BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA

Application of Pacific Gas and Electric Company for Approval of Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets for 2021-2026 Program Years. (U 39 M)	Application No. 19-11-003 (Filed November 4, 2019)
And Related Matters.	Application No. 19-11-004 Application No. 19-11-005 Application No. 19-11-006 Application No. 19-11-007

ANNUAL REPORT OF PACIFIC GAS AND ELECTRIC COMPANY (U 39 M) ON THE RESULTS OF ITS ENERGY SAVINGS ASSISTANCE, CALIFORNIA ALTERNATE RATES FOR ENERGY AND FAMILY ELECTRIC RATE ASSISTANCE PROGRAMS

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Dated: April 28, 2023

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In accordance with Decisions (D.) 12-08-044, 16-11-022, and 21-06-015 and the annual reporting directives contained therein, Pacific Gas and Electric Company (PG&E) files this Annual Report on the results of its Energy Savings Assistance (ESA), California Alternative Rates for Energy (CARE), and Family Electric Rate Assistance (FERA) program efforts for the 2022 program year. PG&E is filing and serving this annual report in Application (A.) 19-11-003, et al. PG&E also notes that starting with this 2022 annual report, PG&E includes its annual reporting for its FERA program.[1/]

1/ D.21-06-015, p. 521, Ordering Paragraph 185.

Respectfully Submitted,

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Dated: April 28, 2023

Pacific Gas and Electric Company®

ENERGY SAVINGS ASSISTANCE (ESA), CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) AND FAMILY ELECTRIC RATE ASSISTANCE (FERA) PROGRAMS

2022 ANNUAL REPORT

April 28, 2023





ESA, CARE AND FERA PROGRAMS
2022 ANNUAL REPORT
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2022 Energy Savings Assistance, California Alternate Rates for Energy and Family Energy Rate Assistance Programs Executive Summary

Pacific Gas and Electric Company (PG&E or Company) is pleased to submit its Energy Savings Assistance (ESA), California Alternative Rates for Energy (CARE) and Family Electric Rate Assistance (FERA) programs' annual report[1] to the California Public Utilities Commission (CPUC or Commission) for the reporting period January 1, 2022, through December 31, 2022.

ESA, CARE, and FERA are long-standing programs in PG&E's service territory that are designed to deliver benefits to income-qualified households. ESA provides both homeowners and renters residing in all types of housing with no-cost weatherization, energy efficient appliances and energy education, assisting them in increasing the health, safety, and comfort of their home along with reducing their energy use and associated expenses. CARE and FERA offer a bill discount on gas and/or electricity for qualifying households, thereby reducing the energy burden for households most impacted by energy costs.

[1] In compliance with CPUC Decision (D.) 16-11-002 as modified by D.17-12-009, and as directed by D.21-06-015.

1. Energy Savings Assistance (ESA) Program Executive Summary

2022 Energy Savings Assistance (ESA) Program | Summary of Results and Program Highlights

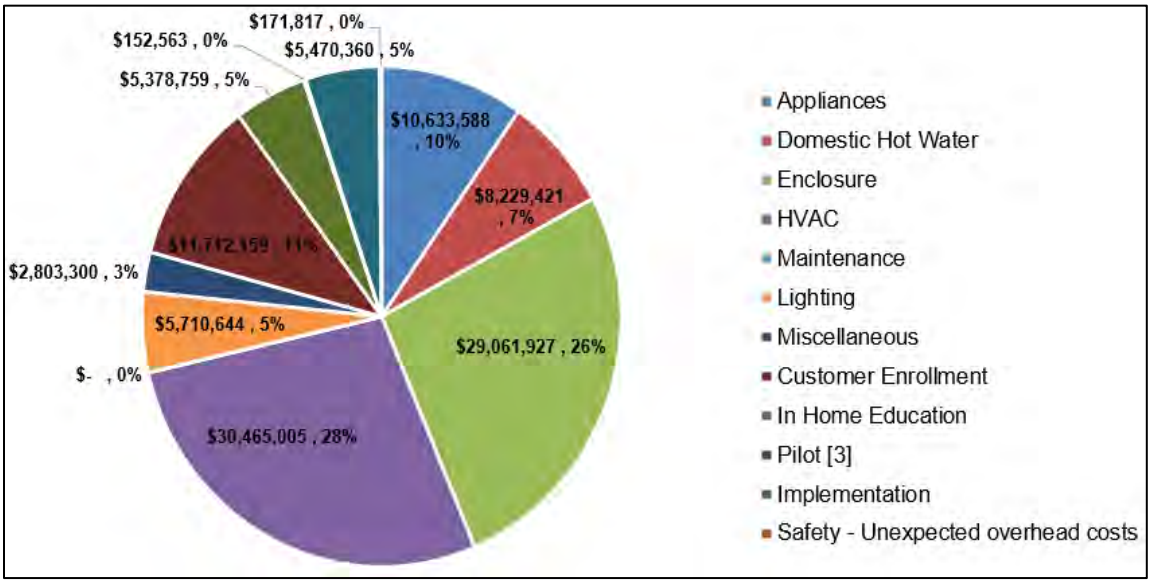
PG&E's 2022 ESA Main (single-family, mobile homes, and multifamily in-unit) program provided 67,567 homes with energy efficiency (EE) and health, comfort, and safety improvements. The ESA Main program's installed measures and associated reduced energy use in 2022 was 24,601,916 kWh saved and 1,165,638 therms saved – the equivalent offset of an estimated 26,017 tons of greenhouse gas (GHG) emissions. In addition to energy use reduction, each household treated by the ESA Main program also received an estimated average lifetime bill savings benefits of $863.

In addition, the ESA Multifamily Common Area Measures (MF CAM) program (part of the ESA portfolio serving multifamily properties) treated 45 properties, exceeding the 2022 goal of 33 properties by 136%. PG&E worked to sunset the ESA CAM program in 2022 and prepare for the launch of the Northern Multifamily Whole Building (MFWB) program planned for 2023.

In June 2022, after completing a competitive solicitation for a program implementer, PG&E launched its ESA Pilot Plus/Pilot Deep (PP/PD) pilot programs, and began outreach, site assessments, and home treatments in the second half of the year.

ESA Program Summary Table 1 provides a summary of Program Year (PY) 2022 ESA program EE expenditures by measure group. Additional details on PG&E's ESA program, including ESA Main, MF CAM, Northern MFWB, and PP/PD are included in Section 1.1.1 of this report.

ESA Program Summary Table 1
ESA Program EE Expenditures by Measure Group



PG&E's primary activities and new initiatives in 2022 for ESA centered around implementing the ESA program elements and pilots contemplated in D.21-06-015, orchestrating solicitations for new ESA program implementers, sunsetting ESA CAM while developing MFWB, and launching the PP/PD pilot programs.

The ESA program's noteworthy marketing, outreach, and administrative achievements in 2022 included:

- Implementing new program design while maintaining contractor workforce and exceeding overall annual energy savings and homes treated goals.
- Establishing data-driven targeting and segmentation to support customer need-states and shift the program to a focus on energy savings.
- Successfully completing multiple solicitations' Request for Proposals (RFP) with lessons learned primarily related to the challenges of concurrent simultaneous solicitations.
- Implementing the income guidelines change from 200% Federal Poverty Level (FPL) to 250% FPL pursuant to Senate Bill (SB) 756 authored by San Diego Senator Ben Hueso and effective July 1, 2022.
- Supporting an ESA financial audit by the CPUC of 2019 - 2021 program cycle unspent funds.
- Modifying approach to ESA Tribal Outreach Grants, in response to tribal input, to set up a pathway for increased success in 2023.
- Conducting pre-launch activities for the MFWB program set to commence in 2023.
- Developing and launching the Multifamily Central Portal to provide market data and assessments to a broad group of stakeholders.
- Implementing the new PP/PD pilot programs and completing the first home assessments.
- Using the ESA Working Group's (WG) measure modification protocol to modify measures and better optimize the ESA portfolio with stakeholder engagement and approval.

ESA Program Activities Supporting Environmental and Social Justice (ESJ)

Initially approved February 21, 2019, and updated in a 2.0 version in 2022, the Commission's Environmental and Social Justice (ESJ) Action Plan[2] provides a roadmap and directive for utility programs to prioritize and improve services to residents of Disadvantaged Communities (DAC), tribes, communities of color and low-income communities. In 2022, PG&E's ESA program incorporated and advanced the goals of the ESJ Action Plan in multiple ways, including:

- Developing WGs and Sub-working groups (SWG) in the ESA WG to provide an opportunity for community voices and perspectives to be considered.

[2] CPUC Environmental and Social Justice Action Plan (February 21, 2019) Retrievable at https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M263/K673/263673090.pdf; 2.0 version released March 2022. Retrievable at https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M465/K846/465846599.pdf

- Prioritizing tribal participation in ESA and revamping the Tribal Outreach Grant program in response to tribal input, such as by increasing the grant amount and timeline.
- Utilizing the annual public meeting as a forum to engage broad stakeholders on program outcomes, planning, and improvement opportunities.
- Prioritizing customer segments and improving data collection to better report impact and outcomes, such as for vulnerable communities, households with high energy burden DACs, CARB communities, etc.
- Tracking and reporting on DAC residents in ESA workforce.
- Designing the PP/PD programs to reach DACs and areas of high need in the Central Valley.

Procedural Background

The PG&E ESA program uses a prescriptive, direct install approach to provide free home weatherization, EE appliances and energy education to income-qualified customers throughout PG&E's service area. PG&E customers living in single-family (SF), multifamily (MF), and mobile homes (MH), including homeowners and renters, are eligible to participate.[3]

1.1. Energy Savings Assistance (ESA) Program Overview

1.1.1. Provide a summary of the ESA program elements as approved in D.21-06-015.

Decision (D.) 21-06-015 (approved June 3, 2021) authorized a new ESA, CARE, and FERA program funding cycle beginning July 1, 2021 through December 31, 2026. PG&E's overall budget is approximately $972.06 million (M) for ESA (including ESA Main, MFWB, and PP/PD programs). D.21-06-015 also made homes treated a target rather than a goal beginning in 2022, approved the Energy Division's (ED) proposed ESA program concept on a pilot basis (i.e., the ESA PP/PD program) to commence in 2022, and established a new ESA MFWB program to commence in 2023.

D.21-06-015's program element highlights for the 2022-2026 ESA Main program include:

- Shifting the program towards a customer-centered prioritization model based on treating households based on need and customer profile.
- Approving new measures for the program that focus on deeper energy savings, while allowing the Investor-Owned Utilities (IOU) flexibility in managing the portfolio by updating the measure mixes through engagement with the ESA WG and monthly reports.
- Allowing for customer self-certification to receive treatment of basic measures without income qualification or a waiver of property owner forms.
- Establishing cost-effectiveness guidelines.

[3] To qualify for the ESA program, the total customer household income must be equal to or less than 250% of the Federal Poverty Guideline (FPG), with income adjustments for family size. The program increased its income level from 200% FPL to 250% FPL on July 1, 2022 pursuant to Senate Bill (SB) 756.

- Establishing a new MFWB program to begin in 2023.
- Establishing an ESA WG to continuously monitor program progress and make recommendations.
- Approving the ED's ESA program redesign concept on a pilot basis (ESA Pilot Plus).
- Requiring the IOUs to establish effective coordination efforts among low income and clean energy programs.
- Directing research into the development of a Universal Application System (UAS).
- Manging impacts to ratepayers' bills by carrying over unspent funds to offset revenue collection and avoid large accumulations of unspent funds balances.

Energy Savings Assistance (ESA) Main Program

ESA Main Program Summary Table 1.1.1 compares PY 2022 authorized budgets and targets to PY 2022 actuals and achievements.

ESA Table 1.1.1
PY 2022 ESA Main Program Summary

	2022 Authorized/ Forecasted Planning Assumptions	2022 Actual	%
January 1-December 31, 2022			
Budget [a][b]	$118,591,601	$123,161,951	104%
Total Homes Treated [c]	59,340	67,567	114%
kWh Saved	15,093,167	24,601,916	163%
kW Demand Reduced	2,859	5,516	193%
Therms Saved	629,105	1,165,638	185%
GHG Emissions Reduced (Tons)	-	26,017	-

[a] D.21-06-015, Attachment 1, Table 8.
[b] Fund shift $2,685,793 from MF CAM budget and $2,670,226 from California Department of Community Services and Development (CSD) Leveraging budget to ESA Main budget. Detailed information can be found in Appendix A of this report: ESA Table 12 – ESA Fund Shifting.
[c] Including both First Touch and Retreated Homes.

In addition to the primary achievements detailed in this report's Executive Summary, including that the program exceeded its annual energy savings and households treated goals, PG&E provides additional PY 2022 highlights and detail for the ESA Main program below:

- In January 2022, PG&E transitioned to the ESA Basic/Plus Tiered Program Design which allowed CARE-enrolled customers to self-certify that they are eligible for the ESA program's basic tier services.
- Starting in Q1 and continuing into Q4, PG&E launched all but two of the new measures proposed in Joint Advice Letter (AL) 3842-E/3012-G et al.[4] filed by San Diego Gas and Electric Company (SDG&E). PG&E launched measures included air purifier, portable air conditioning (AC), cold storage, floor insulation, whole house fan, prescriptive duct sealing, and pool pump. PG&E opted not to launch diagnostic air sealing and freezers due to poor measure cost-effectiveness.

