARE

Enrollment: 1,444,520

Enrollment Rate: 103%

Discounts: \$368,037,118

% Adm. Expenditure: 20%

## FERA

Enrollment: 37,199

Enrollment Rate: 23%

Discounts: \$5,751,910

% Adm. Expenditure: 26%

## Additional Highlights

- In Q1 2023, PG&E began ramping up the Northern Multifamily Whole Building Program (N. MFWB), which provides all MF sector services including in-unit and common area measures. In March 2023, PG&E and the implementor (TRC) provided an overview of the MFWB Implementation Plan in a public webinar with ~76 attendees. PG&E plans for a soft launch for enrollment in June 2023 with a full program launch expected later in Q3 2023.
- In April 2023, PG&E finalized its 2023 Tribal Grant Outreach Program and offered four new tribes grant awards of \$20-30k/annually. This is a 2-year grant cycle with an option to renew for a 3rd year, the primary focus will be for tribes to outreach to all tribal members, offering the ESA program, and collecting data for reasons tribal members may decline to participate.
- As of March 31, AMP had a total of 248,338 customers who have enrolled in the program, with a total of \$117M forgiven and 24k customers successfully completing 12-month enrollment since program launch.

# SCE 2023 Program Summary – As of April 2023

## CARE

- Customers Enrolled: 1,155,831
- Enrollment Rate: 88%
- Newly Enrolled Customers: 97,632

## FERA

- Customers Enrolled: 26,383
- Enrollment Rate: 12%
- Newly Enrolled Customers: 3,346

## ESA

- Homes Treated: 212
- Energy Savings: 818,569 kWh

## MF CAM

- Properties Treated: 26
- Current Projects: 6

SCE plans to continue running MF CAM until the Southern Multifamily Whole Building (MFWB) Program is open to participation in July 2023.

## Additional Highlights

### ***Tribal***

- On March 1, 2023, SCE conducted its first Tribal training. The training included various topics including: CARE, FERA, ESA, Medical Baseline, Access and Functional needs programs, along with an overview of grant requirements, Tribal benefits, and an introduction to a new solar billing plan.

### ***Disconnections/AMP***

- In October 2022, SCE's Residential credit collection efforts resumed
- As of April 2023, AMP had 95,546 customers enrolled in the program, with a total of \$31M forgiven since program launch.

# SDG&E 2023 Program Summary– As of April 2023

## CARE

- Customers Enrolled: 353,965
- Newly Enrolled: 25,332
- Enrollment Rate: 117%

## FERA

- Customers Enrolled: 11,737
- Newly Enrolled: 1,014
- Enrollment Rate: 27%

## ESA

- Homes Treated: 992
- kWh Saved: 94,008
- Therms Saved: (170)

## MF CAM

- # of Properties: 4
- kWh Saved: 55,985
- Therms Saved: 2,232

## Additional Highlights

**Tribal:** Tribes completed ESA Meet & Confer – 13

- Offering \$3K in Mini grants

**Contractor Funding:** No issues to report

**Arrearage Forgiveness/Disconnections**

- Neighbor-to-neighbor program has assisted 1,049 customers with pledge dollar totals of \$536,071
- Disconnections/AMP: Residential Disconnections - Zero
- AMP - Number of customers enrolled: 11,660 and \$17.7M in debt forgiveness

# SoCalGas Program Summary – As of April 2023



## CARE

- Customers Enrolled: 1,863,928
- Enrollment Rate: 111%
- Newly Enrolled Customers: 142,324

## ESA Program

- Homes Treated: 12,027
- Therms Saved: 163,985
- Unspent Funds Remaining: \$31.86 M

## MF CAM

- Central Boiler Projects: 2
- Impact: 2 bldgs., 97 units, 115+ tenants
- Therms Saved: 5,974

## Additional Highlights

### Tribal

- Through April 30, SoCalGas has met with 10 tribes and established a point of contact for the Low-Income programs.
- SoCalGas has participated in community events such as the Pechanga Pow Wow and Soboba Tribal Earth Day event.

### Disconnections/AMP

- 149,863 customers enrolled in AMP (as of 4/30/23). Residential credit collections efforts to resume in Q3 2023.

### ESA Program

- Restructured agreements and compensation for 2023 to align with the new focus on achieving therm savings by offering quarterly performance-based incentives for meeting therm savings goal – recently awarded Q1 incentive to contractors
  - We will reallocate unawarded Q1 performance-based incentive amounts to our higher performing contractors in the coming weeks.
- We recently increased our Outreach Compensation Schedule Fees by over 33%.
- We continue to hold dedicated weekly meetings to track contractor spending against their therm savings goals.
  - This information is communicated with the contractors in regularly one-on-one meetings as well as quarterly contractor meetings.



# **Joint IOUs**

## **Energy Savings Assistance Program**

### **Contractor Funding & Solicitations**

# ESA Programs Joint IOUs Solicitations Schedule

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

CAEECC-ESA Program: [www.caeccc.org/energy-savings-assist-programs](http://www.caeccc.org/energy-savings-assist-programs)

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

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

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

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

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

**Last revised June 1, 2023**

Energy Savings Assistance Program Solicitation Schedule		2023																											
ALL DATES ARE SUBJECT TO CHANGE**		April				May				June				July				August				September				October			
		4/1	4/8	4/15	4/22	4/29	5/6	5/13	5/20	5/27	6/3	6/10	6/17	6/24	7/1	7/8	7/15	7/22	7/29	8/5	8/12	8/19	8/26	9/2	9/9	9/16	9/23	9/30	10/7
SCE	Building Electrification Pilot																												
	On-site Energy Meter Pilot																												
	ESB Pilot/On-site Electrification Pilot (Joint SCE/SCG)																												
	ESB Pilot/On-site Electrification Pilot (Joint SCE/SCG)**																												
	Building Electrification and On-site Energy Meter Pilot Evaluation																												
SoCalGas	Information Energy Education																												
	Info: This program is a partnership with SoCalGas and SoCalGas Energy Services. The program is designed to help businesses and organizations reduce energy costs and improve energy efficiency.																												
	ESB Pilot/On-site Electrification Pilot (Joint SCE/SCG)																												
	ESB Pilot/On-site Electrification Pilot (Joint SCE/SCG)**																												
	Building Electrification and On-site Energy Meter Pilot Evaluation																												
PG&E	ESB Pilot/On-site Electrification Pilot (Joint SCE/SCG)																												
	ESB Pilot/On-site Electrification Pilot (Joint SCE/SCG)**																												
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# ESA Update On Contractor Funding

(Jan-April 2023)

Utility	Funding Issue	Impact
PG&E	No issues to report. PG&E spent 31% of the ESA Main authorized budget through April 2023, and expects a full spend of the PY 2023 authorized budget.	N/A
SCE	2022 committed funds and 2023 budget has been allocated to contractors. Contractors are working on expending the allocated budget.	Slow ramp up of new program may mean budget is unspent at the end of 2023 and may not be committed if there are no existing jobs to complete.
SDG&E	No contractor funding issues	None
SoCalGas	No contractor funding issues	None







# Joint IOUs Report of the CARE, FERA and ESA Programs

# CARE Program Budgets and Enrollment

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.