[4] PG&E Advice 4482-G/6314-E

- PG&E ran a targeted marketing campaign to promote heat pump water heaters to customers identified as potentially having existing electric resistance water heaters. This resulted in PG&E installing its first heat pump water heaters in the ESA program with a total of 150 units installed by the end of the year.
- In 2022 PG&E concluded its solicitation for the ESA Main (Basic/Plus) program implementation which was released in November 2021. New contracts were signed and in effect as of September 1, 2022.
    - As a result of the solicitation, Richard Heath and Associates (RHA) was awarded Northern and Central Coast regions, and Resource Innovations was awarded Bay Area and Central Valley regions.
- Since contract execution, PG&E has been collaborating with the program implementers on revamping program delivery, customer acquisition strategy, contractor training, contractor oversight, and other program components with the aim of improving customer satisfaction, program cost-effectiveness, and reaching customers who would most benefit from ESA program services.
- Furthermore, PG&E has changed the implementer compensation model from fee per home treated to a pay for performance model tied directly to an implementer's ability to meet the energy savings goals.

One notable change resulting from the ESA Main program solicitation was the transition of most contractor training responsibilities from PG&E to the program implementers, as further detailed in the Workforce Education and Training (WE&T) Section 1.7. PG&E opted to continue delivering Natural Gas Appliance Testing (NGAT) training in person by PG&E authorized trainers at PG&E facilities in order to keep more oversight and reduce potential program risks.

Multifamily Common Area Measures (MF CAM) Program

PG&E's MF CAM initiative officially launched in 2019 (soft launch in December 2018) to provide deed-restricted MF property owners and managers with the following to assist with the completion of energy retrofits of common areas and central system upgrades:

- Incentives that cover up to 100% of project cost for qualified EE retrofits for income-eligible and deed-restricted MF housing properties.
- No-cost utility energy benchmarking services.
- Coordination and treatment opportunities with ESA program for in-unit, and
- No-cost technical assistance that can be customized to support property owners and contractors throughout the program process.

The program's comprehensive no-cost technical assistance includes conducting pre-installation energy audits, property benchmarking, scope of work recommendations and development support, construction schedule monitoring, and post-installation inspections and verification.

PG&E's MF CAM program offers a comprehensive measure list to property owners with opportunities in the following categories: appliances, water heating, building envelope, heating and cooling, lighting and plug loads. Examples of an MF CAM treated property is included as Appendix B of this report: Common Area Measures Treatment Photos, and a summary of the 2022 MF CAM accomplishments is provided in Table 1.1.1.2.

ESA Table 1.1.1.2 2022 ESA MF CAM Program Summary			
	2022 Authorized Budget/ Forecasted Planning Assumptions	**2022 Actual**	**%**
Budget[a], [b]	$47,760,413	$6,309,903	13%
Properties Treated	33	45	136%
Buildings Treated	N/A	520	N/A
kWh Saved	N/A	1,755,800	N/A
kW Demand Reduced	N/A	39	N/A
Therms Saved	N/A	115,338	N/A
GHG Emissions Reduced (Tons)	N/A	2,045	N/A
[a] D.21-06-015, Attachment 1, Table 8. [b] Fund shift $2,685,793 from MF CAM budget and $2,670,226 from CSD Leveraging budget to ESA Main budget. Detailed information can be found in Appendix A of this report: ESA Table 12 – ESA Fund Shifting.			

As seen in Table 1.1.1.2, PG&E spent 13% of the authorized budget because the program had upsent funds from previous program years that were rolled over to 2022. Those unspent funds were due to delays in the initial launch of the program. In addition, the program paused enrollment of new projects in the first half of program year 2021 because no new authorized budget was available to MF CAM until D.21-06-015 was approved. Lastly, MF CAM projects on average take 25 months to complete installation from the initial enrollment, this long project lifecycle also hindered the program from treating more properties and resulted in more unspent funds.

Some of the noteworthy achievements, highlights and lessons learned for 2022 MF CAM include:

- MF CAM implemented a more streamlined project verification checklist and process that helped process payments more quickly, and the average payment turnaround time was reduced to three weeks from six weeks.
- A primary lesson learned from PY 2022 is that the majority of CAM projects completed work scopes that included multiple measure categories in which lighting measures account for nearly all electricity savings in the program, and domestic hot water measures account for the majority of gas savings in the program.
- In addition, heating, ventilation, and air conditioning (HVAC) measures accounted for over a quarter of incentive spending, but provided a relatively small proportion of approximately 10% of gas and electricity savings.
    - As a result of these findings, PG&E will consider examining ways to minimize HVAC costs and perhaps examining the potential for fuel substitution to deliver higher savings for future program design.
- PG&E also conducted two case studies for the AARTI Hotel and the Altenheim projects to highlight program success and create marketing collateral. These case studies provided a great venue for the program team to learn and connect with program participants, and the resulting marketing collateral included several quotes highlighting participants' satisfaction with the program offering.
    - The AARTI Hotel, in San Francisco, was chosen as a unique project that offered important resident services to its community, as the property provided essential youth services to formerly homeless youth in the area.

  - The Altenheim case study was done in a video format and highlighted the upgrades, savings, and benefits of this successful ESA CAM and Eden Housing project.

- MF CAM participants were connected with PG&E's Single Point of Contact (SPOC) for program leveraging opportunities available including other energy efficiency financing and incentive programs offered by IOUs, Community Choice Aggregators (CCA), regional energy networks, and air quality management and water districts.
- In 2022, SPOC tracked over 40 multifamily-serving programs throughout California and referred 424 customers. MF CAM and SPOC worked collaboratively to provide customers with a scope of work leveraging services to maximize a property's incentive funding and energy savings potential.

Northern Multifamily Whole Building (MFWB) Program

Pursuant to D.21-06-015, PG&E successfully completed a competitive Northern MFWB program solicitation that utilized a single-stage solicitation process with two-step selection that included the use of a Procurement Review Group (PRG) and an Independent Evaluator (IE).

The resulting Northern MFWB program—which will be implemented in 2023 by TRC, a non-utility third party— will provide whole-building upgrades, including resident units and common areas, to income-qualified properties. The Northern MFWB program design has been developed to be in full compliance with D.21-06-015 and with adherence to cost-effectiveness guidelines and the ESA program portfolio goals to achieve deep savings; the program design also considers opportunities to maximize "a building's demand response (DR) technologies, GHG reduction, water energy nexus, and the health, comfort, and safety of tenants".[5]

The Northern MFWB program will take a holistic approach to engaging income-qualified multifamily stakeholders in PG&E territory, with end-to-end project support for property owners/representatives and tenants, and strategies that drive installation contractor and trade ally success. The program will be accessible to both deed-restricted and non-deed restricted properties and will feature SPOC service that connects multifamily property owners and tenants with incentive-layering opportunities and financing resources to lower the barriers to participation.

[5] D.21-06-015, p. 500, OP 118.

ESA Table 1.1.1.3 2022 ESA Northern MFWB Program Summary			
	2022 Authorized Budget/Forecasted Planning Assumptions	**2022 Actual**	**%**
Budget	N/A	N/A	N/A
Administrative Budget [a]	N/A	N/A	N/A
Properties Treated	N/A	N/A	N/A
kWh Saved	N/A	N/A	N/A
kW Demand Reduced	N/A	N/A	N/A
Therms Saved	N/A	N/A	N/A
GHG Emissions Reduced (Tons)	N/A	N/A	N/A
[a] Implementation to occur no earlier than January 2023.			

ESA Pilot Plus and Pilot Deep Program

ESA Pilot Plus and Pilot Deep (Pilot Plus/Deep or the Pilot) is a pilot focused on achieving deep energy savings per home treated, through a combination of traditional and novel ESA interventions. D.21-06-015 approved the Pilot to begin implementation in 2022 with two treatment tiers: the "Pilot Plus" tier, which is intended to achieve five to 15% energy savings per household, and the "Pilot Deep" tier, which is intended to achieve 15 to 50% energy savings per household.[6] The measure packages will be comprised of both basic measures found in the ESA Main program, as well as more advanced measures unique to the Pilot.

The Pilot is positioned to gather data on several new or modified approaches to implementing the ESA program, including:

- Innovations in measure delivery.
- Greater measure expenditure per home.
- Greater energy savings and bill impacts per home.[7]
- Electrification.

The Pilot also offers an opportunity to better understand the long-term benefits of more extensive treatments (including non-energy benefits), and the cost-effectiveness of the interventions.[8] The Pilot is planned to operate through 2026.

To drive innovation and improve cost-effectiveness, PG&E opted to conduct a competitive solicitation for the design and implementation of the Pilot, which comprised the first half of 2022.[9] Pilot implementation commenced in the second half of the year with a fully executed contract between PG&E and a third-party Pilot implementer. Because the Pilot design was ultimately defined by the successful bidder, details of the pilot design only began to emerge in mid-2022. The latter half of the year focused on clearly defining the pilot design, the roles and responsibilities of various parties, and

[6] D.21-06-015, Attachment 2, p. 5.

[7] Ibid, p.1.

[8] Ibid, p.1.

[9] For more information, see PG&E AL 6412-E / 4530-G available at: https://www.pge.com/tariffs/assets/pdf/adviceletter/ELEC_6412-E.pdf

initiating the tasks and workflows necessary to enact them. Details regarding the distinguishing pilot design elements are included in Section 1.9.1.1.

ESA Table 1.1.1.4
2022 ESA Pilot Plus and Pilot Deep Program Summary

	2022 Authorized Budget/ Forecasted Planning Assumptions [c]	2022 Actual	%
Budget [a],[b]	$8,749,299	$907,761	10%
Homes Treated	-	0	-
kWh Saved (Plus = 5-15%)	5-15%	-	-
kWh Saved (Deep = 15-50%)	15-50%	-	-
kW Demand Reduced	-	-	-
Therms Saved (Plus = 5-15%)	5-15%	-	-
Therms Saved (Deep = 15-50 %)	15-50%	-	-
GHG Emissions Reduced (Tons)	-	-	-

[a] D.21-06-015, Attachment 1, Table 8.
[b] Included Administrative budget. D.21-06-015, Attachment 2 pg. 3. PG&E in AL 6412-E / 4530-G set forth a Pilot Plus/Deep spending plan not to exceed 10% administrative spend over the course of the 2021-2026 program cycle. Individual years' administrative spend may exceed 10%, particularly during ramp-up and ramp-down.
[c] Home treatment, kW demand reduction, and GHG emissions reduction targets were not included in D.21-06-015. PG&E will report on actual achievements upon completion of home treatment. There were no reportable home treatments completed in 2022.

Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Unspent Funds (Electric IOUs Only)

The Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Homes (MASH) programs both sunset in PG&E's service territory at the end of 2021, pursuant to Assembly Bill (AB) 217 (Bradford, 2013). As directed by D.15-01-027 that implemented AB 217, any unencumbered SASH/MASH program funds at the end of 2021 should be used for EE measures in low-income residential housing, as defined.[10] At the end of 2022, PG&E had approximately $9M left in its MASH budget, that it will propose to transfer to the ESA program.[11] In the first quarter (Q1) 2023, the electric IOUs plan to file a Joint AL for disposal of unspent funds from the SASH and/or MASH programs to the ESA program. After the AL is filed, budget authorization will be pending per ED disposition of the AL.

[10] OP 12 of D.15-01-027 states "The Program Administrators shall ensure that program expenditures in each utility's service territory do not exceed the total authorized budget amounts over the duration of the programs. The program incentive budgets will be available until all funds are exhausted or until December 31, 2021, whichever occurs first. Any money unspent and unencumbered on January 1, 2022, shall be used for "cost-effective energy efficiency measures in low-income residential housing that benefit ratepayers," as set forth in Public Utilities Code Section 2852(c)(3)."

[11] As of 12/31/2022, there was approximately $8.6M in incentive funds remaining in addition to some remaining administrative funds (approximately $0.5M) for PG&E. The final amount will be included in a 2023 Joint IOU AL.

ESA Table 1.1.1.5 2022 Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Unspent Funds (Electric IOUs Only) [a]			
	2022 Authorized Budget	2022 Actual	%
Budget	N/A	N/A	N/A
[a] Pending AL as described in preceding text.			

1.2. Marketing, Education and Outreach (ME&O)

1.2.1. Provide a summary of the segmentation strategy employed, (i.e., tools and analysis used to segment households and how households are segmented and prioritized for treatment, and how this information is communicated to the contractor/CBO).

For Marketing, Education & Outreach (ME&O) initiatives, PG&E used the joint utility methodology adopted by the CPUC in D.01-03-028 to develop eligibility estimates by geographic area. This method entails an annual estimation of eligibility for CARE, ESA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state. The joint utility methodology is further described in CARE Section 2.1.2.

Using the 2022 geographic area list of ESA-eligible customers, PG&E broke out ZIP+2 areas eligible for "self-certification" enrollment.[12]

PG&E provides the ZIP+2 geographic area lists to ESA program contractors for targeted program enrollment. Most ESA contractors scheduled their appointments geographically and worked through their assigned areas geographically to minimize costs.

1.2.1.1. Provide a summary of how customers are targeted/referred to implementation Pilots (Pilot Plus and Pilot Deep and Building Electrification)

Customer Targeting

Pilot Plus and Pilot Deep (Pilot)[13] will implement new approaches to customer targeting. This Pilot builds upon efforts started within PG&E's Main ESA program (i.e. utilizing customer characteristics to determine need state, and propensity to participate), and additionally incorporates energy usage analysis as an aspect of customer targeting. The intent is to determine if advanced energy usage analytics yield predictable results (particularly regarding customer depth of realized savings), and if so, how usage analytics can be used in combination with customer characteristics to support the ESA portfolio in the future.

PG&E intends to implement and evaluate multiple approaches to customer targeting throughout the duration of the Pilot. PG&E began assessing the Pilot's targeting framework in 2022 to ensure its results can be evaluated empirically and plans to continue such work in 2023.

[12] Over 80% of households living at or below 200% of the FPG Level.

[13] Pilot Plus and Pilot Deep refers to the regulatory language used in D.21-06-015 to describe the Pilot's requirements. However, in customer-facing settings, the Pilot is referred to as "Energy Savings Assistance Whole Home Program," or "ESA Whole Home" for short.

Coordination

The Pilot is being implemented at the same time as the ESA Main program, largely relying on the same eligibility criteria. In establishing the Pilot's customer targeting strategy in 2022, PG&E began coordinating customer outreach between the ESA Main program and the Pilot to limit the possibility of customers being contacted by multiple entities working within the PG&E ESA portfolio. Also for this reason, and as a means of differentiating Pilot offerings from those of the ESA Main Program, the Pilot's offerings were referred to as "ESA Whole Home" (relating the comprehensive and deep energy savings approach envisioned for the Pilot).

Pilot-Specific Approaches:

- Geographic parameters included Climate Zones 11 and 12 (northern Central Valley) as these are regions with substantial heating and cooling demand.
- Customers with dual-fuel PG&E service (gas and electric) were prioritized to maximize the potential household savings, and enable PG&E to implement all feasible measures (i.e. without the need to partner with another utility).
- Single-family detached homes were prioritized given the new ESA MFWB program is expected to implement novel approaches within the MF segment.
- PG&E prioritized customers likely to be income-qualified, whether or not they were already enrolled in CARE.
- The targeting criteria included data sufficiency as well: ensuring customers had at least 12 full months of service with PG&E, as to enable building a 12-month pre-treatment baseline for energy savings estimates.
- Finally, customers who had participated in ESA within the past two years were removed, given these customers have recently benefitted from home treatment.

PG&E generated an anonymized dataset comprised of the population above (approximately 300,000 customers), including customer attributes such as CARE enrollment status, location, and energy usage consumption features.[14] This data set was delivered through secure means to the Pilot implementer, whose team conducted advanced analysis to prioritize customers with the greatest potential to save energy. This analysis initially resulted in a prioritization of approximately 5,000 customers to begin Pilot outreach in 2022.[15]

Pilot-Specific Tactics

The Pilot implemented similar outreach tactics (direct mail, email, phone calls) as the ESA Main program, with a few notable exceptions described as follows:

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[14] Consumption features are a computation of specific energy usage characteristics, such as electricity used during summer months, natural gas used during winter months, and quantities of both energy sources used during shoulder months when heating and cooling are at low demand.

[15] Customers with solar interconnection were removed in 2022 as a temporary screening mechanism due to difficulty factoring solar generation into baseline EE assumptions. As energy saving measurement methods improve throughout the course of the Pilot, PG&E intends to include solar customers in targeting efforts.

ESA Whole Home Branding:
Collateral materials were branded with a different color palette and with messaging focusing on deep energy savings. The intent was to differentiate Pilot offerings from those of the main ESA program, namely the depth of investment associated with Pilot offerings. However, given the history of its use,[16] the ESA logo was utilized by the Pilot, with a "Whole Home" tag added below the logo.

Outreach activities were implemented by the Pilot implementer. The implementer conducted outbound direct mail, email and phone-based campaigns, and collected interest through email, phone and voicemail, as well as an informational Pilot webpage with an interest form. PG&E provided additional support (i.e., validation of Pilot offerings and implementation parties) by hosting a www.pge.com webpage with Frequently Asked Questions (FAQ), and providing PG&E customer call center staff with reference material about the Pilot. In 2022, materials were primarily offered in English with Spanish versions available for select items such as the PG&E and implementer webpages and leave-behind marketing material. Additional materials will be available in Spanish in early 2023. Additional translations will be considered as needed.

1.2.2. Provide a summary of the customer segmentation strategies employed (i.e., tools and analysis used to identify customers based on energy usage and other factors) and how these customer segments are targeted in program outreach.

The ESA Propensity Model (Model) was rebuilt and operationalized in November 2022. PG&E's ESA program uses a propensity model to identify and target customers who are most likely to apply for the ESA program and have their home treated. The Model leverages customer attributes and behaviors including location, language preference, rebate activities, commodity type, payment patterns, and demographics. The Model creates a ranking of customers according to their likelihood, or propensity, to participate in the ESA program. The Model then divides the customer into ten groups or deciles. Decile 1 is the most likely to participate in ESA, decile 10 being the least likely. Each decile divides customers into a grouping of 10% of the eligible population (according to their ranking). PG&E's CARE propensity model score is also included in the ESA Model as, historically, engagement with other PG&E programs leads to additional customer engagement. Compared to the previous ESA model, the new Model is 51% more efficient at capturing ESA applications in the top deciles. At 10% depth, the new ESA Model efficiency is 23% higher than the previous model. At 15% depth, the new ESA Model efficiency is 8% higher than the previous model. From 12/01/2022 to 01/31/2023, 50% of all ESA treated homes were completed for customers from deciles 1 and 2 of the current Model. Deciles 1 and 2 delivered 150% more total ESA treatments than if customers were selected at random.

[16] The ESA name and logo have been in wide use by each California IOU for over ten years, and thus can be assumed to have earned strong brand recognition.

2022 Energy Savings Assistance (ESA) Program | Marketing, Education and Outreach (ME&O) Tactics and Highlights

In 2022, PG&E continued to use marketing approaches and tactics that have proven successful in driving awareness and acquisition in the ESA program. To illustrate, PG&E's Marketing and Outreach (M&O) initiatives generated more than 73,000 qualified leads for ESA contractors in 2022, exceeding its goal by 22%. Overall assessment and treatment rate was 10% and 8% respectively, increased from 9% and 7% in 2021. In the following sections, PG&E details the outcomes from its approaches:

Direct Outreach

Throughout 2022, PG&E utilized proven marketing tactics to drive high ESA program awareness and acquisition. In Q1 and the second quarter (Q2), PG&E continued to use the simplified direct mail letter and application. This shorter application proved to be more convenient for customers. PG&E deployed new creative in the third quarter (Q3), prioritizing customers in DACs, and highlighting the change in income eligibility beginning in July, which made approximately 300k more customers eligible. Customers who may have not been eligible in previous years were encouraged to apply again. DAC response rate was 14% overall vs 9% for the non-DAC segment.

Examples of PG&E's ESA direct marketing materials are showin in Appendix C of this report: ESA Marketing Materials.

Paid Media

PG&E implemented an "Always-On" digital strategy to provide ongoing digital media presence to drive awareness, engagement, and enrollment. The digital media campaign started in January 2022 and ran through December 2022. The strategy included search engine marketing, digital display advertising, and social media ad placements. The 2022 media strategy retargeted ads to income-qualified customers that have similar characteristics to existing ESA customers and drove traffic to the ESA landing page, leading to increased conversion rates.

Some of the noteworthy outcomes include:

- Customers, on average, spent two minutes engaging with content on the ESA landing page, particularly the ESA customer journey video.
- Total online application submissions accounted for 51% of all leads generated, up from 45% in 2021.
- The strongest online response rate was in Q3 when PG&E launched new creative and prioritized customers in DACs.
- A month after launch of new creative across all digital channels, PG&E received more than 18,000 online applications.
- Year over year, the ESA digital campaign continues to gain efficiencies, outpacing previous performance, as evidenced by these key indicators:
    - Click-Through-Rate (CTR): 0.29% 2022 vs. 0.14% in 2021;
    - ESA home page visits: 227,282 in 2022 vs. 114,711 in 2021; and,
    - Lead conversions: 9,452 in 2022 vs. 5,444 in 2021.

Bill Inserts

PG&E sent bill inserts to CARE-enrolled customers in March 2022 to drive awareness of the ESA program among eligible customers and to generate leads for ESA contractors. The insert was bilingual with English on one side and Spanish on the other.

PG&E Earned Media and Owned Assets

PG&E continued to deploy an income-qualified digital newsletter to approximately 1.6M customers per month. Information about the ESA program was featured in the April 2022 edition of the newsletter. Content focused on the needs of income-qualified renters and homeowners with medium- to high-energy bills with the purpose of building awareness, driving enrollment, and providing relevant energy management tips and tools.

PG&E also used its Home Energy Reports (HER) to promote the ESA program. In 2022, ESA was featured in the April, June and September eHER (email) and the March and September pHER (paper) editions. PG&E also periodically featured the ESA program on the www.pge.com homepage to increase program awareness.

PG&E participated in media interviews throughout the territory to promote the ESA program with a focus on Spanish and Chinese in-language media including:

- **KGRB Radio:** Coverage in the Sacramento area that targeted Hispanic adults ages 18-65.
- **KTVO Radio:** SING Tao Radio. Offers programs in both Mandarin and Cantonese. Morning talk show with an estimated listenership of approximately 182,000.
- **KGRB:** Despierta Valle Central, “Wake Up Central Valley”, is a daily morning show that airs Monday through Friday from 5-7 am and reaches an average of 18,000 viewers per week, 18+, serving the Fresno-Visalia area.
- **KTVN:** Vietnamese language format that serves the San Francisco Bay Area with a specific focus on the Santa Clara Valley. Pre-recorded 10-minute segment interviews were aired at various times throughout the day. Targeted adults ages 30-60.
- **KRON 4.2 – Skylink TV:** Local San Francisco Chinese TV station. Estimated viewership in the Bay Area is approximately 100,000.
- **KSFN:** News for Chinese Radio operated by News for Chinese Newspaper. Free bi-weekly publication with approximately 30,000 circulation per issue. Three separate editions for the Peninsula, South Bay, and East Bay regions. Covers Alameda, San Francisco, Santa Clara, San Mateo, and other counties in the Bay Area. Estimated weekly listenership is approximately 100,000.

Community Events

The majority of PG&E’s in-person community events promoting ESA in 2022 were orchestrated by its partner network. This includes activities related to the Tribal Outreach Grant, as described in the ESA Tribal Outreach Grants Section, and activities related to its robust network of Community-Based Organizations (CBO) contracted for extensive ME&O activities in 2022. In addition, PG&E’s staff supported some activities in the community that promoted ESA, such as the California State Fair. In 2022, all of PG&E’s branch community service offices were closed, and therefore those sites were no longer venues for ESA contractors to market ESA directly to community members, as had been the case in prior program years.

1.2.3. Describe how the current program delivery strategy differs from previous years, specifically relating to Identification, Outreach, Enrollment, Assessment, energy Audit/Measure Installation, and Inspections.

Identifciation
In 2022, PG&E prioritized ME&O to customers residing in DACs for the ESA program.

Outreach
This year, PG&E prioritized targeted marketing to DAC customers. This campaign delivered a 45% open rate, a 5% CTR vs 2% for non-DAC, drove 78% of mobile traffic to the ESA home page, (61% of overall traffic), and accounted for 60% of all conversions in Q3. With the strategic targeting of DACs, PG&E received twice the number of applications in 2022 vs. 2021.

Enrollment
PG&E continued to offer ESA enrollment and energy education virtually in 2022.

Assessment
PG&E did not make any changes to the ESA program assessment process from 2021.

Energy Audit/Measure Installation
In January 2022, PG&E added the rescriptive duct sealing measure to the ESA Main program.

PG&E received approval at the July 28, 2022 ESA WG meeting to retire two measures: exterior hard-wired fixtures and diagnostic driven air sealing. PG&E worked with ESA implementers and contractors to phase out the installation of the exterior hard-wired fixture over the rest of the calendar year. Diagnostic air sealing had yet to be officially released.

In August 2022, PG&E launched the following program measures for need state customers: portable air conditioner, cold storage, air purifier and floor insulation. PG&E also launched whole house fans for single-family homes in eligible climate zones.

In October 2022, PG&E expanded the feasibility for the already existing central heat pump measure. Customers who had existing electric resistance forced air furnaces were then eligible for the central heat pump measure in CZ 1-5, 12 and 16. Detailed information can be found in Appendix A of this report: ESA Table 2 - ESA Main Expenses and Energy Savings by Measures Installed.

1.2.4. Describe Tribal outreach activities, including a summary of the biannual Tribal meetings, and an up-to-date list of Tribal contacts, including progress towards meeting goal for relationships with non-federally recognized tribes.

Initiatives
PG&E began outreach efforts in 2022 with a round of outreach to all 62 federally recognized tribes, 40 non-federally recognized tribes, 30 Tribal Housing Authority Offices, eight Tribe's Temporary Assistance for Needy Families (TANF) offices and four other state offices in its service territory. Email outreach included the following:

- Offers of webinars and/or phone call consultations; and

- The distribution of quarterly tribal newsletters. The newsletters provided customer assistance information, including alternate payment methods, greater access to PG&E's energy assistance programs, and ESA Tribal Outreach Grants.

ESA Tribal Outreach Grants[17]

In September 2022, PG&E awarded its first Tribal Outreach Grant to the Tejon Tribe. This grant (1) provided funding to the tribe to support their efforts to educate and inform tribal members about ESA and other relevant programs and services, and (2) encouraged tribal members' enrollment and participation. ESA program Tribal liaisons were identified to coordinate the distribution of marketing materials (via print media or electronically, via social media and emails), coordinate the service dates, and provide critical communication.

Grant-funded Activities

The Tejon co-chairperson sent out notifications to tribal members and posted program information on their website and in their newsletters. The ESA Tribal program information was provided to its residents in the events listed in Table 1.2.4.