## January – April CARE Program Updates\*

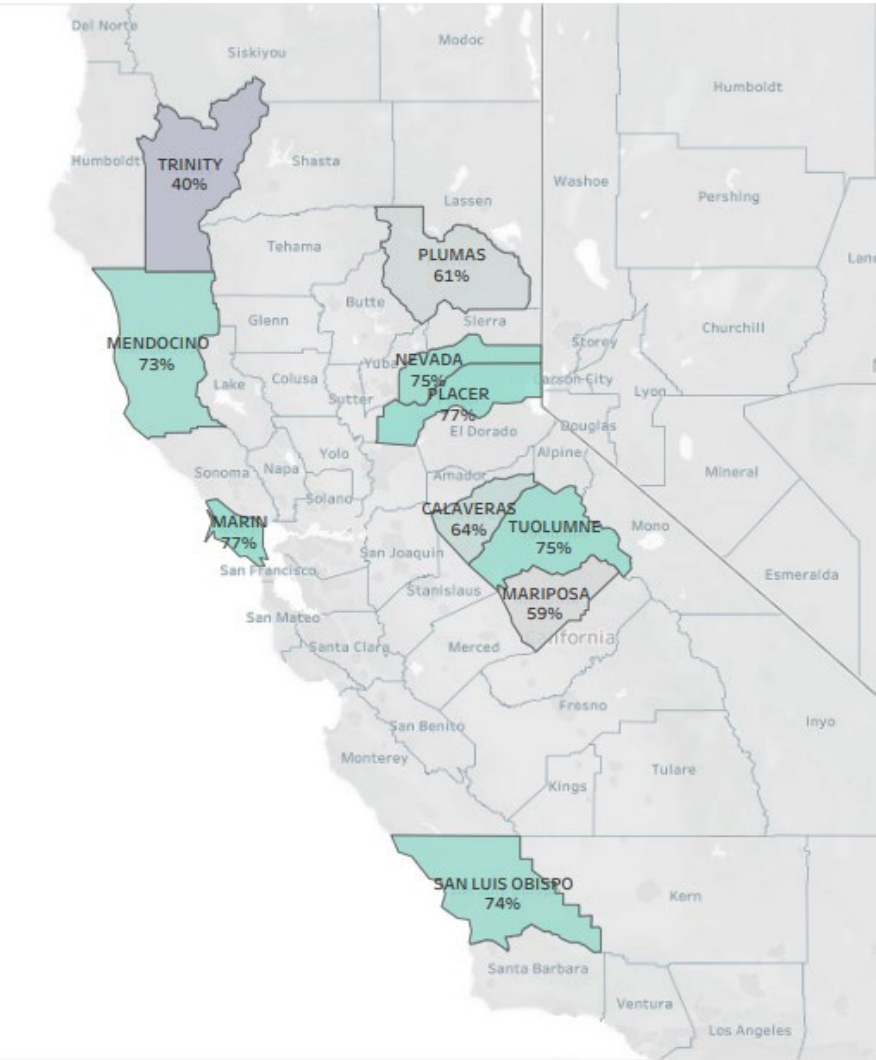
Authorized 2023 Program Budgets and Expenditures				
Utility	2023 Budget	Expenditures	%	Rate Discounts
PG&E	\$13,961,600	\$2,791,345	20%	\$368,037,118
SCE	\$9,128,227	\$1,850,898	20%	\$197,400,115
SDG&E	\$6,922,453	\$1,878,475	27%	\$93,494,168
SoCalGas	\$10,181,364	\$2,631,111	26%	\$165,588,996
<b>Total</b>	<b>\$40,193,644</b>	<b>\$9,151,829</b>		<b>\$824,520,397</b>

Jan-Apr 2023 Enrollment						
Utility	Total Residential Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled**	Enrollment Rate	Newly Enrolled Customers
PG&E	5,480,468	1,402,162	26%	1,444,520	103%	87,447
SCE	4,566,423	1,315,495	29%	1,155,831	88%	97,632
SDG&E	1,395,253	301,966	22%	353,965	117%	25,332
SoCalGas	5,746,513	1,673,671	29%	1,863,928	111%	142,324
<b>Total</b>	<b>17,188,657</b>	<b>4,693,294</b>		<b>4,818,244</b>		<b>352,735</b>

\* Authorized budgets pursuant to Decision (D.)21-06-015. Jan-April 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed May 22, 2023.

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

# CARE Program PG&E Enrollment Map

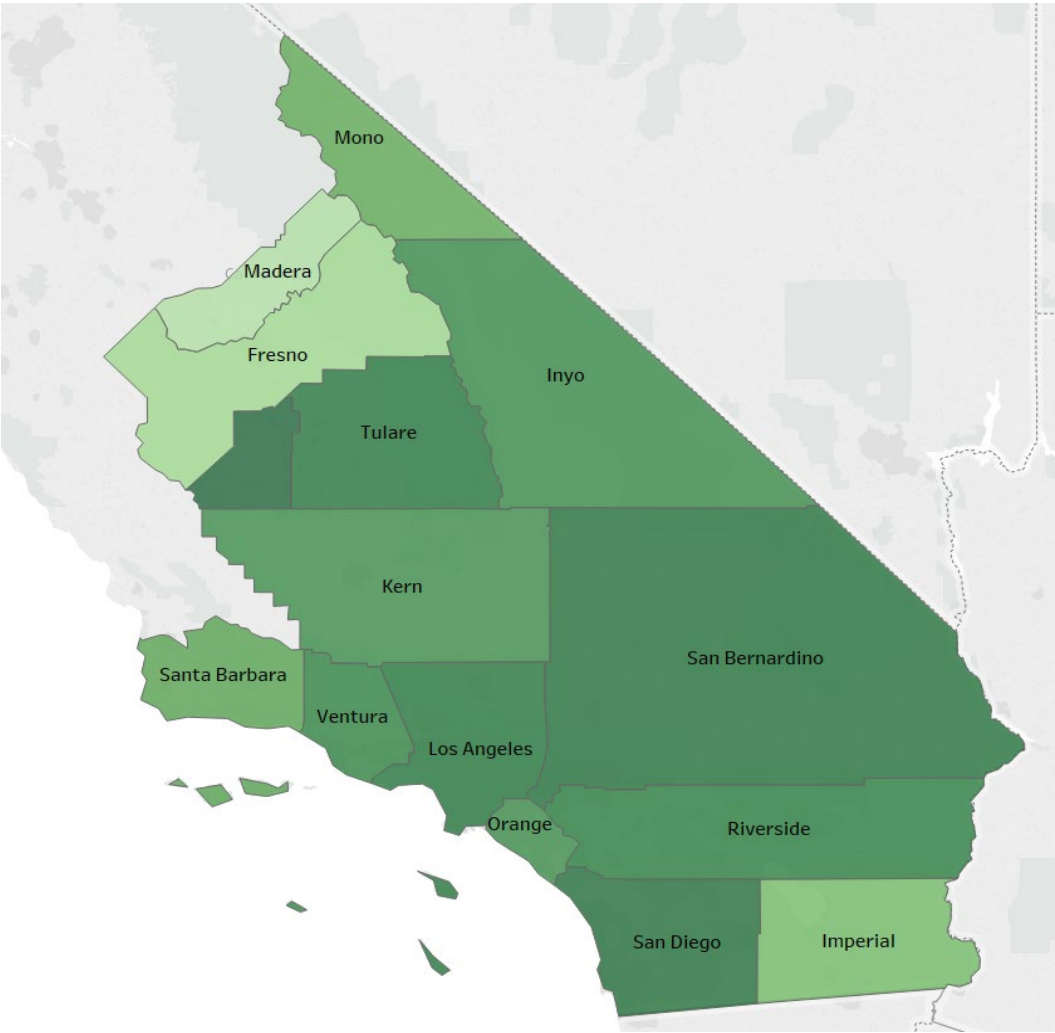


PG&E Counties With Lowest Enrollment Rates	
County	Enrollment Rate*
TRINITY	40%
MARIPOSA	59%
PLUMAS	61%
CALAVERAS	64%
MENDOCINO	73%
SAN LUIS OBISPO	74%
NEVADA	75%
TUOLUMNE	75%
PLACER	77%
MARIN	77%

\*Represents PG&E counties with the lowest enrollment rates, as of April 30, 2023.