ESA Table 1.2.4
Tejon Tribe: ESA Information Distribution at Events via Outreach Grant

Date	Event Type	# of Participants
October 2022	Council Meeting	46
October 2022	Harvest Gathering	60
October 2022	Diabetes Health Event	50
November 2022	Tejon Elders Meeting	50
November 2022	Thanksgiving Holiday Event	50
December 2022	General Council meeting	400
December 2022	Holiday Celebrations	25
December 2022	Newsletter	800

As a result, four Tejon Tribe members signed up for the ESA program. They were referred to the ESA contractor for work planned to be performed in early January 2023.

Setting the Foundation for 2023 Tribal Outreach Grants

In October 2022, PG&E invited Tribes, TANF and Tribal Housing Authority staff to a meeting to provide feedback on the Tribal Outreach Grant Program. A total of 16 tribal staff members responded to the meeting request and provided input on recommended changes for the Tribal Outreach Grant Program.

In December 2022, PG&E finalized modifications to its Tribal Outreach Grant program, based on tribal input received, and sent an announcement of the grant cycle. The primary changes to the 2023 Tribal Outreach Grant from 2022's Tribal Outreach Grant included an increase in funding available for each tribe, (from $5k to $30k annually) and an increase in the grant term (from 1-year grants to 2-year grants with an option to renew

[17] D.21-06-015, pps. 523 and 524, OP 194 requires the Joint IOUs to offer mini-grants to those point persons in Tribal communities who maintain regular communications with the IOUs and assisting in outreach for ESA and CARE programs.

for a third year). PG&E is pleased to have received tribal input and acted accordingly to modify its Tribal Grant opportunity to ensure future success.

In accordance with D.21-06-015[18], PG&E confirms that it has an up-to-date list of tribal contacts. Due to customer privacy concerns, PG&E is unable to provide an actual list of contact names as that information is not public.

1.2.5. Track Costs of Assembly Bill (AB) 793 related Energy Management Technologies programs (identify all of the programs or initiatives that will be able to benefit from the availability of the end-use and electric usage profiles, and to coordinate with the relevant proceedings so that the relevant costs can be considered in those proceedings' cost-effectiveness decision-making), including costs for Energy Education.

PG&E offers its income-qualified customers several energy management technology-related programs and tools to help them better manage their energy use.

Enhanced Energy Education

PG&E focuses its enhanced energy education on an ESA contractor-centric model in which ESA contractors leverage their in-home visits to provide energy education and help income-qualified customers know where and how to locate online tools available to assist in understanding and managing their energy bills. Leave-behinds (printed materials) further reinforce messages received during in-home visits.

In 2022, ESA Main contractor in-home energy education included the following initiatives, and in sum totaled $5,378,759:

- ESA contractors are required to inform customers about tools available for enrolling in Your Account (www.pge.com/youraccount), PG&E's online portal to access energy statements, energy alerts and associated information, and ESA contractors often assist the customer with registering.
    - In 2022, ESA contractors assisted 8,103 customers with signing up for Your Account and enrolled 9,750 customers in Energy Alerts.
- ESA contractors may also review the customer's energy usage, and highlight rate options, payment options and bill payment assistance programs.
    - In 2022, PG&E's ESA contractors were trained on new payment programs including the Percentage of Income Payment Plan (PIPP) and the Arrearage Management Plan (AMP); PG&E created a flag in the database to help ESA contractors identify qualified customers.
- ESA contractors also may encourage customers to visit the Home Energy Checkup tool, an online energy audit tool that helps customers disaggregate their energy consumption into different end-use categories to receive customized energy saving tips.
    - From this site, CARE-enrolled customers can view their latest Personalized Energy Profile (PEP) report. The PEP report, available to CARE-enrolled customers and ESA contractors quarterly, offers customized behavioral and energy conservation tips, and rate

[18] D.21-06-015, p. 457, Section 10.12.3.6.

recommendations based on the customer's energy use, load profile, and season of the year.

- In addition, participants in the ESA program receive collateral leave-behinds from ESA contractors with tips for managing energy, rate plan choices, and other programs and resources that they may be qualified for, both administered by PG&E and by third parties.
    - For example, PG&E's Universal Brochure provides comprehensive information to ESA customers about bill discount and assistance programs, rate plan choices, energy management and payment support programs in an easy-to-read format.

Smart Thermostats

In 2022, PG&E installed 14,625 smart thermostats which could be used to participate in PG&E's bring your own device automated Smart AC DR program. Of the smart thermostats that were installed by ESA, 885 customers opted to enroll in PG&E's Smart AC program.

Load Disaggregation Reports

PG&E launched the load disaggregation PEP reports in 2020. The load disaggregation reports used PG&E's electric and gas smart meter data to disaggregate CARE-enrolled customers' energy usage and provide them with tips to reduce their usage in the winter and summer months. The reports were made available to the ESA contractors via the contractor portal in June 2020. Contractors were asked to use these reports as part of their in-home ESA energy education activities. The reports were also made available to CARE-enrolled customers directly via the Your Account portal, starting in December 2020. PG&E continued to work with the third-party load disaggregation vendor to update reports quarterly with 1,271,134 reports available as of the fourth quarter (Q4) of 2022. In Q4, PG&E showed the customer accessing utilization increased by 5%.

Home Energy Reports (HERs)

PG&E used its HERs to promote ESA and other income-qualified programs for applicable audiences. In 2022, 2.93M customers received HERs. Of them, nearly 938,000 were income-qualified customers enrolled in the CARE program and 28,000 were enrolled in the FERA program.

Building Benchmarking Portal

PG&E encourages its income-qualified MF property owners to benchmark their properties using PG&E's building benchmarking portal, which uses PG&E's smart meter data to provide building owners and managers insights into how to save energy and reduce their operating costs. In 2022, PG&E's MF CAM program benchmarked 28 properties with 263 buildings in Energy Star Portfolio Manager (ESPM) for participating income-qualified MF property owners.

1.2.6. Managing Energy Use

Section 1.2.5 details the tools and resources provided and available to customers to assist in managing their energy use.

1.2.7. Services to Reduce Energy Bill

Section 1.2.5 includes a description of services the ESA contractors provide to customers to help reduce energy bill. In addition, the ESA program also has cross-referral and direct enrollment processes to auto-enroll eligible income-qualified customers

into either the CARE or FERA program, as appropriate, per the income eligibility guidelines.

1.3. ESA Program Customer Enrollment

1.3.1. Report the number of customers or households treated, the IOU specific 2022 household treatment target, and the percentage of households treated. If the IOU was not able to reach the total household target, please explain.

In 2022, PG&E treated 67,567 households, with a target of 59,340, totaling 114% of households treated for the ESA Portfolio, including ESA Main, MF In-unit, and MF CAM, with the exceptions of MFWB and PP/PD.[19] PG&E exceeded the total households treated target in 2022.

1.3.2. Please summarize new efforts to streamline customer enrollment strategies, including efforts to incorporate categorical eligibility and self-certification.

In 2022, PG&E's ESA program contractors continued to streamline customer enrollment strategies by incorporating categorical eligibility, self-certification, and virtual enrollment into ESA program processes, per program policies.

Categorical Eligibility
For categorical enrollment, a customer is eligible for ESA if they also are participating in other public assistance programs that have already verified their income eligibility, such as the Low-Income Home Energy Assistance Program (LIHEAP), Women, Infants & Children (WIC), CalFresh/SNAP, Supplemental Security Income (SSI), and Medi-Cal for Families. It is important for accurate categorial enrollment into ESA that ESA implementers, contractors, and intake specialists correctly assess the customer's enrollment.

Self-Certification
PG&E encouraged contractors to work in the 80% self-certification areas by providing them with breakdowns of estimated eligible customers by ZIP+2 to use in their customer recruitment activities. In 2022, PG&E treated 2,092 homes in these targeted self-certification ZIP Codes.

PG&E continued to fulfill its commitment to the CPUC's expanded ESA self-certification requirements in counties impacted by the California wildfires. Customers residing in the wildfire-impacted counties could self-certify for ESA if they lost income documents in the fires. In addition, households in which persons displaced by the wildfires reside, were able to self-certify for ESA, as well as customers where a new state of emergency proclamation was issued. In 2022, PG&E treated 216 homes in this self-certification category.

The expanded ESA self-certification requirements continue to be in place for a period of one year commencing from the date the state of emergency proclamation was issued or until PG&E service is restored.

[19] MFWB and PP/PD program implementation to occur no earlier than January 2023.

ESA treated other targeted self-certification enrollment including 102 customers who are self-employed and receiving cash wages, and 39 customers from the San Joaquin Valley (SJV) DACs pilot program.

1.3.3. If the IOU has failed to meet its annual savings goal, please provide an explanation of why the goal was not met. Explain the programmatic modifications that will be implemented in order to accomplish future annual energy savings goals.

PG&E exceeded the 2022 goals as shown in Appendix A of this report: ESA Table 2 - ESA Main Expenses and Energy Savings by Measures Installed. This was primarily due to a shift in ESA implementer contracts where the payment structure is designed to incentivize installation of measures with high energy savings. In the first eight months of 2022, implementers were paid through a comprehensive homes treated incentive. For the last four months of 2022, PG&E moved to a model where implementers are paid through a price per kW, kWh and therms.

2022 Energy Savings Assistance (ESA) Program Modifications

Beyond the measure modifications described in Section 1.2.3, there were no substantive modifications to program operations in 2022. In 2022, PG&E updated the ESA enrollment form to begin capturing the veterans customer segment, as well as including "decline to state" options for disability status and ethnicity, to support customer privacy.

1.4. Disability Enrollment Efforts

1.4.1. Provide a summary of efforts to which the IOU is meeting the 15% enrollment goal.

Disabled customers are estimated to make up 26% of the ESA program enrollees in 2022, exceeding the 15% enrollment goal. Because ESA contractors are not authorized to ask households about disabled occupants, households were counted and recorded by ESA contractors based on visual observations or unsolicited comments by occupants. Thus, participation of households with a disabled occupant may actually be higher than recorded.

1.4.2. Describe how the ESA program customer segmentation for ME&O and program delivery takes into account the needs of persons with disabilities.

PG&E's ESA program delivery takes the needs of persons with disabilities into account by providing specialty measure enhancements to ESA customers with disabilities. For example, side-by-side and bottom-mount refrigerators are available to customers with disabilities. In 2022, ESA installed 155 of these special-order refrigerators.

PG&E produces ESA program materials to help customers who are blind or have low vision, and provides alternate customer formats upon request. A large print ESA fact sheet continues to be available on PG&E's website, or customers can call or email PG&E to receive the fact sheet in Braille or large print. These fact sheets are available and provided to ESA contractors and community outreach partners to share with customers. In 2022, PG&E also updated the enrollment form to include an option for customers to decline to state their disability status. This option is to be rolled out in 2023.

1.4.3. Identify the various resources the IOUs utilize to target the disabled community and the enrollments as a result.

ESA Table 1.4.3 2021 Disability Enrollments			
Source	**Total Enrollments**	**Disability Enrollments**	**% of Disability Enrollment**
Various contractor recruiting and sign-ups			
Total Enrollment Rate	**67,567**	**17,898**	**26%**

PG&E's outreach strategy includes collaboration with strategic community partners to provide energy education as well as facilitate enrollment in the ESA program. In 2022, PG&E contracted with 14 CBOs to provide ME&O to customers on various assistance and bill savings programs, including ESA.

1.4.4. If participation from the disabled community is below the 15% goal, provide an explanation why.

In 2022, disabled community participation in ESA was an estimated 26%.

1.5. Leveraging Success, Including Low Income Home Energy Assistance Program (LIHEAP)

In 2022, ESA contractors referred approximately 142 customers to the LIHEAP program. For PG&E estimated savings from its water agency leveraging initiative, see Sections 1.6.2 and 1.6.4 of this report. Specific results of 2022 leveraging activities are shown in Appendix A of this report: ESA Table 14 - ESA Leveraging & Integration.

1.5.1. Describe the efforts taken to reach out and coordinate the ESA program with other related low-income programs offered outside the IOU that serve low-income customers.

The following efforts were coordinated in 2022 with ESA enrolled or CARE enrolled customers:

- 45 customers were served through the Kohler Battery Program. This offering was orchestrated through a $1.8M Kohler investment made pursuant to a settlement with the California Air Resources Board.
- Through PG&E's Medical Baseline (MBL) Customer Portable Battery Program (PBP), 3,776 ESA customers were served. The purpose of this program is to provide selected, qualifying customers a backup battery to power vital medical equipment during the onset of a Public Safety Power Shutoff (PSPS) event.
- ESA coordinated with the Residential Storage Initiative, a program that is designed to support financially disadvantaged (CARE-enrolled) customers located on circuits at the highest risk of outages by improving their resiliency by installing a permanent battery. 29 of these homes were served in 2022.

1.5.2. In addition to tracking and reporting whether each leveraging effort meets the above criteria in order to measure the level of success, please describe the Other Benefits resulting from this particular partnership not captured under the three criteria described above.

PG&E has not tracked other leveraging benefits outside of those captured under the three following criteria: dollars saved, energy savings/benefits, and enrollment increases. These are shown in Appendix A of this report – ESA Table 14: Leveraging and Integration.

1.5.3. Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented for this program year? What was the result in terms of new enrollments?

Low-Income Home Energy Assistance Program (LIHEAP) Refrigerator Leveraging
In 2022, PG&E did not have any refrigerators installed through the refrigerator leveraging program. A number of CBOs expressed interest in the partnership; however, they noted that the subcontractors they worked with stated that the reimbursement amounts for the refrigerators were too low. This is an area for future review.