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

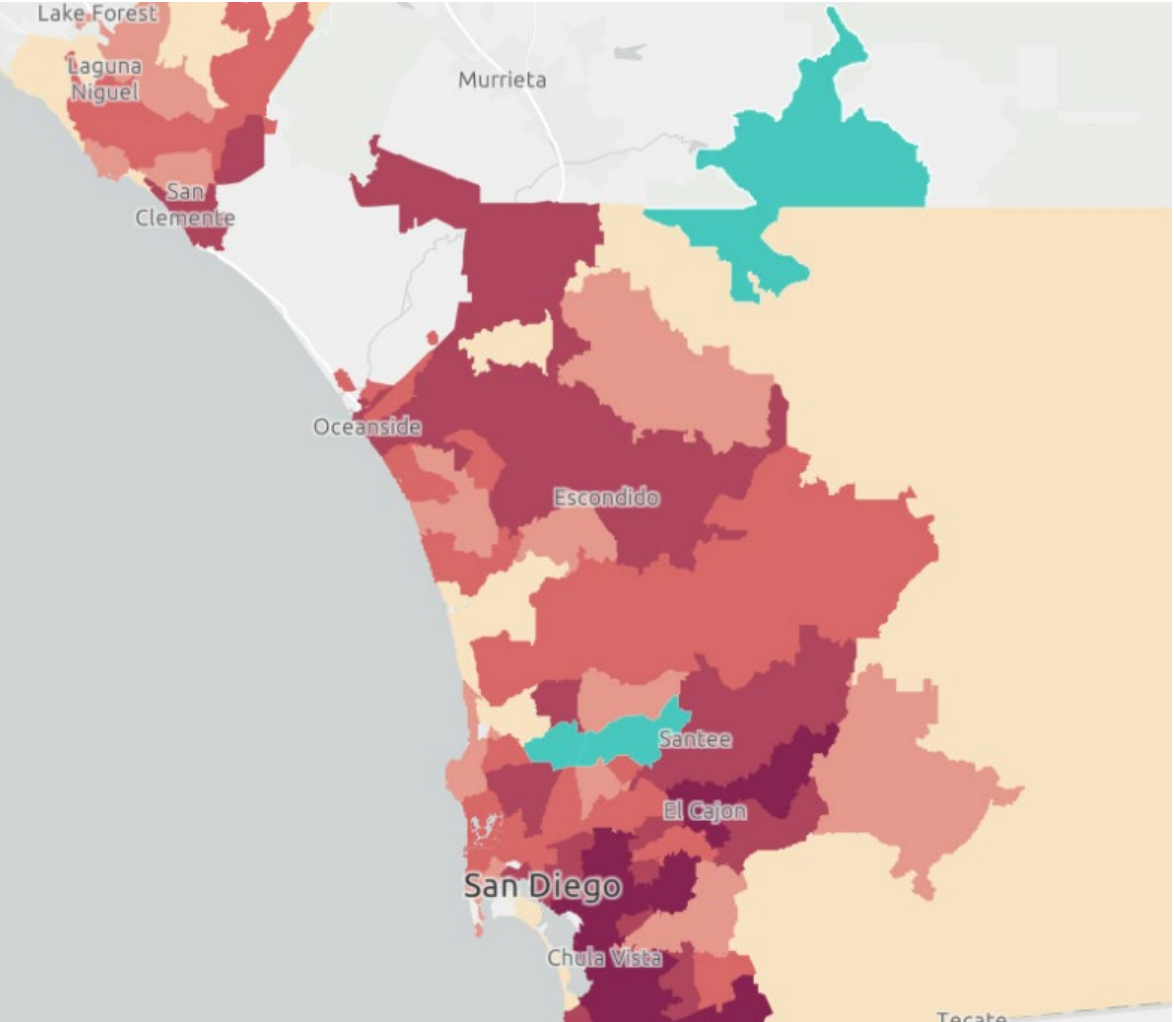
# CARE Program *SCE Enrollment map*



County	Enrollment Rate*
San Bernardino	99%
Kings	95%
Riverside	95%
Tulare	91%
Los Angeles	88%
Orange	77%
Ventura	76%
Kern	73%
Inyo	61%
Santa Barbara	53%
Mono	37%

\*Represents the enrollment rates for all SCE counties effective Apr 30, 2023 and excludes counties with less than 1,000 estimated eligible households

# CARE Program *SDG&E Enrollment Map*

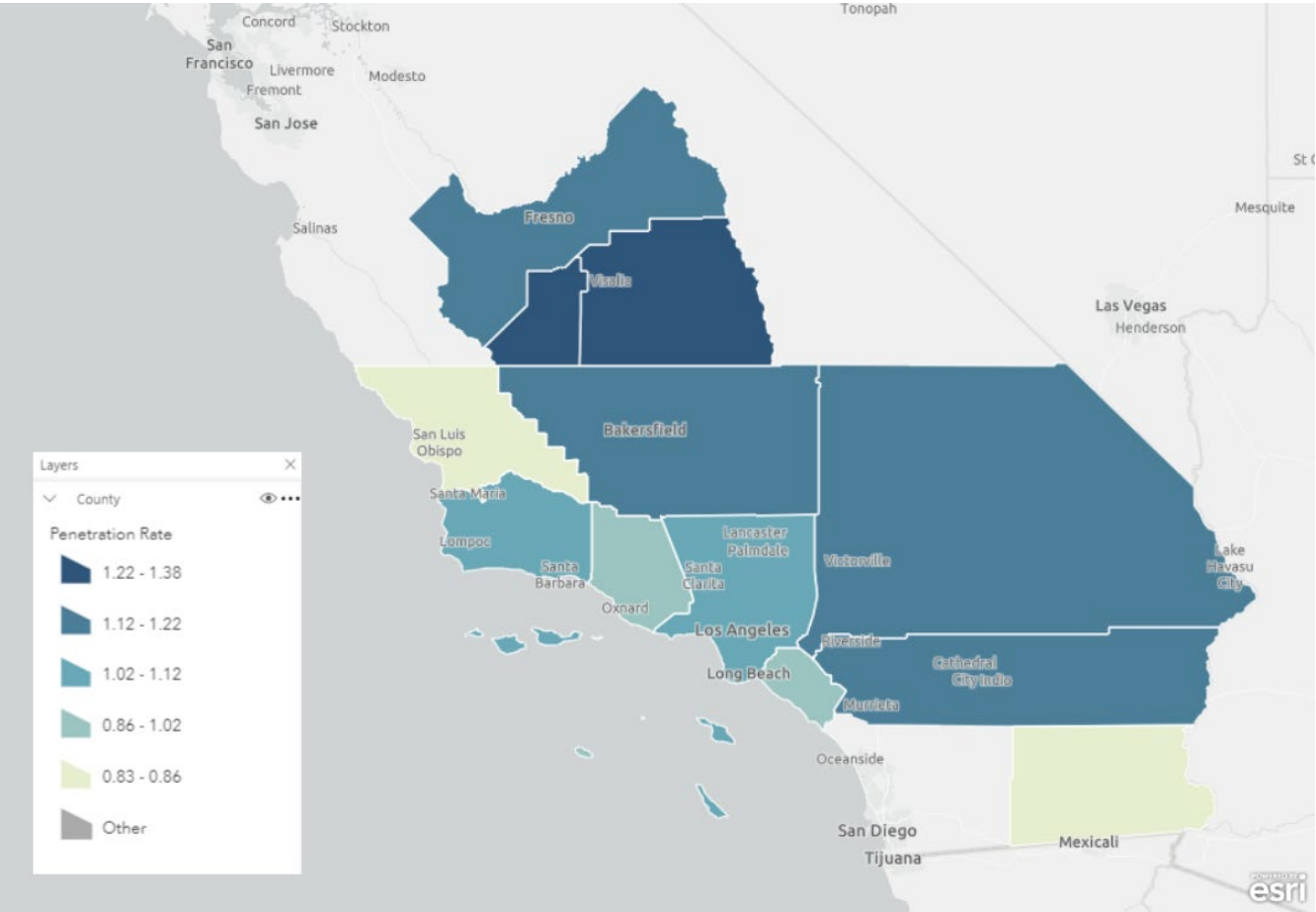


## Zip codes with lowest enrollment (overall)

City	Enrollment Rate
Miramar	9%
Rancho Santa Fe	12%
Mount Laguna	21%
Coronado	34%
Laguna Beach	38%
La Jolla	49%

\*Represents SDG&E zip codes with the lowest enrollment rates as of April 30, 2023.

# CARE Program *SoCalGas Enrollment map*



County	Enrollment Rate *
San Bernardino	140%
Kings	132%
Tulare	130%
Fresno	127%
Kern	124%
Riverside	119%
Los Angeles	106%
Ventura	105%
Santa Barbara	104%
Orange	103%
Imperial	92%
San Luis Obispo	80%

\*Represents the enrollment rates for all SoCalGas counties Jan-Apr 2023, as reported in the IOU ESA-CARE Monthly Report (Filed May 22, 2023).

# FERA Program Budgets and Enrollment

## January – April 2023 FERA Program Updates\*

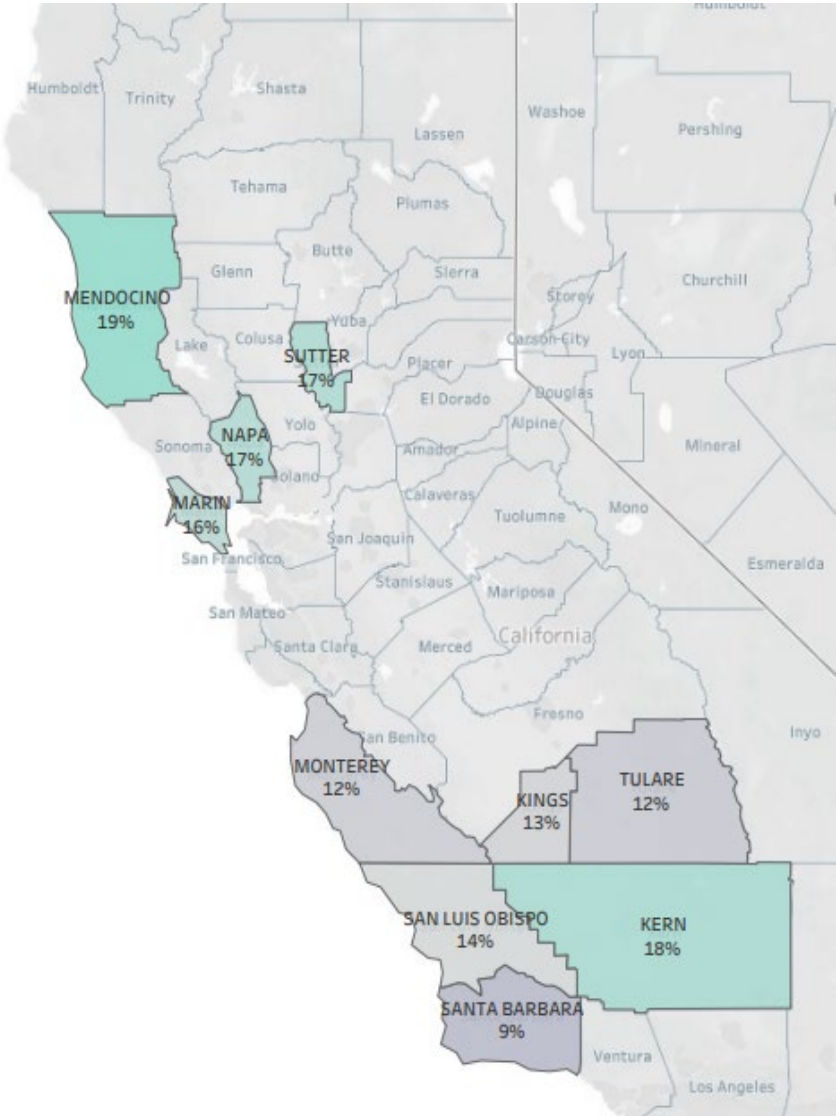
Authorized 2023 Program Budgets Expenditures				
Utility	2023 Budget	Expenditures	%	Rate Discounts
PG&E	\$2,846,400	\$732,947	26%	\$5,018,963
SCE	\$1,398,444	\$157,872	11%	\$3,065,155
SDG&E	\$612,393	\$81,628	13%	\$1,305,441
<b>Total</b>	<b>\$4,857,237</b>	<b>\$972,447</b>		<b>\$9,389,559</b>

Jan – April 2023 Enrollment						
Utility	Total Residential Electric Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled	Enrollment Rate	Newly Enrolled Customers
PG&E	4,631,472	163,489	4%	37,199	23%	4,833
SCE	4,566,423	223,982	5%	26,383	12%	3,346
SDG&E	1,395,253	42,980	3%	11,737	27%	1,014
<b>Total</b>	<b>10,593,148</b>	<b>430,451</b>		<b>75,319</b>		<b>9,193</b>

\*Authorized budgets pursuant to D.21-06-015. Jan-April 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed May 22, 2023.



# FERA Program *PG&E Enrollment Map*



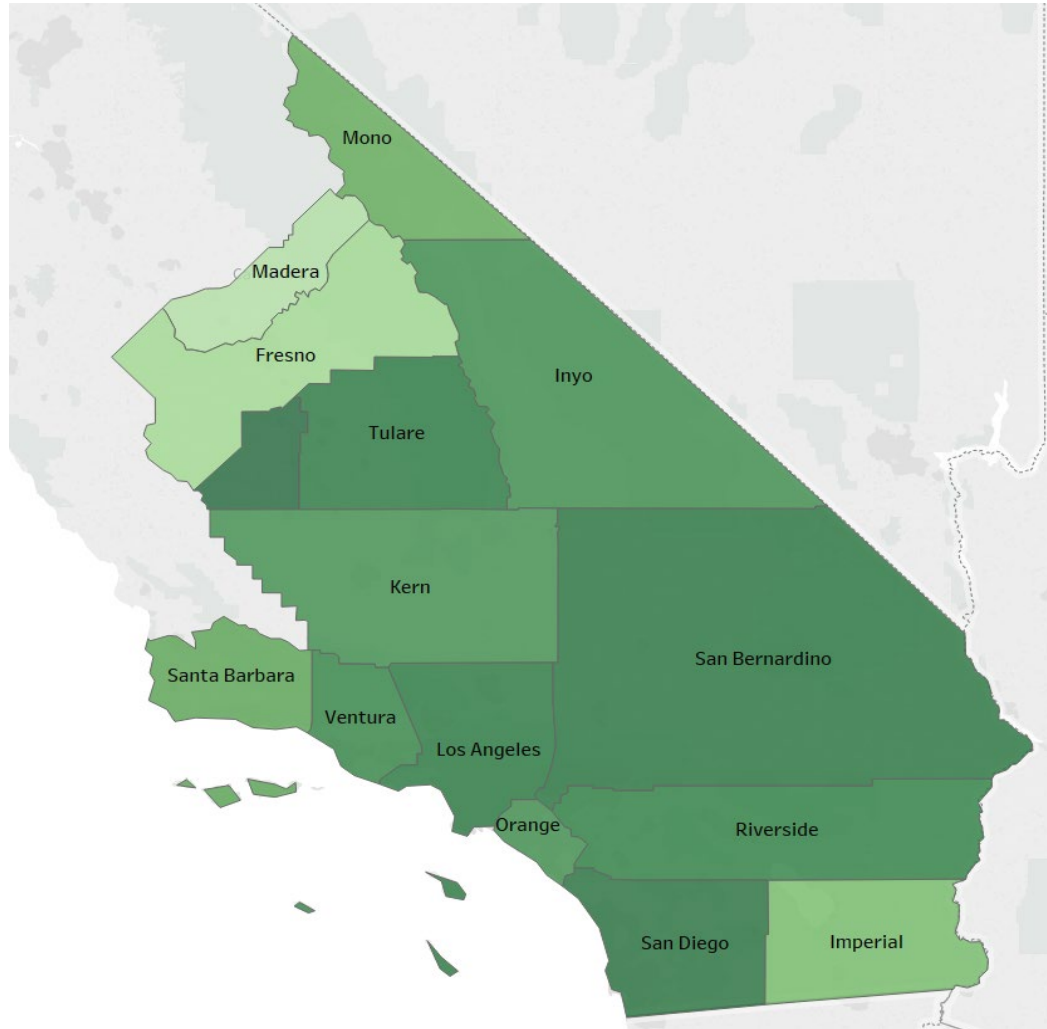
PG&E Counties With Lowest Enrollment Rates	
County	Enrollment Rate*
SANTA BARBARA	9%
TULARE	12%
MONTEREY	12%
KINGS	13%
SAN LUIS OBISPO	14%
MARIN	16%
NAPA	17%
SUTTER	17%
KERN	18%
MENDOCINO	19%

\*Represents PG&E counties with the lowest enrollment rates, as of April 30, 2023.

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



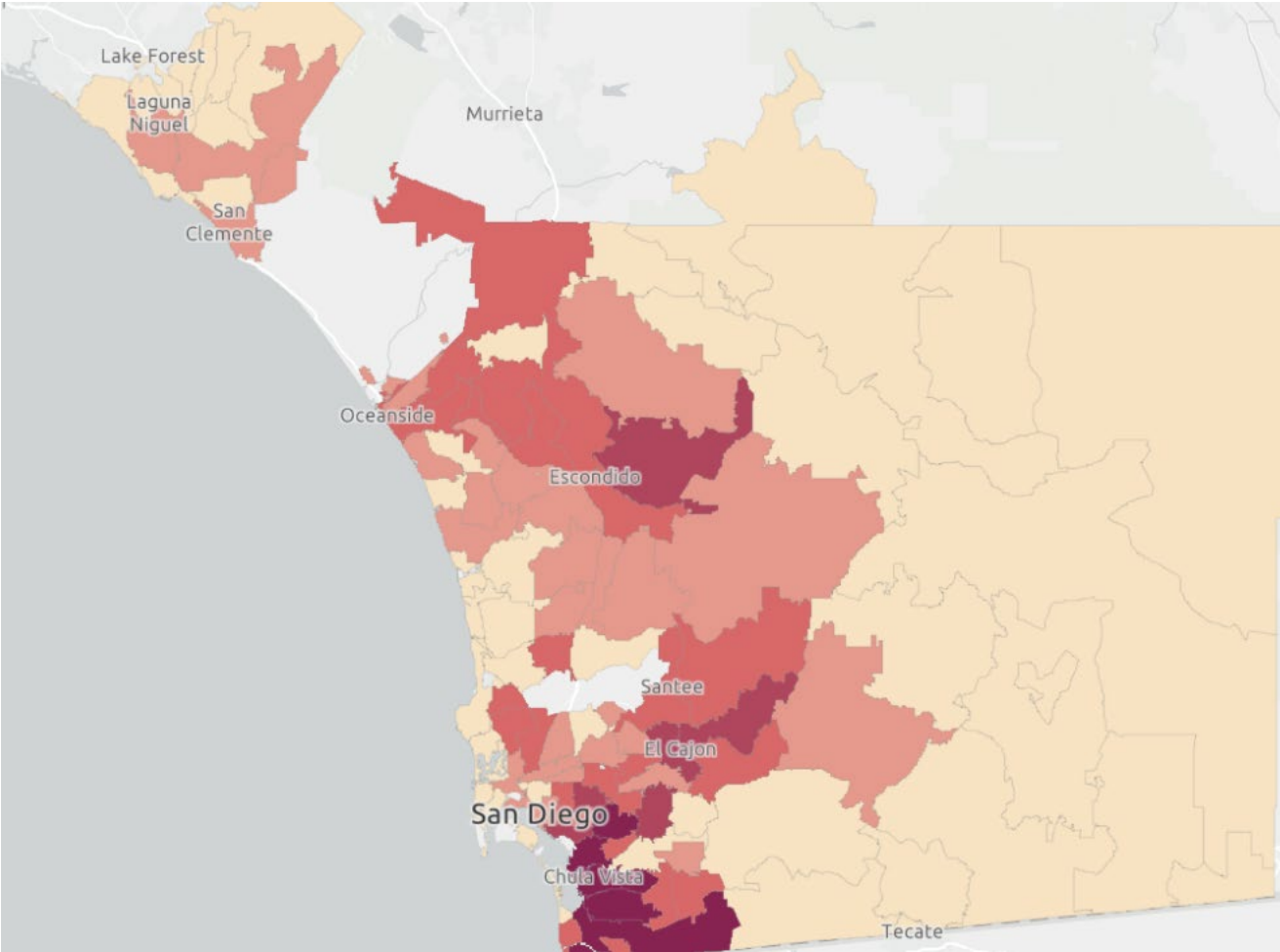
# **FERA Program** *SCE Enrollment map*



County	Enrollment Rate*
Riverside	14%
Orange	13%
Ventura	12%
Kern	12%
San Bernardino	12%
Los Angeles	11%
Tulare	10%
Kings	9%
Santa Barbara	8%