Low Income Weatherization Program (LIWP) – Multifamily Whole Building (MFWB) Coordination[20]
PG&E and the California Department of Community Services and Development (CSD) held several conference calls throughout the year to discuss and exchange information on the CSD Low Income Weatherization Program (LIWP) – ESA leveraging program. All meetings were attended by three parties: PG&E, CSD, and the Association for Energy Affordability (AEA – CSD's implementer). PG&E and CSD were unsuccessful in leveraging a project as LIWIP projects are primarily focused on GHG savings and electrification. PG&E did not offer electrification in PY 2022 through its ESA program which made leveraging projects a challenge. PG&E plan to introduce electrification measures into the portfolio mix in PY 2023 and will revisit with CSD and AEA to determine if there are any projects that can be successfully leveraged while optimizing costs.

1.5.4. Describe the coordination efforts with water agencies or companies (wholesalers or retailers).

In 2022, PG&E's Water-Energy Coordination Program (WCP) completed a fourth full year of production. The program provides water conservation assessments and measures to ESA customers in individual water agency territories. PG&E continued to partner with California American Water's Monterey, Sacramento, Santa Rosa, and Merced districts; City of Santa Cruz Water Department, Solano County Water Agency, Alameda County Water District, and Sonoma Water.

Through the program, ESA contractors evaluated toilets using toilet dye tabs, replaced eligible toilets, conducted outdoor assessments, examined meters, performed leak detections and provided water conservation education. Customers also received conservation giveaway items such as hose nozzles and shower timers, and literature about additional water conservation opportunities. In 2022, 507 homes were served

[20] D.16-11-022 required PG&E to fund ESA measures currently offered by ESA for MF customer households participating in CSD's LIWP for MF buildings.

resulting in approximately 9,080,000 gallons of water savings and approximately 12,117 embedded kWh.

Production in the WCP experienced a slight drop in 2022 from the previous year due to a number of factors. Customer concerns over COVID-19 lingered, causing some customers to be wary of allowing field staff into their homes. To address these concerns, PG&E continued to ensure that COVID-19 protocols were utilized. Contractors used telephone screenings to qualify customers, minimizing in-person contact. They also wore masks and face shields, used hand sanitizer between homes, never entered a customer home if they were sick or feverish and always ensured the customers were not ill prior to entry.

The lingering impact of COVID-19 also impacted water agency revenues. Customer bill delinquencies impacted water agency revenue and discretionary dollars for conservation programs were reallocated, making it challenging to start new programs.

Finally, the transition of the ESA program into the new contract cycle delayed the onboarding of new program WCP contractors due to uncertainty of whether they would be serving specific regions. These issues were resolved with the establishment of the new program cycle contracts.

Included as Appendix D of this report is the 2022 Energy-Water Coordination Program Report, which offers in-depth detail on partnerships, program challenges. and accomplishments.

1.6. Integration Success

To support program integration and cross-enrollments, PG&E continued distribution of the customer-assistance-focused “Universal Brochure” in multiple languages, including Braille. The brochure was utilized during enrollment visits as part of the leave-behind collateral with customers. ESA contractors also referred to this brochure when communicating with customers over the phone. In addition to ESA, this brochure offers information on accessing the following programs:

- CARE
- FERA
- Relief for Emergency Assistance Through Community Help (REACH)[21]
- Balanced Payment Program
- Payment Arrangements
- Bill Guaranty
- Third-Party Notification (past due reminders)
- Your Account Platform
- Cooling Centers[22]
- MBL
- Rate Choices including Time-of-Use (TOU) rate plans[23]

[21] https://www.pge.com/en_US/residential/save-energy-money/help-paying-your-bill/one-time-assistance/reach/reach.page

[22] https://www.pge.com/coolingcenters

[23] https://www.pge.com/en_US/residential/rate-plans/rate-plan-options/understanding-rate-plans/understanding-rate-plans.page

As part of the collateral leave-behinds with the customers during enrollment visits, PG&E continued to distribute other brochures to help customers save money and better manage their energy bills. These materials included information on DR options, the California Wildfire Program, and how to prepare for potential PSPS outages. Until end of Q1 2022, ESA contractors also provided leave behinds related to the phase out of COVID-19 emergency protections, including PG&E's COVID-19 protections Fact Sheet that outlined the phase out timeline and provided resources and programs to assist customers with past due bills, along with the Housing Is Key's COVID-19 Emergency Rental Assistance flyer. Starting in Q2 2022, ESA contractors also began providing leave behinds related to the Affordable Connectivity Program (ACP), which provides a subsidy on customers' monthly internet service bills through local broadband providers.

1.6.1. Describe the new efforts in the program year to integrate and coordinate the ESA program with the CARE program.

In 2022, PG&E continued efforts to integrate ESA messaging into general CARE outreach efforts and materials, and offered ESA services to high-energy users on CARE. PG&E also sent a bilingual English/Spanish CARE Welcome Kit via direct mail or email to newly enrolled CARE customers which included an ESA program application. This tactic continued to be successful generating more than 2,800 applications for a response rate of 9%.

As discussed in Section 1.2.1 of this report, CARE-enrolled customers received PG&E direct marketing outreach, and were targeted by ESA contractors in their outreach efforts. ESA contractors, CARE Community Outreach Contractors (COC), and CBOs contracted with PG&E to provide CARE ME&O services or via the FERA CBO pilot (as described in Section 4.3.1), continued to cross-promote ESA and CARE programs via their outreach activities. In 2022, PG&E also continued to automatically enroll customers who participate in ESA into CARE and/or FERA, depending on income level.

1.6.2. Describe the new efforts in the program year to integrate and coordinate the ESA program with the EE Residential program.

Multifamily (MF) Single Point of Contact (SPOC)

PG&E launched its MF SPOC service in 2017 to provide a single PG&E representative to serve as the primary point of contact, and a go-to contact and resource for MF customers to learn about all program opportunities applicable to MF properties.

In 2022, PG&E continued to expand the services SPOC offered MF customers. SPOC launched the one-stop model for customers, facilitating and coordinating program access for property owners, managers and tenants. SPOC also began referring customers to water district, air quality management district, and DR programs. The SPOCs worked closely with the other IOU SPOC programs to continue statewide coordination as well as the ESA CAM, Multifamily Energy Savings Program (MESP), and California Energy-Smart Homes program teams to increase referrals, program layering, and marketing opportunities.

Table 1.6.2.1 summarizes the 2022 SPOC calls and referrals. Calls received may result in multiple referrals.

ESA Table 1.6.2.1 SPOC Calls Received and Call Referrals				
	2017 – 2022 Count	**2022 Count**	**2021 Count**	**2022 % change from 2021**
SPOC Calls	744	197	143	+ 27%
SPOC MF Program Referrals	1196	424	214	+ 50%

As demonstrated in Table 1.6.2.1, in 2022, SPOC calls and referrals significantly increased compared to 2021, with program referrals demonstrating the most substantive increase.

In 2022, PG&E's SPOC made 424 referrals, representing at least 6,407 MF dwelling units, to 37 programs. Those 424 referrals resulted in 66 applications being submitted to 16 different programs, resulting in a 16% conversion rate. The SPOC collects information about customer applications using available project data reported from third party programs and through customer survey responses. The two methods of data collection are often incomplete because of the low response rate. PG&E's SPOC asks the customer whether the property or project applied to the program we referred them to. This remains an area for further improvement.

Table 1.6.2.2 provides SPOC program-specific referral data for 2022 (inbound inquiries via hotline calls and email) and includes PG&E programs as well as other utility programs operating in PG&E territory for split commodity properties.

While SPOC is a MF resource, the program received inquiries from customers with less than five units and single-family dwellings. PG&E's SPOC routed at least 378 single-family units to the PG&E marketplace and rebate catalogue, ESA In-unit, LIHEAP, or the Bay Regional Energy Network (BayREN) single-family home program (BayREN Home+), based on eligibility and ownership structure (renter versus owner).

ESA Table 1.6.2.2 SPOC Program Referrals				
Program	**Customers**	**Buildings**	**Dwelling Units SF**	**MF**
Bay Area Air Quality Management District (BAAQMD) Charge! Elelctric Vehicle (EV) Program	4	9	-	87
Sonoma Clean Power (SCP) Advanced Energy Build (AEB)	1	1	0	33
BayREN Bay Area Multifamily Building Enhancements (BAMBE)	27	313	-	2647
Building Initiative for Low Emissions Development (BUILD)	15	125	121	618
Marin Clean Energy (MCE) Multifamily Energy Savings Program (MFES)	2	1	-	12
BayREN Home+	4	38	84	-
California Energy Design Assistance (CEDA)	19	3	-	1200
Comfortable Homes Program	14	6	6	-

ESA Table 1.6.2.2 SPOC Program Referrals (continued)				
Program	**Customers**	**Buildings**	**Dwelling Units SF**	**MF**
Demand Management Programs	1	N/A	N/A	N/A
Energy Star Rebate Finder	1	1	4	-
Energy-Smart Homes	60	235	127	686
ESA CAM	37	80	-	1161
ESA In-Unit	29	30	13	741
Misc. EV Programs	13	357	83	2843
California Alternative Energy and Advanced Transportation Financing Authority (CEATFA) GoGreen Home Energy Financing	9	2	3	N/A
CSD Low Income Home Energy Assistance Program (LIHEAP)	1	1	1	-
CSD Low-Income Weatherization Program (LIWP)	36	51	-	1077
Multifamily Energy Savings Program (MESP)	92	678	-	2499
Modesto Irrigation District (MID) Programs	0	0	0	0
On-Bill Financing	4	2	-	30
PG&E Market Place	16	14	19	109
Roseville Electric Utility (REU) Roseville Advanced Homes Program (RAHP)	3	1	1	94
Property Assessed Clean Energy (PACE)	1	2	0	412
PG&E Rebate Catalogue	12	13	17	0
Southern California Edison (SCE) Programs	4	N/A	N/A	N/A
Southern California Gas (SoCalGas) Programs	3	N/A	N/A	N/A
San Diego Gas and Electric (SDG&E) Programs	0	0	0	0
Self-Generation Incentive Program (SGIP)	9	8	1	206
Sacramento Municipal Utility District (SMUD) MFWB	8	18	-	215
SMUD Smart Homes	4	140	140	0
SMUD Neighborhood Solarshares	1	N/A	N/A	N/A
Solar on Multifamily Affordable Housing (SOMAH)	10	119	-	414
TECH Clean California	8	8	0	68
Turlock Irrigation District (TID) Programs	1	13	0	104
3C-REN Multifamily Home Energy Savings	1	N/A	N/A	N/A
Water District Programs	13	46	0	992
Air Quality Management District Programs	2	1	2	0
Total units given referrals [b]		**6,407 MF Dwelling Units 378 SF Dwelling Units**		

ESA Table 1.6.2.2 SPOC Program Referrals (continued)				
Program	**Customers**	**Buildings**	**Dwelling Units SF**	**MF**
No program available	0	0	0	0

[a] "N/A" in Table 1.6.2.2 indicates information that was unavailable as a result of resident referrals or callers who either did not have or were unable to provide building and unit data (for example, new construction projects early in the planning phase).
[b] Some customers are referred to multiple programs for the same property. Those buildings and dwelling units are reported per program. The total number of reported dwelling units does not include duplicates.
[c] "-" in Table 1.6.2.2 indicates that a program does not accept that type of dwelling unit.

PG&E SPOC tracks the number of link clicks on the SPOC webpage at www.pgemultifamily.com, and how many visitors are navigating to one of the program websites from the SPOC landing page. In 2022, 940 unique visitors viewed the SPOC website for a total of 1,669 views (indicating repeat visitors). Table 1.6.2.3 summarizes click data from the SPOC landing page to PG&E's homepage and 14 energy program websites.

ESA Table 1.6.2.3 SPOC Click Data	
Energy Program Website	**# of Clicks**
www.pge.com	46
ESA In-Unit	0
ESA CAM	13
MESP	25
BayREN	11
Building Initiative for Low Emissions Development (BUILD)	18
California Energy-Smart Homes	22
CSD LIWP	20
SGIP	0
MCE Multifamily Energy Savings	11
SOMAH	9
GoGreen Affordable Multifamily Energy Financing	7
SMUD Multifamily	10
Switch is On	3
TECH Clean California	5
Total	**200**

Energy Efficiency (EE) Multifamily Energy Savings Program (MF MESP)

SPOC referred 42 callers to MF MESP and recommended MESP for 180 ineligible ESA CAM properties, resulting in a total of 222 referrals to MESP.

Energy Efficiency (EE) Residential Energy Advisor

- **Your Account:** In 2022, the Your Account platform provided more comprehensive self-service tools to all PG&E customers (including ESA customers) who are enrolled in Your Account. Key enhancements such as bill journeys, which provide energy usage details and comparisons; Home Energy Checkups, including bill disaggregation; and personalized tips continued to help customers reduce their energy usage. Your Account continued to offer rate comparisons and a Bill Forecast Alert in 2022.

- **Home Energy Report (HER):** PG&E used HERs to promote ESA and other income-qualified programs to its customers. In 2022, 2.93M unique customers received a HER. Of those, approximately 938k were CARE customers, and approximately 28k were FERA customers.

1.6.3. Describe the new efforts in program year to integrate and coordinate the ESA program with the Energy Efficiency Government Partnerships Program.

In September 2022, MF CAM was selected to present a poster at the California Climate and Energy Collaborative (CCEC)'s annual forum. The poster was titled "*How Multifamily Clean Energy Programs Help to Achieve Climate Action Goals*" and was selected to highlight barriers to program awareness or participation, the benefits of EE programs, and how resources such as SPOC can be part of a larger government partnerships effort supporting EE adoption. The CCEC annual forum brings together stakeholders such as CBOs, local governments, CCAs, and tribal representatives who all either administer their own energy programs and/or are seeking information on the availability of programs and resources that exist in the market.