\*Represents the enrollment rates for all SCE counties effective Apr 30, 2023, and excludes counties with less than 1,000 estimated eligible households

# FERA Program *SDG&E Enrollment Map*



Zip codes with lowest enrollment (overall)	
City	Enrollment Rate
Santee	44%
Chula Vista (East)	44%
El Cajon	43%
San Diego (Southeast)	35%
Chula Vista (North)	35%
Spring Valley	34%
San Diego (South bay)	34%
San Ysidro	31%
National City	30%

\*Represents SDG&E zip codes with the lowest enrollment rates but highest eligible population as of April 30, 2023.

# Energy Savings Assistance Program Budget Update

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.

## 2023 ESA Program Budget Updates (Jan-April 2023) \*

Utility	Authorized Budget <sup>1</sup>	YTD Expenditures <sup>2,5</sup>	%
PG&E <sup>3</sup>	\$219,981,838	\$ 41,060,209	19%
SCE	\$69,127,408	\$ 6,386,355	9%
SDG&E	\$29,852,008	\$ 5,864,414	20%
SoCalGas	\$94,836,846	\$ 16,284,697	17%
<b>Total</b>	<b>\$413,798,100</b>	<b>\$ 69,595,675</b>	<b>17%</b>

\* Jan-April 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed May 22, 2023.

<sup>1</sup> Authorized budgets are the sum as shown in each IOU's ESA-CARE-FERA Monthly Report, ESA Table 1, Table 1A and/or Table 2B.

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

<sup>3</sup> ESA Pilot Plus/Deep: PG&E plans to shift approximately \$7.8M in unspent 2022 pilot funds into program years 2023, 2024 and 2025.

<sup>5</sup> Jan-April 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed May 22, 2023.



# Energy Savings Assistance Program Energy Savings Update

## 2023 Energy Savings Targets (Jan-April 2023)

2023 Annual Savings for YTD Treatment <sup>1</sup>			Estimated Annual HH Usage for HH Treated YTD <sup>2</sup>		Savings as % of Average HH Usage		Annual Program Savings Goal <sup>3</sup>	
Utility	ESA KWh	ESA Therms	kwh	therms	kwh	therms	kwh	therms
PG&E	9,453,577	445,653	143,767,008	8,044,106	7%	6%	35,773,079	1,458,655
SCE	818,569	N/A	1,348,449	N/A	61%	N/A	22,416,302	244,348
SDG&E	149,993	2,062	4,237,824	221,414	4%	0.9%	2,593,606	108,790
SoCalGas	N/A	163,985	N/A	3,802,937	N/A	4.3%	N/A	1,435,220
<b>TOTAL</b>	<b>10,422,139</b>	<b>611,700</b>	<b>149,353,281</b>	<b>12,068,458</b>			<b>60,782,987</b>	<b>3,247,013</b>

<sup>1</sup> Jan-April 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed May 22, 2023.

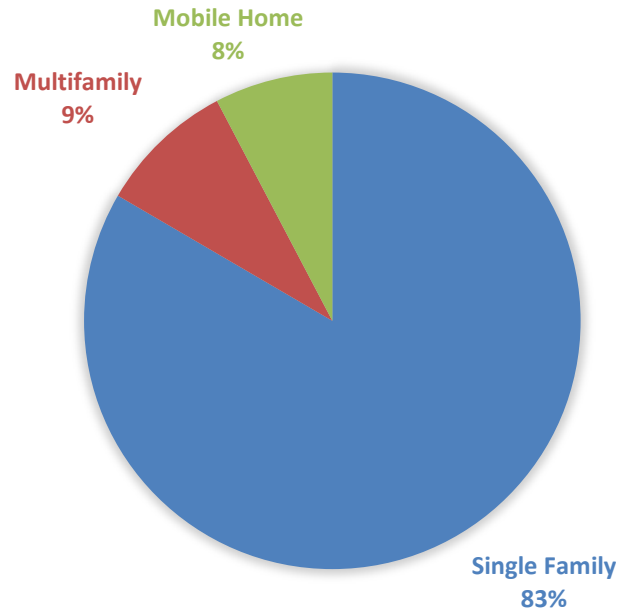
<sup>2</sup> Derived from average CARE Customers Usage for PY 2022 (Annual Report CARE Table 9) multiplied by January 1- April 2023 homes treated and annualized.

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



# Energy Savings Assistance Program – Program Participation Update

STATEWIDE PARTICIPATION  
(% TOTAL BY HOUSING TYPE)



2023 Households Treated  
(Jan-April 2023)

2023 Households Treated <sup>1</sup>				
Utility	Est. HH Treated Target	Total	Total as % of 2022 Treated	Total as % of Eligible ESA HH <sup>2</sup>
PG&E	60,437	23,771	39%	1.26%
SCE	37,871	212	1%	0.01%
SDG&E	11,711	992	8%	0.33%
SoCalGas	69,837	12,027	17%	0.51%
<b>Total</b>	<b>179,856</b>	<b>37,002</b>		

<sup>1</sup> Jan-April 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed May 22, 2023.

<sup>2</sup> As of July 1, 2022, Athens estimate of IOU residential customers estimated eligible for ESA at 250% of FPL; updated annually in February.



# Energy Savings Assistance Program Multifamily Update

## Jan-April 2023 MULTIFAMILY UPDATES

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

- **PG&E:** As of April 30, 2023, PG&E's SPOC has referred 87 multifamily customers to 30 programs including, but not limited to SMUD, CSD LIWP, 3CE, BUILD, and BayREN, and six referrals have been converted to program applications.
- **SCE:** SCE's SPOC continues to refer leads to SOMAH, leads received from SOMAH are forwarded to contractors for potential enrollment opportunities.
- **SDG&E:** SDG&E's SPOC has continued to work with ESA, ESA CAM and SOMAH implementers on leveraging leads across programs.
- **SoCalGas:** SoCalGas has completed two (2) Multifamily Common Area Measure (MF CAM) projects in 2023 and there are fifteen (15) projects in progress. SoCalGas will be completing all current projects in 2023 with the transition to the Multifamily Whole Building Program (MFWB) beginning on July 1, 2023. SoCalGas meets weekly with the other Southern IOUs and RHA to ensure a smooth transition to MFWB.

### **Common Areas: IOU CAM plans for 2023 are listed below**

- **PG&E:** As of April 2023, PG&E continued working with the program implementer on the program ramp-up activities including, but not limited to, measure specification updates, market assessment plan, data collection plan, and program database development. PG&E plans to transition in-unit treatments to Northern MFWB program in May 2023 and is currently on track to soft launch the ESA Northern MFWB program for enrollment in June 2023.
- **SCE:** As of April 30, 2023, SCE has completed 26 MF CAM projects, providing benefits to 2,074 tenant units and reported savings of 383,925 kWh. SCE currently has 6 projects in progress and will continue treating eligible properties until the launch of MFWB on July 1, 2023.
- **SDG&E:** As of April 2023, 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 4 properties, resulting in savings of 55,985 kWh and 2,232 therms.
- **SoCalGas:** As of April 30, 2023, SoCalGas has completed 2 central boiler projects. These projects have impacted 97 units, 2 buildings, and improved the health, safety, and comfort of over 115 tenants. These projects have annual therm savings of 5,974. In addition, there are currently 15 active CAM projects in various stages to be completed in 2023.

## 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 approved and implemented in 2023.

# Tribal Community Outreach Update – PG&E



Compliance/Outreach Activities as of April 2023	Successes/Challenges
<ul style="list-style-type: none"><li>PG&amp;E finalized its 2023 Outreach Grant offering to four new tribes based on proposals tribes submitted in Q1 and were informed of their grant status in April 2023. Grants ranged from \$20,000 to \$30,000.<ul style="list-style-type: none"><li>This is a 2-year grant cycle with an option to renew for a 3rd year, the primary focus will be for tribes to outreach to all tribal members, offering the ESA program, and collecting data for reasons tribal members decline to participate.</li></ul></li><li>In Q1, PG&amp;E reached out to Tribes, TANF agencies, and Tribal Housing Offices, offering a meeting to provide information on the ESA program and other PG&amp;E assistance programs.</li><li>PG&amp;E also distributed the Q1 Tribal Newsletter to all tribal entities in its service territory, which contained information related to PG&amp;E's closure of local offices, winter bill energy savings tips, the 211 Help Line, and financial assistance programs.</li></ul>	<ul style="list-style-type: none"><li>Challenges:<ul style="list-style-type: none"><li>PG&amp;E continues to see low participation in ESA from tribal communication and is working to better understand the varying needs of the tribal communities in order to increase participation.</li></ul></li><li>Successes:<ul style="list-style-type: none"><li>The 2022 Outreach Grant to the Tejon Tribe has driven requests from Tejon Tribe members to enroll in the ESA program; and the four 2023 Outreach Grant participants are beginning onboarding.</li><li>Three new tribes (not participating in the 2022/2023 Outreach Grants) have communicated their interest in learning more about PG&amp;E's assistance programs.</li></ul></li></ul>

# PG&E Tribal Community Outreach Update

Outreach Activities	Number of Participating Tribes*
Tribes completed ESA Meet & Confer	10
Tribes requested outreach materials or applications	2
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.



# PG&E Tribal Community Outreach Update



	A	B	C	D	E	F	G	H	I	J	K	L
1	<b>Energy Savings Assistance Program Table 7 - Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions *</b>											
2	<b>Pacific Gas and Electric Company</b>											
3	<b>Through April 30, 2023</b>											
4	ESA Main (SF, MH, MF in-unit)											
5	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
21	Location											
24	Tribal [20]	1,967	1	0%	1	0%	589	589	0	49	49	1,542

Note: This data currently only captures tribal households located on federally-recognized tribes whose trust lands are identified in the Bureau of Indian Affairs and information provided to PG&E by the Tribe; however, premise information from some of these tribes is not captured in this section. The data does not include ESA customers who are members of non-federally-recognized tribes or households that self-identified as Native American.

# SCE Tribal Community Outreach Update

Outreach Activities	SUCCESSES & CHALLENGES
<ul style="list-style-type: none"><li>• Ongoing Outreach:<ul style="list-style-type: none"><li>• SCE's tribal liaisons meet with all 13 tribes twice annually, discussing available programs &amp; services</li><li>• Maintained at least two tribal contacts per tribe</li></ul></li><li>• Q1 Outreach:<ul style="list-style-type: none"><li>• In March 2023, SCE Tribal liaison team participated in the TANF Family Wellness Conference with Pechanga, Morongo, and Soboba TANF organizations to promote SCE programs and encourage participants to enroll.</li><li>• During April, SCE participated in four (4) tribal Earth Day events at Pechanga, Soboba, Morongo, and Bishop Paiute, and engaged with over 600 tribal members. SCE provided information on IQPs, addressed questions about wildfire safety and mitigation efforts, and distributed resiliency kits and seedlings to tribal members, which sparked conversations about our safety and tree replanting efforts.</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Successes:<ul style="list-style-type: none"><li>• SCE secured one-on-one meetings with six (6) Tribes.</li><li>• The following five (5) Tribes have signed mini-grant agreements: Benton Paiute, Bridgeport Indian Colony, Timbisha Shoshone, Tule River Indian Tribe, and Soboba Band of Luiseño Indians.</li><li>• Receptive to accepting and distributing program information</li></ul></li><li>• Challenges:<ul style="list-style-type: none"><li>• Identifying non-federally recognized tribes</li></ul></li></ul>

# SCE Tribal Community Landscape

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

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

# SCE Tribal Segment Reporting

**Energy Savings Assistance Program Table - 7 Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions**  
Southern California Edison  
Through April 2023

ESA Main (SF, MH, MF in-unit)											
Customer Segments	# of Households Eligible <sup>[1]</sup>	# of Households Treated <sup>[2]</sup>	Enrollment Rate = (C/B)	# of Households Contacted <sup>[3]</sup>	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 (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	0	0.00%	0	0%	0	0	0	0	0	0

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.

# SDG&E Tribal Community Outreach Update

OUTREACH ACTIVITIES (in accordance with D.21-06-015)	SUCSESSES & CHALLENGES
<ul style="list-style-type: none"><li>• Tribal Relations Manager has contacted all Tribes SDG&amp;E serves to conduct listening sessions.<ul style="list-style-type: none"><li>• In 2023, has held thirteen (13) meetings.</li></ul></li><li>• SDG&amp;E held a focus group discussion May 2023.</li><li>• Mini-grant process is being revised to address the challenges with completing the financial documents.</li><li>• Continued partnerships with two Tribal CBOs:<ul style="list-style-type: none"><li>• <b>Southern California Tribal Chairmen's Association (SCTCA)</b><ul style="list-style-type: none"><li>• Total Outreach Activities YTD: 9</li><li>• Total Reach: 4,855</li></ul></li><li>• <b>Southern California American Indian Resource Center (SCAIR)</b><ul style="list-style-type: none"><li>• Total Outreach Activities YTD:27</li><li>• Total Reach: 17,815</li></ul></li></ul></li></ul>	<ul style="list-style-type: none"><li>• <b>Success:</b> SDG&amp;E continues to be proactive in promoting low-income programs to Tribes willing to meet and confer.</li><li>• <b>Success:</b> Through ongoing CBO partnerships, SDG&amp;E staff has been invited to participate in SCAIR and SCTCA outreach events to promote CARE, FERA, ESA.</li><li>• <b>Success:</b> Tribes that SDG&amp;E has met with have had positive feedback regarding SDG&amp;E's outreach and engagement efforts.</li><li>• <b>Challenge:</b> Engaging non-federally recognized tribes.</li><li>• <b>Challenge:</b> Tribes are overwhelmed with requests and have limited resources, so they don't always respond.</li><li>• <b>Challenge:</b> Mini-grants require Tribes to complete tax paperwork before payment can be issued.</li></ul>

# SDG&E Tribal Community Landscape

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

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

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

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

# SDG&E Tribal Segment Reporting

Energy Savings Assistance Program Table - 7 Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions  
San Diego Gas & Electric  
April 2023

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 Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Energy 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
Demographic											
Tribal	21,716	4	0%	651	1%	154	154	0	(0)	(0)	505

# SoCalGas Tribal Community Outreach Update

Outreach Activities	SUCSESSES & CHALLENGES
<p>The activities are in accordance to D.21-06-015.</p> <ul style="list-style-type: none"><li>• SoCalGas maintains communication with Tribes serviced by SoCalGas.<ul style="list-style-type: none"><li>• SoCalGas reaches out to federally-recognized and non-federally recognized Tribes in its service territory via in person meetings, emails, phone calls and at community events</li><li>• SoCalGas is continuing to build relationships with Tribes and establishing and/or maintaining a Tribal contact for each Tribe in its service territory</li></ul></li><li>• SoCalGas is enhancing its outreach strategy to help navigate and increase engagement within tribal communities.<ul style="list-style-type: none"><li>• Through April 30, SoCalGas has met with 10 tribes in service territory and established a point of contact for Low Income decision programs.</li></ul></li></ul>	<ul style="list-style-type: none"><li>• <b>Success:</b> Continuing to work with Community Based Organizations specific to Tribal communities to assist in providing information on programs to the community through their organization and at Tribal events such as Pow Wows</li><li>• <b>Success:</b> Participated in Pechanga Pow-Wow, Indian Gaming Tradeshow Convention, Soboba Earth Day Event</li><li>• <b>Working with Success:</b> Two SoCalGas Memos of Understandings have been established</li><li>• <b>Challenge:</b> 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</li><li>• <b>Challenge:</b> Identifying non-federally recognized tribes</li></ul>



# SoCalGas Tribal Community Landscape

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

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

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

# SoCalGas Tribal Segment Reporting

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

Southern California Gas Company

April 2023

ESA Main (SF, MH, MF in-unit)											
Customer Segments	# of Households Eligible* [1]	# of Households Treated [17]	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
Location											
Tribal [8]	35	3	9%	55	5.5%				(0.5)	11.6	\$ 271

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.