1.6.4. Describe the new efforts in the program year to integrate and coordinate the ESA program with any additional EE programs.

In 2022, PG&E continued to incorporate ESA and ESA-qualified customers into overall EE program marketing campaigns. This included developing income-qualified versions of monthly digital newsletters and HERs which offered low- and no-cost programs, as well as energy savings recommendations and behavioral tips to lower energy use and bills. Free tools such as Bill Forecast Alerts and Home Energy Checkups were also promoted to these customers through income-qualified program materials and standard marketing channels including email, digital advertising, and via www.pge.com.

1.6.5. Describe the new efforts in the program year to integrate and coordinate the ESA program with the DR programs, including successes in AC Cycling or other DR programs, including the new Summer Reliability programs from D.21-12-015.[24]

In 2022, PG&E continued its promotion of DR through the ESA program by providing two different promotional leave behinds; the first is a flyer highlighting two DR programs – Power Saver Rewards and SmartAC – that the energy specialist provides during ESA enrollment; and the second leave behind focuses on the SmartAC Program, and is provided by the weatherization specialist when ESA customers receive the smart thermostat. In 2022, there were 885 ESA customers enrolled in the SmartAC program.

1.6.6. Describe the new efforts in the program year to integrate and coordinate the ESA program with the California Solar Initiative (CSI) programs.

California Solar Initative (CSI) programs were fully subscribed in PG&E territories in 2021.

[24] D.21-12-015: Phase 2 Decision Directing PG&E, SCE, and SDG&E to Take Actions to Prepare for Potential Extreme Weather in the Summers of 2022 and 2023.

Distributed Generation (DG) Program: Disadvantaged Communities Single-Family Affordable Solar Homes (DAC-SASH) Program

PG&E's ESA program works with DAC-SASH program administrator GRID Alternatives to deliver ESA services to customers that have been approved to participate in the DAC-SASH program. On a regular basis, GRID Alternatives provides PG&E's ESA program with a list of DAC-SASH eligible homes prior to installing solar electric systems. PG&E checks to see if any of these customers have participated in the ESA program, and if not, reaches out to eligible customers to enroll them in the ESA program. In 2022, the ESA program treated 295 homes that participated in the DAC-SASH program. Additionally in 2022, the ESA program continued to provide a list of ESA customers potentially eligible for DAC-SASH to GRID and utilized part of this list in an email campaign that resulted in new leads generated for the DAC-SASH program.

In 2022, PG&E and GRID Alternatives launched a new co-marketing campaign for DAC-SASH. The campaign consisted of a targeted email sent to 4,225 customers that resulted in 290 visitors to program websites, and 102 project leads generated, for the creation of 26 DAC-SASH projects currently in the queue for potential contracting and installations.

1.6.7. Provide the number of referrals to the Single Family Affordable Solar Homes (SASH) Program Administrator.

The SASH program was fully subscribed in PG&E territories in 2021. Therefore no new referrals were made to the SASH program administrator, GRID Alternatives during the year.

1.6.8. Report annually the number of referrals provided to other Program Administrators (PAs) for participation and the number of leads they successfully acted on by program type.

2022 results are included in Appendix A of this report: ESA Table 14A – ESA Clean Energy Referral, Leveraging, and Coordination.

1.7. Workforce Education & Training

1.7.1. Please summarize efforts to improve and expand ESA program workforce education and training (WE&T). Describe steps taken to hire and train low-income workers and how such efforts differ from prior program years.

Energy Savings Assistance (ESA) Training

In Q1 and Q2 of 2022, ESA program trainings continued in virtual learning webinar format with the exception of NGAT remaining as a blended in-person and webinar sessions (referenced in Table 1.8.2 as "NGAT Training Blended"). Starting in Q3 and Q4 of 2022, ESA program trainings adopted the Train-the-Trainer (TTT) model, in which PG&E develops and manages the training materials (PowerPoint, video, on-demand, and knowledge assessments) while the implementer delivers the training in live format with approved instructors. PG&E administers and tracks formal training assessments and may audit training to ensure training effectiveness. This TTT model includes on-demand courses and in-person learning classrooms in both English and Spanish. Since implementing these approaches, PG&E continues to offer contractors a comparable level

of training to prior in-person training (pre-pandemic) at the discretion of the contractor and at reduced travel cost for subcontractors.

At the beginning of 2022, PG&E's WE&T program launched on-demand remote training to provide additional convenience and accessibility to its offerings. Throughout the year, PG&E continued to evaluate participant and contractor feedback and training data, to determine the effectiveness of the ESA on-demand & NGAT blended learning plans. Converting in-person training to virtual and on-demand learning was a logistical challenge and raised questions of instructional effectiveness. In anticipation of barriers such as digital literacy, broadband access, family obligations related to distance learning for children, childcare challenges and others, the WE&T program prepared a multi-pronged solution to ensure successful outcomes. WE&T leveraged stakeholder feedback, along with the following strategies, to inform the delivery approach, which included:

- The use of new technologies (webinar platform, polling/survey applications, and a user-friendly learning management system).
- An emphasis on adult learning principles (engagement techniques, training length/cognitive load, and knowledge checks).
- The introduction of supplemental training materials and resources (on-demand preparation training, how to enroll and accessing training materials with file-sharing applications, including via demo videos).

WE&T provides demo videos to proactively reduce barriers related to digital literacy. The demo videos help learner navigate the learning management system, accessing training materials, and enrolling into live courses.

Recruiting Efforts

In 2022, PG&E had 32 unique ESA contractor companies, with approximately 1,174 staff, implementing the program in the field. ESA program contractors bring their local in-language knowledge to help recruit participants from the communities in which they live and work.

ESA contractors typically recruit and hire field personnel within their respective local communities to deliver program information authentically, in language and in culture, which helps provide greater program awareness and acceptance within the communities served by ESA contractors. Some of the techniques used by ESA program contractors to recruit field personnel employees included, but were not limited to:

- Posting on the CalJOBS website, along with veterans and workforce development boards, locally for a minimum of two weeks prior to general public posting.
- Advertising listings in technical colleges.
- Placing ads on Craigslist, Indeed job boards and other similar online sites.
- Distributing job postings through a network of CBOs and entities serving communities regionally.
- Posting on company social media outlets to include the company website, LinkedIn and Facebook.
- Recruting ESA program participants who expressed an interest in being an Energy or Weatherization Specialist, and;
- Using word of mouth within their respective communities.

1.7.2. Please list the different types of training conducted and the various recruitment efforts employed to train and hire from the low-income energy efficiency workforce.

Energy Savings Assistance (ESA) Training

PG&E's WE&T program provides training to ESA contractors, including weatherization specialists (installation crews), energy specialists (assessors/educators), and NGAT technicians. PG&E's training in safety, ESA home assessment, energy education, customer service, weatherization services and measure installation provides workers with skills and work experience that are transferable to other demand-side management roles and clean energy jobs.

In 2022, PG&E trained over 368 individual contractor staff to work as energy specialists, weatherization specialists, and NGAT technicians for the ESA program, equating to a total of 590 full student training days. Each of the students that completed training had been hired and were in the process of being onboarded by a participating contractor. ESA contractor training conducted throughout 2022 is detailed in Table 1.8.2.

ESA Table 1.8.2
ESA Program Training

Type of ESA Training Conducted	Length of Training	2022 Employees Trained	Student Days
ESA Program Onboarding Total [a]		**110**	**110**
ESA Program Onboarding On-Demand	Self-Paced	110	110
Energy Specialist (ES) Total -		**87**	**240**
ES Certification Training Webinar	5 days	34	170
ES Certification Training OnDemand	Self-Paced	36	36
ES Certification Training Live	2 days	17	34
Weatherization Specialist Total		**56**	**81**
Weatherization Specialist Training Webinar	2 days	25	50
Weatherization Specialist Training OnDemand	Self-Paced	20	20
Weatherization Specialist Training Live	1 day	11	11
Advanced Weatherization Specialist Total		**48**	**68**
Advanced Weatherization Specialist Training Webinar	2 days	20	40
Advanced Weatherization Specialist Training OnDemand	Self-Paced	17	17
Advanced Weatherization Specialist Training Live	1 day	11	11
NGAT Total		**66**	**91**
NGAT Training Blended Webinar	2 days	25	50
NGAT Training Blended OnDemand	Self-Paced	22	22
NGAT Training Blended Live	1 Day	19	19
Total	**-**	**368**	**590**

[a] ESA Program Onboarding is an On-Demand (online, self-paced) training. Completion times vary by person. Estimated completion time is two-four hours.

1.7.3. For the ESA Program - Provide the following metrics related to WE&T in support of Commission's effort to increase workforce opportunities for workers in disadvantaged areas.

Percent of Incentive Dollars Spent on Contracts with a Demonstrated Commitment to Provide Career Pathways to Disadvantaged Workers

PG&E's contracts with its two primary ESA implementers require that implementers and contractors track hiring of local and disadvantaged workers, as well as trainings offered and completed, ESA job attainment, and ESA worker advancement. As such, the program is structured so that all ESA contractors can provide career pathways to disadvantaged workers. After completion of a competitive solicitation for ESA Main program implementers, PG&E executed its implementer contracts in mid-2022 and in Q4 2022, implementers completed their Implementor Program Manual, detailing how they will meet requirements including for reporting workforce outcomes. Due to the timelines of these 2022 activities, PG&E anticipates having data to report for this metric in PY 2023.

Number of Community Workforce Resources (CWR) Participants Employed for 12 Months After Receiving Training

The statewide Career and Workforce Readiness (CWR) program launched in late 2021. In 2022, 462 participants enrolled in training through the CWR program with 273 participants who completed training being placed in jobs using EE skills and seven having been employed for 12 months after receiving training. Many students that enrolled in 2022 are still actively involved in training and therefore, have not yet been placed in jobs.

Percentage of Total WE&T Training Program Participants that Meet the Definition of Disadvantaged Worker

In 2022 approximately 80% of ESA contractor training participants and approximately 45% of EE Workforce Education & Training (IEET) Technical Upskill training participants met the definition of disadvantaged worker.[25]

1.8. Studies

1.8.1. For each Study, provide (1) a summary describing the activities undertaken in the study since its inception; (2) the study progress, problems encountered, ideas on solutions; and (3) the activities anticipated in the next quarter and the next year.

Table 1.8.1 provides an overview of the ESA Studies that PG&E and/or the IOUs conducted in 2022. Budgets associated with these authorized studies are provided in Appendix A of this report: ESA Table 15 – ESA Expenditures for Pilots and Studies. Details on the Categorical Eligibility Study and Community Help and Awareness of Natural Gas and Electric Service (CHANGES) Evaluation can be found in Section 2.8 of this report.

[25] These metrics are based on the CalEnviroScreen 3.0 map; the CalEnviroScreen 4.0 map shows similar results.

ESA Table 1.8.1 ESA Studies				
Study	**Lead Consultant**	**Contracting IOU**	**Project Initiation**	**Project Completion**
2022 Low Income Needs Assessment (LINA)	Evergreen Economics	SCE	Jan 2021	Dec 2022
MF CAM Process Evaluation	Resource Innovations	PG&E	Aug 2021	Oct 2022

2022 Low Income Needs Assessment (LINA) Study[26]

AB 327 (Public Utilities Code Section 382) requires a Low Income Needs Assessment (LINA) to be conducted on behalf of the joint IOUs and the ED every three years. The 2022 LINA is the fifth report and focuses specifically on examining the income-qualified rental housing market. Much of the prior research on income-qualified single-family and multifamily spaces focuses on homeowners or multifamily buildings, and does not specifically address the different issues facing the rental households themselves, which span both single-family and multifamily buildings. The 2022 LINA built on key findings from prior research and shifted focus to understanding rental household needs and participation barriers in relation to the measures and services offered through the ESA program.

Work for the 2022 LINA commenced in January 2021 with Evergreen Economics as the selected consultant. A public workshop was held in March 2021 to present the draft research plan and solicit public comments, which were incorporated to produce the final research plan. The consultant then began planning for quantitative and qualitative data collection. The following methodology and data analyses were employed to better understand the energy-related needs of rental households:

- Analysis of secondary data to provide an overall characterization of the low-income market in California. These data sources include 2019 Census data, 2019 Athens Eligibility Estimates, and data from the 2019 and 2009 Residential Appliance Saturation Surveys (RASS).
- A phone/email survey with a sample of rental customers (n=1,127) residing in single-family homes as well as small, medium, and large multifamily homes. This provided a broad understanding of specific needs and differences in needs based on housing type and program opportunities.
- Semi-structured phone interviews with a sample of renters from the phone/email survey (n=40). This activity provided additional details and explanations of energy needs among the sub-population of renters.
- Surveys with a small number of ESA contractors to obtain their perspectives on barriers associated with property owners of rental properties.
- Synthesis of primary and secondary data in conjunction with program and policy guidelines to understand relevant opportunities within different types of low-income rental households.

[26] The LINA Study is mandated to be completed every three years per AB 327 and PUC Sec. 382(d).

A second public workshop was held in October 2022 to collect stakeholder feedback on draft study findings. The final report[27] was published in December 2022 with the following high-level recommendations that are currently being incorporated into program targeting and outreach strategies, and will be used to inform future ESA program design. For instance, in response to recommendation #2 below, starting in Q3 2023, PG&E plans to make available to ESA contractors, postcards with information alerting property owners that their rental property may be eligible for free energy upgrades with the ESA program. Contractors will be able to order these materials as needed, and share with property owners on the renter's behalf. The postcards will include the contractor's contact information.