# PSPS Ongoing Activities



# Differences Between Safety Settings and PSPS

## Enhanced Powerline Safety Settings

Turning off power automatically within one-tenth of a second if a problem is detected on the line



### WHEN

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

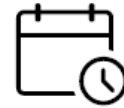


### NOTIFICATIONS

Regular updates after the outage occurs; advance notice cannot be provided due to the adjusted settings that allow power to automatically shut off

## Public Safety Power Shutoffs (PSPS)

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



### WHEN

During times of high winds, low humidity and dry vegetation



### NOTIFICATIONS

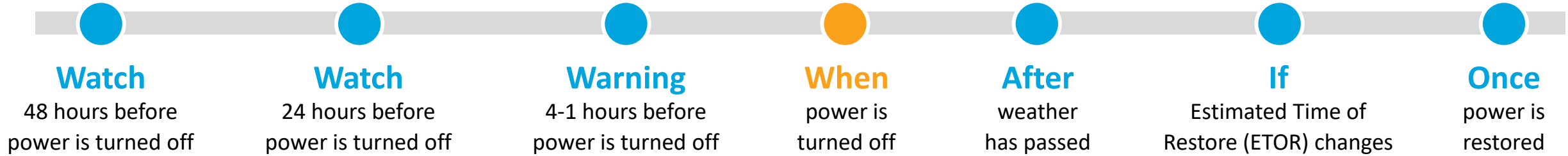
In advance through automated calls, texts, and emails with updates provided daily until power is restored



Find updates and information for both planned and unplanned outages at [pge.com/outages](https://www.pge.com/outages)

# How Are Customers Notified for a PSPS?




## When We'll Notify



### How We'll Notify

**Automated calls, texts and emails (available in sixteen languages).**

We will also use pge.com, social media and will inform local news and radio.

 @pacificgasandelectric
  @PGE4Me  
 @pacificgasandelectric

### How To Receive Notifications For Any Address

Anyone can sign up for **address alerts** to receive PSPS notifications for any location, such as their work or child's school.




Enroll at: [pge.com/addressalerts](https://pge.com/addressalerts)

*Annual registration is required.*

# Additional Backup Power Support for Customers

## Generator and Battery Rebate Program

Rebates are available for eligible customers with purchase of a qualified portable generator or battery.

 [pge.com/backuppowers](https://pge.com/backuppowers)

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## Backup Power Transfer Meter Program

Free program helps eligible customers safely connect generator power to their homes during emergency outages.

 [pge.com/transfermeter](https://pge.com/transfermeter)

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## Self-Generation Incentive Program

Rebates offered to help you save on battery storage systems for your home and business and prepare in the event of a power outage.

 [pge.com/sgip](https://pge.com/sgip)

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## Fixed Power Solutions

Permanent, long-term backup power solutions are offered for the most impacted customers.

 [pge.com/residentialstorageinitiative](https://pge.com/residentialstorageinitiative)





# 2023 SCE PSPS OVERVIEW

January -  
April 2023

Statistics	Activations	Customer Interruptions	Circuit Interruptions	Customer Minutes of Interruption
2023 Fire Season	0	0	0	0



# MITIGATING IMPACTS OF PSPS -SCE

## Customer Care Programs

### 2023 COMMUNITY CARE RESOURCES

#### 65 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 eligible customers with a free portable back-up battery and solar panel to power medical devices during a PSPS event. Expanded program in September 2022 to reach additional customers. Since program inception, close to 12k 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)

### 2023 ACHIEVEMENTS

- \*New CRC Enhancements, including testing of Starlink satellite communication device in remote communities
- \*Refresh of [www.PrepareForPowerDown.com](http://www.PrepareForPowerDown.com) complete and available for public use
- Conclusion of Access & Functional Needs (AFN) Self-Identification Pilot with ~20% response rate
- Deployed 11,887 free portable backup batteries since program inception (CCBB)
- Provided 1,099 Portable Power Station Rebates
- Provided 256 Portable Generator Rebates
- 100% of claims submitted have been paid within the 30-day Target



# SDG&E PSPS Support Services

*Support for customers with access and functional needs or households dependent on uninterrupted power during PSPS events*

- 11 facilities in the HFTD
- Provide a local center for impacted customers to receive support and resiliency items. Video Remote Interpreting in language and ASL

Community  
Resource Centers



- Partnering with Southern Indian Health Council (SIHC) & Indian Health Council (IHC)
- Provide resiliency items, and other needs to tribal communities

Tribal  
Communities



- Partnerships with 211 San Diego/211 Orange County
- Connect customers to resources and direct support from 1,000+ orgs, 24/7/365, over 200 languages

Centralized  
Resource Hub



- Partner with SD Food Bank & Feeding SD to provide mobile food pantries at rural, tribal and PSPS sites
- Adding Terra Bistro for warm food support at CRCs as needed

Pantry & Warm  
Food



- Partnership with FACT paratransit
- Provides accessible transportation to customers' location of choice including CRCs

Transportation



- Partnership with Salvation Army
- Provides no-cost hotel stays if staying in place is not an option. (SDG&E may provide an emergency battery)

Hotel Stays



- Partnerships with local CERTS and YANA
- Provide wellness checks to individuals with AFN who may need additional support

Wellness Checks



- ~50 CBOs within SDG&E's Energy Solutions Partner Network
- Amplified PSPS notifications (including ASL) to reach AFN customers in HFTD

CBO Engagement



# SDG&E AFN Enhancements

*New and continued enhancements to support individuals with Access & Functional Needs*



## Data + Automation

Implemented AFN Self-ID Webform. Adding 2 new identifiers to expand awareness of AFN population.



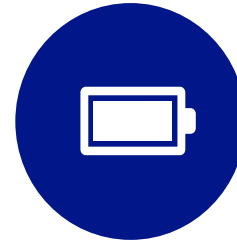
## Marketing + Outreach

PSPS preparedness & support services direct mail campaigns. New AFN partnerships reaching veterans.



## Accessibility

Video Remote Interpreting (VRI) available for Branch Offices, CRCs and Customer Service Field Staff. Dedicated SDGE.com accessibility portal and email.



## Generators

No cost Portable Power Station for qualifying individuals of MBL & AFN. Rebates from \$150 to \$600 available.



# SoCalGas Post-Moratorium Extension

## Continued Customer Support



- [socalgas.com/Coronavirus](https://socalgas.com/Coronavirus) continues to be updated, providing customers with a reference hub as new programs and payment plan assistance may become available.
- Residential credit collections processes anticipated to resume in Q3 2023.
- Additional updates will be made as needed.



# Joint IOUs Unspent Funds for Energy Savings Assistance Program

# PG&E's Unspent ESA Program Funds



Total Remaining Unspent Funds (\$ in millions)	
Remaining unspent funds as of December 31, 2022 <sup>[1]</sup>	\$32.51
Unspent & uncommitted funds used to offset 2023 budget revenue requirement	- \$0
2023 Revenues Collected (Jan - Apr)	+ \$57.41
2023 Expenses (Jan - Apr)	- \$41.06
2023 Accrued Interest (Jan - Apr)	<u>+ \$0.68</u>
Total remaining unspent funds as of April 30, 2023	\$49.54

1. Committed unspent fund carry forward to 2023 according to fund shifting rules for MF CAM, SPOC, Pilots, Studies, and Pilot Plus and Pilot Deep activities.

# SCE's Unspent Funds for ESA Program

Total Remaining Unspent Funds (\$M)	
Unspent Funds through 12/31/22 [1]	\$ 25.48
2023 Revenue Collected (Jan – Dec)	\$ 20.38
2023 Expenses from (Jan – Dec)	\$ (2.52)
2023 Accrued Interest (Jan-Dec)	\$ 0.55
<b>Total Unspent Funds through 4/30/2023</b>	<b>\$ 43.89</b>

1. This is the remaining Unspent Funds amount from 2009-2022 program cycles through December 31, 2022.

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

# SDG&E's Unspent Funds for ESA Program

Total Remaining Unspent Funds (\$ in millions) [1]	
Remaining unspent funds as of December 31, 2022 [2]	\$20.66
Remaining unspent & uncommitted funds used to offset 2023 revenue requirement [3]	- \$1.33
Revenues collected through YTD April 2023	+ \$4.89
Expenses incurred through YTD April 2023 [4]	- \$7.47
Total remaining unspent funds as of April 31, 2023 [5]	= \$16.75
Total remaining ESA CAM committed funds as of April 30, 2023	- \$1.96
Total remaining unspent & uncommitted funds as of April 30, 2023 [5]	= \$14.79
1. Unspent funds are only available for ESA activities.	
2. As reported in the 2022 Annual Report, the remaining unspent funds as of December 31, 2022 of \$20.66M includes \$2.81M for ESA CAM (Table 1A). 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 \$2M in unspent and uncommitted LIEEBA and PGLIEEBA funds to offset the 2023 authorized funding in the 2023 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.	