- Prioritize single-family renters over multifamily renters for the ESA program.
- Develop outreach strategy that engages renters and property owners simultaneously, and communicates to renters that the program will work with the landlord on their behalf.
- Modify program outreach messaging to leverage specific sub-population findings – to emphasize ventilation and pollution protection benefits and potential bill reduction benefits resulting from HVAC-related measures.
- Increase program outreach to rental households with seniors, disabled residents, or a larger number of residents. Update program marketing materials to emphasize health benefits of HVAC-related measures, particularly for homes with seniors and/or members with health issues.

Aside from the main findings planned for the study, lessons learned in terms of outreach strategies to this subset of customers were realized through the large-scale phone survey. When the survey first launched in November 2021 across the IOU territories, participation rates were lower than expected, and it was unclear whether the survey quota of 1,000 would be fulfilled. To mitigate this issue, the study consultant sent out an advanced letter (on CPUC letterhead with contact name and phone number provided) to pre-selected survey participants, and provided customers with a $25 gift card after survey completion. The incentive, along with the revised outreach strategy lending credibility to the survey, proved to be effective and resulted in a steady uptake in survey completions – close to 1,000 over three months.

Multifamily Common Area Measures (MF CAM) Process Evaluation

A process evaluation for the MF CAM Initiative commenced in July 2021 with Resource Innovations, Inc. as the selected consultant. The study has the following objectives: (1) Assess the relative effectiveness of the IOUs' MF CAM outreach, delivery, and implementation strategies; (2) Identify what data currently exist and may be needed to facilitate more reliable evaluations of program impacts and; (3) Inform future program designs targeting the income-qualified multifamily sector.

A thorough research plan was developed to guide the process evaluation, and was presented to stakeholders for review and comments. The comparison and assessment of the IOUs' current MF CAM outreach, delivery, and implementation strategies, were informed by:

[27] 2022 Low Income Needs Assessment (LINA) Study - Final Report and Appendices. Evergreen Economics, December 2022. CALMAC Study ID: SCE0469.01. https://www.calmac.org/publications/2022_LINA_Report_120922_FINAL.pdf

- Framework of the Initiative as expressed by the MF CAM program logic model.
- The IOUs' implementation approaches as captured by each IOU's process flow diagram.
- The experience of participants as summarized in the participant journey maps.

A program logic model was developed for the MF CAM Initiative through program materials review and in-depth interviews (IDIs) with the IOUs, program implementers, SPOCs, and ED. Together with the participant surveys and IDIs, they informed the development of process flow diagrams and program participant journey maps.

A web-based survey was used to collect data to assess tenant awareness of the initiative, perceived benefits, and tenant satisfaction. The survey outcome informed recommendations addressing metrics to quantify tenants' benefits, including health and safety-related impacts. Performance metrics were defined and an impact evaluation approach was devised based on outcomes of the previous activities.

Three public workshops were held throughout the process evaluation to collect stakeholder feedback and share the draft research plan, interim findings, and draft results, respectively. The final report[28] with detailed findings was published in October 2022; a summary of high-level findings is included as follows:

- Delivery and Implementation Strategies: The IOUs employed different program designs and approaches to implement the MF CAM Initiative. The substantial differences in implementation approaches stem from the allocation of roles and responsibilities. This ranges from maximizing participant flexibility by allowing them to select and retain the installation contractor (PG&E's approach), to a turn-key experience for participants as the IOU assumes responsibility for the entire treatment process (Southern California Gas Company's approach), while SCE and SDG&E's implementation approaches balance both IOU involvement and outsourcing. Each presents unique challenges and benefits for the participant (property representative).
- Participant Experience: Some potential participants were reluctant to participate due to unclear program eligibility rules, the unknown length of time required for the project, and upfront cost of participation. The opportunity to receive no-cost EE upgrades and the potential energy and bill savings ultimately persuaded these participants.
- Tenant Awareness and Benefits: Nearly 50% of the tenants reported they were aware of the MF CAM Initiative and subsequent upgrades. In general, tenants reported limited benefits from the Initiative. A more rigorous assessment comparing perception before and after the project is recommended to better assess tenant health, comfort, and safety for future programs and initiatives.

Overall findings and recommendations are currently being incorporated into MFWB evaluation and implementation planning. These include identifying the appropriate point of participant contact during program implementation, understanding their role in different program processes, and conducting surveys with participants as close to project

[28] MF CAM Process Evaluation - Draft Report. Resource Innovations, September 2022. https://pda.energydataweb.com/#!/documents/2709/view

completion as possible – with the goal of continuously identifying process improvements and adjusting program processes accordingly.

In parallel, a similar approach will be employed to gauge tenant feedback and program perception, which includes collecting tenant contact information during program implementation, and conducting pre- and post-treatment surveys to establish baseline and assess health, comfort, safety benefits realized through the program. In addition to leveraging the participant and tenant survey tools to improve program effectiveness, data collection mechanism will be assessed and established early on during program implementation to properly plan for the upcoming impact evaluation, especially given the known challenges with meter mapping in multifamily properties.

1.8.2. If applicable, submit Final Study Report describing: (1) overview of study; (2) budget spent vs. authorized budget; (3) final results of study; and (4) recommendations.

The LINA and the MF CAM Process Evaluation were completed in 2022; final reports are available at the websites referenced in Section 1.8.1. See Appendix A of this report: ESA Table 15 – ESA Expenditures for Pilots and Studies for 2022 study budgets and expenditures.

1.9. Pilots

1.9.1. For each Pilot, provide (1) a summary describing the activities undertaken in the study since its inception; (2) the study progress, problems encountered, ideas on solutions; (3) the activities anticipated in the next quarter and the next year; and (4) status of Pilot Evaluation Plan (PEP).

An overview of ESA Pilot Plus and Pilot Deep (the Pilot) can be found in Section 1.1 – Energy Savings Assistance Program Overview. A description of the distinguishing pilot design elements follows:

Data-Driven Customer Targeting
The Pilot builds upon the ESA program's success in leveraging PG&E customer attributes to inform outreach campaigns. The Pilot additionally focuses on energy consumption characteristics. See Section 1.2.1.1 for details.

The Pilot began outreach in 2022 in California Climate Zones 11 and 12 (spanning from Butte County south to Merced County).[29] These areas were chosen due to the high heating and cooling demands observed in those regions. Additional climate zones may be considered in later years of the Pilot's multi-year implementation.

Deep Energy Savings Through Whole-Home Performance
The Pilot focuses on achieving deeper savings per home treated. To realize this goal, the Pilot takes a whole-home approach to assessing and selecting energy savings opportunities, meaning all home systems affecting home energy performance will be considered in prioritizing treatment options. Building science principles will be

[29] Information about California Climate Zones available at https://www.energy.ca.gov/programs-and-topics/programs/building-energy-efficiency-standards/climate-zone-tool-maps-and

incorporated into the assessment, which will often result in the building envelope being prioritized for treatment, and mechanical and end-use treatments being added in the optimal combination to maximize energy savings per home. Since the Pilot is operating initially in Climate Zones 11 and 12, these envelope improvements are important in improving the home's resistance to extreme heat and cold, and reducing the demand for heating and AC.

Pilot Measures:
PG&E and the Pilot implementer have established an initial measure list, consisting of all current ESA Main program measures as well as several new measures unique to the Pilot. The measure package each customer receives will be customized to their home's unique opportunities. The Pilot has adopted the feasibility criteria within the ESA California Installation Standards Manual in large part, with specific exceptions noted in program documents agreed to by PG&E and the Pilot implementer (such as for new measures not offered by ESA). As with the ESA Main program, some measures may be infeasible to install due to health, safety, or code compliance concerns.

Energy Modeling
Various treatment options will be explored by the Pilot implementer for each project, utilizing energy modeling software. The software is used during an advanced home energy assessment, collecting information about the home structure, usage, occupancy and more. The software generates a baseline energy usage profile,[30] which is calibrated against the customer's actual energy usage – an important step taken to improve the base assumptions utilized in creating both the baseline and the energy savings estimate. Additionally, the home assessment and energy modeling will be conducted by Pilot implementation team members with Building Performance Institute (BPI) certification or similar industry specialization.

Persistent Energy Savings
While the Pilot implementer conducts the initial home assessment, energy modeling, and measure package selection, the installation work will be performed by licensed contractors (similar to the ESA program). However, another distinguishing feature of the Pilot is the emphasis on performance testing. Unlike the ESA Main program which reports deemed, or prescribed, energy savings values, the Pilot will report energy savings estimates resulting from the specific measure packages installed.

Performance Testing
First, the Pilot implementer or their quality assurance subcontractor will perform on-site performance testing, taking measurements of the installed improvements, such as duct leakage, whole-home air leakage, quantity and quality of insulation, proper operation of appliances, and natural gas appliance testing, among others. Additional improvements will be made during installation until performance thresholds are met. The final measurements will be used to update, if necessary, the energy model to calibrate the estimated savings to the measured performance of the improvements.

Monitoring
Second, the Pilot will monitor (with consent) the customer's actual consumption for at

[30] The software generates several home energy usage simulations based on the inputs, which are then compared to the customer's past 12 months of gas and electric energy usage to determine the best matching profile. The resulting match is a simulated 12-month energy usage baseline, from which energy savings scenarios can be simulated for various energy savings packages.

least 12 months following installation. This utility meter-based energy measurement approach allows for timely monitoring, review, and subsequent intervention should customer energy usage deviate from the simulated energy improvements developed in the energy modeling tool. Subsequent interventions may range from informational tips (tailored to the customer, or seasonal) to retreatment.

Meter-Based Usage Analysis
After 12 months of data is collected, the Pilot implementer's analytics subcontractor will generate energy savings estimates, adjusted to weather and control groups, through a process known as Normalized Meter-Based Energy Consumption (NMEC). The 12-month post-treatment NMEC savings will serve as a feedback loop to continually improve Pilot offerings. The meter-based energy savings approach also allows the Pilot to more closely align Pilot goals and performance with the customers' realized energy and bill savings.

Electrification
PG&E plans to offer approximately 11% of participating customers the opportunity to electrify their entire home. In these cases, the Pilot will move select customers from natural gas to electric appliances where both fuel sources are provided by PG&E. As an aspect of this deep-savings Pilot, all homes receiving electrification will also be targeted to achieve 5% or more annual net energy savings.

Summary of Activities Occurring in 2022

Guidance Documents
Pilot implementation began in July 2022 with PG&E and the Pilot implementer developing guidance documents. Pilot guidance documents were adopted prior to beginning home treatments. It is expected they will be updated throughout the course of the Pilot. A summary of guidance documents follows:

- The Marketing Implementation Plan, prepared by the Pilot implementer, established the customer outreach strategy, resource needs, priorities, and timeframes to initiate various outreach campaigns.
- The Pilot Implementation Manual, also prepared by the Pilot implementer, serves as the central source of key operational and policy decisions guiding the Pilot implementation. Included within are guidelines on field operations, quality assurance/quality control procedures, safety, measure eligibility, customer engagement, and more. The manual largely aligns with the ESA Statewide Policies and Procedures Manual, but serves as a stand-alone guide to Pilot implementation, particularly where guidelines are needed for new or different approaches unique to the Pilot, and in cases where exceptions are made to the statewide manual.
- A measurement and verification plan was also developed to establish agreement and common understanding among PG&E and the Pilot Implementer regarding methods for tracking, analyzing and reporting energy savings.

Recruitment and Training
The Pilot implementer began recruiting and onboarding implementer staff, implementation partners, and installation subcontractors in July 2022. By the end of 2022, two implementation partners – one responsible for field quality control and training, another for analytics – and three installation subcontractors were successfully onboarded. The implementer partnered with PG&E to obtain NGAT procedure training for field managers, energy auditors and quality control staff, in addition to obtaining BPI

certification. Additional training and resources are available to workers through the Pilot implementer's online trade ally portal, and PG&E's WE&T program.

Information Systems

Other work necessary to operate the Pilot took place prior to commencing the first customer installation project. PG&E provisioned a program database and the Energy Insight (EI) project workflow tool augmented to support the Pilot's implementation model, and provided the Pilot implementer training on its usage, including steps to refer customers to the ESA Main program when not eligible for the Pilot's offerings. This tool will also be used to coordinate PG&E project inspections through its Central Inspection Program (CIP). The Pilot implementer also established its information systems, such as Pilot-specific financial tracking tools, a customer relationship management tool for outreach and engagement tracking, the trade ally portal previously mentioned, and began work on program management dashboards for visualizing metrics. The Pilot implementer also provisioned the previously mentioned energy modeling tool, and provided PG&E access and insights on the tool to enable PG&E's quality assurance review of select projects.

Resource Leveraging

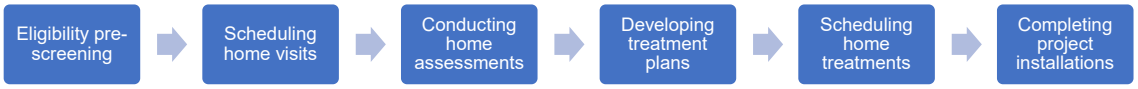
In an effort to manage cost, the Pilot leveraged existing resources where possible. Examples include the previously mentioned EI tool (augmented slightly from an existing workflow), PG&E customer call center teams who were provided resources to help direct customer calls about the Pilot, and PG&E's website where a FAQ page about the Pilot was published. The Pilot also leveraged PG&E's WE&T resources, such as ESA Program Onboarding training, NGAT training at the Stockton Energy Training Center (ETC), and access to the WE&T schedule of no cost technical training for Pilot workers. The Pilot Implementation Manual was streamlined regarding measure feasibility standards because the Pilot adopted the ESA California Installation Standards Manual (CISM). Some specific exceptions are made to the CISM, documented in the Pilot Implementation Manual as stand-alone standards, along with new feasibility standards for measures unique to the Pilot. The Pilot also leveraged the ESA program's enrollment forms, except for the Home Assessment Form, which is replaced by the Pilot implementer's energy modeling tool's Treatment Plan template.