# SoCalGas Unspent/Uncommitted funds for ESA



## 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
<b>Total Remaining Unspent Funds through PY 2020 [1]</b>	<b>\$222.22</b>
2021 – 2022 Revenues Collected	\$9.12
2021 – 2022 Total Expenses [2]	\$220.03
<b>Total Remaining Unspent Funds through PY 2022 [1]</b>	<b>\$11.31</b>
2023 Revenues Collected	\$37.37
2023 Total Expenses [3]	\$16.82
<b>Total Remaining Unspent Funds as of 4/30/2023 [1]</b>	<b>\$31.86</b>
<u>Footnotes</u>	
[1] Unspent Funds related to Revenues Collected	
[2] Total Expenses from Annual Reports	
[3] Total Expenses from April 2023's Monthly Report - Summary Table	
Notes:	
- Unspent funds can only be used for ESA Program activities or returned to ratepayers.	





# State of Disconnections and Arrearage Management Plans (AMP)

# PG&E Arrearage Management Plan (AMP)

## Arrearage Management Plan (AMP)

- Number of customers enrolled: 248,338
  - Total new enrollments in Q1 2023: 31
  - Gross percentage of eligible households enrolled: 72%
  - Number successfully completed 12-month enrollment since program launched in Feb. 2021: 24K
  - Number of customers unenrolled due to receipt of CAPP funding in 2023: 3K
  - Total amount forgiven since program launch : \$117M

\*Data as of 3/31/23

## AMP Case Management

### AMP Enrollments Q1 2023

- AMP eligible outreach campaign conducted in Q4 of 2022.
  - Postcards via direct mail sent to 40K eligible customers
  - Emails sent to 80k eligible customers
- Additional outreach effort, along with resuming collection activities, likely attributed to strong enrollment numbers in Q1 2023.

# SCE Disconnections Status and AMPs

## Arrearage Management Plan (AMP)\*

- Number of customers enrolled: 95,546
  - Percentage of eligible households enrolled: 10%
  - Number successfully completed 12-month program launched in Feb. 2021: 5,277
- Total arrearages: \$56M
- Total amount forgiven: \$31M

## Disconnections

Number of residential disconnections 2022: 135

Resumption of residential credit collection efforts started in Q3 2022. 131 Residential Customers reconnected.

## 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)

- 2023 (YTD)\* – 147 calls completed



### AMP Delayed Billing outreach

- 2023 (YTD)\* - 1,427 letters mailed



# SDG&E Disconnections & AMP Status

## Arrearage Management Plan (AMP)\*

- Number of customers enrolled: 11,660
- Percentage of eligible households enrolled: 26%
- Number of customers successfully completed
  - 12-month program: 4,933
- Total arrearages actively enrolled in AMP: \$13.1 M
- Total amount forgiven: \$17.7M

## Disconnections

Number of disconnections, CY 2021 – April 2023\*:  
Zero

Residential disconnection efforts expected to begin  
~Q3 2023.

## AMP Marketing

### Targeted Communications

- Included AMP messaging in
  - CARE-eligible monthly bill comparison email

### General Outreach

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

## Neighbor-to-Neighbor\*

Number of customers receiving N2N funds: 1,100

Total Amount Spent: \$536,071

\*Jan- April 2023

\*\* SDG&E shareholder funded utility assistance program

# SoCalGas Disconnections Status and AMPs



## Arrearage Management Plan (AMP)\*

- Number of customers enrolled: 149,863
  - Percentage of eligible households enrolled: 25.8%
  - Number successfully completed 12-month program launched in Feb. 2021: 29,809
- Total arrearages: \$94.9M
- Total amount forgiven: \$26.1M

\*Data as of 04/30/23, pulled on 05/31/2023

## Disconnections

Number of disconnections, Jan 2021 – April 30, 2023\*:  
Zero

Resumption of residential credit collection efforts  
expected to begin ~Q3 2023.

\*Updated 5/31/2023

## AMP Case Management

SoCalGas Residential Collections anticipated to resume in  
Q3 2023

We continue to explore options that will lead to customer  
success in AMP:

- Implementing a text and email campaign for customers  
with missed payments
- Launching additional enrollment campaigns to  
promote programs that address the affordability of  
monthly bill amounts, potentially increasing AMP on  
time payment success

\*Updated 5/31/2023



# ESA and Demand Response

# ESA - Demand Response 5-Year Recap

The table below conveys ESA customers who received smart thermostats and opted into Smart AC Demand Response (DR) program.

	2019	2020	2021	2022	YTD 2023*
<b>SCE</b> For additional DR program information, please visit: <a href="https://www.sce.com/demand-response-programs-for-homes">Demand Response Programs for Homes (sce.com)</a>	463	218	294	285	31
<b>SDG&amp;E</b> <sup>[1]</sup> For additional DR program information, please visit: <a href="https://www.sdge.com/demand-response-for-your-home">Demand Response for Your Home (sdge.com)</a>	4	5	30	8	1
<b>PG&amp;E</b> For additional DR program information, please visit: <a href="https://www.pge.com/energy-incentive-programs">Energy incentive programs (pge.com)</a>	14	360	514	1,168 <sup>[2]</sup>	264 (thru Q1 2023)

\*January – April 2023

<sup>[1]</sup> Based on current data. Actual opt-in may have occurred in subsequent year.

<sup>[2]</sup> Based on best approximation of data as of June 2023, and is dependent on customer opt-in/opt-out and is subject to change.

# Summer Reliability Readiness by IOU

	PG&E	SCE	SDG&E
ESA Resources for Summer Reliability for PY 2022 and 2023	No dedicated budget set aside; measure offerings take into consideration climate zones/usage	No dedicated budget set aside	No dedicated budget set aside.
# Smart Thermostats Provided to ESA HHS	5,559 (As of April 2023)	932 (Jan 1 – April 2023) through Smart Energy Program. An addition 132 from ESA Program.	Through April 2023, SDG&E has installed 693 smart thermostats in customer homes.
Summer Reliability Programs available to CARE, FERA and/or ESA Customers	<p><b>Power Saver Rewards</b></p> <ul style="list-style-type: none"> <li>Approx. 1.2 million CARE/FERA customers in Power Saver Rewards (Approx.1.7 millions total participants)</li> <li>Funded through 2023; authorized through 2025</li> </ul> <p><b>Bring Your Own Thermostat (BYOT) Pilot</b></p> <ul style="list-style-type: none"> <li>ESA/BYOT dual enrollment: 264 in Q1 2023; &gt; 2000 (2019 – April 2023)</li> <li>Funded through 2023</li> </ul>	<p><b>Power Saver Rewards</b></p> <ul style="list-style-type: none"> <li>Approx. 1.1M CARE/FERA customers in Power Savers Rewards (Approx. 1.9M total participants)</li> <li>Funded through 2023</li> </ul> <p><b>Summer Discount Plan (SDP)</b> – Bill credit for AC cycling during peak events open to ESA, CARE, and FERA customers</p> <p><b>Smart Energy Program (SEP)</b> – Bill credit for remote smart thermostat temperature adjustments (4 degrees) open to ESA, CARE, and FERA customers</p>	<p><b>Power Saver Rewards</b></p> <ul style="list-style-type: none"> <li>Approx. 230K CARE/FERA customers in Power Savers Rewards (Approx. 583K total participants)</li> <li>Pilot approved through 2025, but only funded through 2023</li> </ul> <p><b>AC Saver (Summer Saver)</b></p> <ul style="list-style-type: none"> <li>Bill credit for AC cycling during peak events open to ESA, CARE, and FERA customers</li> </ul> <p><b>AC Saver (Thermostat Program)</b></p> <p>Enrollment incentive and bill credit for remote smart thermostat temperature adjustments (4 degrees) open to ESA, CARE, and FERA customers</p>
Other Considerations / Cross Program Coordination / Challenges	<ul style="list-style-type: none"> <li>For additional DR program information, please visit <a href="https://www.pge.com/energy_incentive_programs">Energy incentive programs (pge.com)</a></li> <li>ESA contractors leave collaterals to encourage BYOT participation; BYOT also conducts targeted outreach to ESA customers</li> <li>Fundings for SR programs mentioned above are through 2023 only</li> </ul>	<ul style="list-style-type: none"> <li>More information at: <a href="https://www.sce.com/demand_response_programs_for_homes">Demand Response Programs for Homes (sce.com)</a></li> <li>SCE currently utilizing 28 CBO's to provide ME&amp;O in their respective communities, mostly in lower income areas</li> <li>Demand Response programs in a 2023 bridge year; expect a year-end decision on PY 2024-27 regarding continued funding</li> </ul>	<ul style="list-style-type: none"> <li>More information at: <a href="https://www.sdge.com/demand_response_for_your_home">Demand Response for Your Home (sdge.com)</a></li> <li>SDGE currently leveraging CBOs within its Energy Solutions Partner Network to provide ME&amp;O in their respective communities, mostly in lower income areas</li> <li>Demand Response programs in a 2023 bridge year; expect a year-end decision on PY 2024-27 regarding continued funding.</li> </ul>