The Pilot leveraged, as much as possible, the tools and practices utilized by PG&E for customer outreach. For instance, the Pilot utilized the EI tool so customers are not contacted during an outreach campaign by multiple parties working for the ESA Main program and the Pilot. The Pilot also leveraged similar customer attributes as ESA Main program's outreach campaigns (although not in all cases, as an aspect of experimental design). Leveraging existing PG&E data also reduced the need to source data from third parties. The Pilot also leveraged the ESA logo and name, and PG&E's marketing department's expertise on materials development and customer engagement strategies.

The Pilot also leveraged PG&E's experience from implementing other pilots, and the Pilot implementer's experience implementing other programs. For instance, following the implementer's development of a supply chain risk assessment (in light of the 2021-2022 supply chain shortages), PG&E and the Pilot implementer conducted a knowledge sharing session with PG&E's SJV DACs pilot[31] program manager to improve the Pilot's resilience to supply chain challenges. As a result, the Pilot implementer established a procurement agreement with local suppliers.

[31] The SJV DACs Pilots were authorized in 2018 through CPUC D.18-12-015. PG&E administers these Pilots in several communities. Lessons learned from these Pilots may be applicable to PP/PD.

Ramp-Up Period
PG&E intends to learn as much as possible about the feasibility of deep energy savings prior to the next ESA program cycle. PG&E and the Pilot implementer planned a steep ramp-up timetable allowing for project installations to begin by end of 2022, and aiming to achieve full capacity by 2023. To manage the many tasks associated with ramp-up, PG&E and the Pilot implementer adopted a *Launch Readiness Plan*. This plan served as a phased implementation timetable, allowing both parties to communicate the status of each phase and determine current capacity to implement any given phase of ramp-up. The plan allowed parties to focus efforts on the most critical tasks necessary to proceed to the next ramp-up phase, while also planning ahead for the subsequent phases. The plan started with tasks necessary to begin outreach, then progressed through the following phases associated with ramp-up activity:



All phases of the Launch Readiness Plan were fully completed by mid-December 2022, prior to commencing the first installation project.

Lessons Learned/Opportunities for Improvement
Given the short implementation timeframe in 2022, there are few lessons learned to report at this time. Customer targeting and outreach occurred ahead of other phases of implementation, so these early phases comprise the most notable lessons learned in 2022. PG&E intends to track and address lessons learned throughout the entirety of the Pilot.

Lesson Learned #1: Add Customer Attributes to Customer Targeting
One of the first lessons learned occurred in establishing the new energy usage-driven targeting efforts. The customer targeting effort was originally conceived by the Pilot implementer as a combination of energy consumption data provided by PG&E and demographic and need state information available through public and third-party sources. PG&E in its ESA Main program utilizes customer attributes sourced from customer records to inform outreach campaigns. The Pilot design was adjusted to accommodate more PG&E customer attributes, though the relatively late adjustment resulted in under 10% of customers selected for targeting in 2022 utilizing the combined method. Additional adjustments will occur in early 2023 to incorporate PG&E-sourced customer attributes into the core of the customer targeting strategy. This may improve the incorporation of customer need-state information above and beyond what was used in 2022.[32]

Lesson Learned #2: Pilot Offerings May Sound Too Robust to be Believed
While the Pilot is still early in its implementation lifecycle, early results from outreach provided insights on the new tactics being implemented. Most notably, responses to email and direct mail campaigns were trending below industry averages. While additional time in the market might improve response rates through repetition, name recognition, and possibly word-of-mouth, it is also possible that the below average responses are due in part to customer skepticism (i.e. the offer sounding too good to be true). This challenge was predicted in advance, based on lessons learned from the SJV DACs

[32] See ESA Table 17 – Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions.

Pilots.[33] In July 2022 PG&E launched an informational website on www.pge.com, including information about the Pilot, the implementing parties, and answers to frequently asked questions.[34]

However, more can be done to ensure customers trust the validity of Pilot offerings. In November 2022, PG&E added a direct link from the PG&E webpage to the Pilot implementer-hosted webpage, providing additional validation of Pilot offerings and outreach materials. Analysis of page views by the Pilot implementer determined that a significant number of customers visiting the implementer's Pilot webpage were originating from the PG&E webpage.

Opportunities for improvement in 2023 include:

- Further enhancements to the Pilot webpages, outreach materials, and intended customer journey to emphasize the validity of Pilot offerings, including PG&E's role in administering the Pilot.
- Additional forms of validation such as partnerships with local CBOs, and utilizing PG&E-branded outreach materials similar to main ESA outreach campaigns.

Planned Activities for 2023

Ramp-up to Full Capacity:
PG&E intends for the Pilot to reach full capacity on a month-over-month basis in 2023. Customer targeting and outreach will remain the priority in Q1 2023. As the Pilot builds the pipeline of interested participants, the objective is to reach a regular monthly project count representative of the Pilot's full capacity. Reaching full capacity will allow for stabilization of key operations such as customer targeting, outreach, customer enrollment, home assessment, installation and post-treatment monitoring and engagement.

Evaluation Planning:
Because the Pilot is still early in its journey to full capacity, 2023 also presents an opportunity to finalize experimental pilot design elements to ensure the Pilot is capable of being evaluated effectively, maximizing possible learnings. Detail is provided in the following section.

Other milestones anticipated for Q1 2023 include the Pilot implementer's first workforce survey, an initial partnership report, and implementation of the customer post-treatment survey.

While efforts to initiate meter-based energy savings analysis will begin in 2023, PG&E does not expect this operation to yield results until 2024, due to the need to evaluate a full year of post-treatment energy usage.

[33] See PG&E 2022 Annual Report on SJV DACs Pilots, p. 23, available at: https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M500/K050/500050133.PDF

[34] PG&E's customer service call centers also provide validation of Pilot offerings.

Status of Pilot Evaluation

The Pilot continues to operate under the guidance of the high-level evaluation plan included within the *Pilot Implementation Plan*.[35] PG&E plans to select an evaluation consultant in 2023 once the Pilot has reached a period of stabilization and all major pilot design elements have been finalized. Since the pilot design was not specified until after the third-party pilot design and implementation solicitation was finalized, PG&E did not have sufficient information about the pilot design to develop a clear scope of work for an evaluation consultant in 2022. PG&E intends to select a qualified evaluation consultant familiar with all aspects of the unique pilot design.

In the interim, guidance documents drafted in 2022 such as the *Pilot Implementation Manual* and the *Measurement and Verification Plan* provide clarity about the pilot design, and will serve as resources to the eventual evaluation consultant. Additional steps taken in 2022 to support a strong evaluation included developing an initial evaluability assessment, customer survey, and data collection plan. The evaluability assessment presents key questions the pilot seeks to answer, and guidance on how to implement the pilot to ensure the questions can be addressed. The customer survey will allow PG&E to begin customer data collection as projects are initiated. Finally, the data collection plan will ensure no data essential for the evaluation is omitted during the course of a project.

1.9.2. If applicable, submit Final Pilot Report describing: (1) overview of pilot; (2) description of PEP; (3) budget spent vs. authorized budget; (4) final results of pilot (including effectiveness of the program, increased customer enrollments or enhanced program energy savings); and (5) recommendations.

There are no Final Pilot Reports to submit for 2022.

1.9.3. Virtual Energy Coach Pilot – For each Pilot, provide (1) a summary describing the activities undertaken in the study since its inception; (2) the study progress, problems encountered, ideas on solutions; (3) the activities anticipated in the next quarter and the next year; and (4) status of Pilot Evaluation Plan (PEP).

D.21-06-015 approved PG&E's concept proposal for a "Virtual Energy Coach" (VEC), a new pilot program designed to evaluate the impacts of personalized communications on customer behavior in the income-qualified market.[36] The VEC pilot program kicked off in December 2021 to develop a platform that could help encourage on-going energy savings, optimal residential rate selection and participation in a variety of programs while inspiring changes in energy usage behavior. PG&E selected a third-party vendor to design and launch the program, and set forth a shared scope of work with an executed contract in Q4 2021.

In March 2022, the VEC program moved into the design and planning phase to define program features, software functionality, customer journey, data sharing and data capture. As the program was concluding the design phase in August 2022, the vendor informed PG&E that the contract could no longer be fulfilled because the software

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[35] See PG&E AL 6412-E / 4530-G available at: https://www.pge.com/tariffs/assets/pdf/adviceletter/ELEC_6412-E.pdf

[36] D.21-06-015, at pg. 381.

functionality would not support the customization required to meet the program objectives. In September 2022, activities began to terminate the vendor contract and identify what alternatives for the VEC Pilot Program may exist.[37]

In Q4 2022, PG&E began exploring other avenues beyond VEC to provide customers customized communications that could help alter behavior and increase program participation. For example, since D.21-06-015 was issued, PG&E has been developing a general market Energy Action Guide program which may be customizable for Income-Qualified Programs and Disadvantaged Community (IQPDAC) customers. To illustrate, the IQPDAC section would promote programs to support energy and bill savings, as well as host personalized energy education material. PG&E has placed the VEC pilot program on hold while alternatives to achieve the same end and test the impact of customized communications and tools, at less ratepayer cost, are assessed. PG&E anticipates informing stakeholders, including the ESA WG, and the ED, of its determination related to the VEC concept in 2023.

1.10. ESA Working Groups (WG) and Sub-working Groups (SWG)

1.10.1. Please provide a brief background on each WG and SWG.

D.21-06-015[38] established the mandate for implementing the ESA WG with a list of required tasks and actions.

In 2022, the IOUs responded to D.21-06-015 by organizing the ESA WG functions into three SWGs and ESA WG Council. In December 2022, per D.22-12-029, the ESA WG added the CARE/FERA PEV SWG to expand the three SWGs from three to four:

- ESA Program Cost-Effectiveness SWG (CE SWG),
- ESA Program Policy and Procedures (PP) and Installation Standards (IS) Manual SWG (PP&IS SWG),
- UAS SWG, and
- CARE/FERA PEV SWG.

Overall, the ESA WG Council performs the following functions:

- Oversees ESA WG and SWGs,
- Address cross-cutting program concerns beyond the ESA program,
- Coordinate activity with ESA/CARE Study Group,
- Manage the Response-to-Recommendation (RTR) process, and
- Manage the Facilitation Team.

While ESA WG strives to encourage consensus on all topics, when consensus is not possible, the ESA WG will move forward with the majority while documenting the disagreements. These disagreements and open items are tracked into a parking lot document maintained by the facilitators. In addition, all ESA WG meeting material, notes,

[37] The VEC vendor has agreed to refund to PG&E all payments made under VEC program development, thereby ensuring that no ratepayer dollars were used in developing the partially completed pilot.

[38] D.21-06-015, p. 413, Section 10.2.2.1.

and actions are posted to the CPUC public site for public access (https://pda.energydataweb.com).

To improve communication within the ESA WG and SWG, a Basecamp system is implemented for all members to post discussions and coordinate interim work products. In addition, all non-public working session meeting notes, actions, and interim deliverables are posted to the members-only Basecamp. All ESA WG and SWG's draft deliverables are posted to the CPUC public site to collect public feedback. The final deliverables are posted to the CPUC public site to support transparency.

1.10.2. What were the accomplishments of each WG and SWG in the 2022 PY?

2022 Energy Savings Assistance (ESA) Working Group

In 2022, ESA WG and ESA WG Council established the process and procedures necessary to administer the ESA WG infrastructure, including developing charter statements, governances, and Conflict of Interest disclosure statements. The non-IOU ESA WG members are encouraged to support a minimum of two SWGs to ensure continuity and consistency within ESA WG and SWGs. In addition, the five-member ESA WG Council met monthly to plan and address open issues.

By the end of 2022, ESA WG retained eight non-IOU members. In addition, with the support of the ESA WG co-chairs, the ESA WG completed eight statewide public meetings to engage ESA WG IOUs, non-IOUs member organizations, and the public.

While the SWGs support ESA WG, there are additional tasks within the ESA WG charters to support ESA program operations and improvements. These activities are incorporated into the ESA WG agenda to encourage public discussions for summer DR responses, program implementation progress, unspent program budgets, the Low Income Oversight Board (LIOB) liaison activities, and other ongoing program improvement concerns.

2023 Cost Effectiveness Sub-Working Group

Per D.21-06-015[39], the Cost Effectiveness (CE) SWG scope is to provide recommendations on cost-effectiveness test considerations via a progress report no later than the end of Q1 2023, and also provide recommendations on the Non-Energy Benefits (NEBs) study and stakeholder process via a progress report no later than December 31, 2022. Selected ESA WG Members and non-members supported the CE SWG to ensure project consistency and continuity. In 2022, the CE SWG initiated two tasks - Task 1: Cost-Effectiveness Test Considerations and Task 2: NEBs Study and Stakeholder Process.

In 2022, the CE SWG completed Task 2 as required. This SWG conducted many bi-weekly meetings with members to discuss relevant concerns to support the successful completion of Task 2.

Policies and Procedures & Installation Standards (PP&IS) SWG

The scope of the Policies and Procedures & Installation Standards (PP&IS) SWG is to incorporate timely updates to the PP&IS manuals to support program implementation.

In 2022, the PP&IS SWG requested that the ESA WG delegate the technical tasks to this

[39] D.21-06-015, pp. 491-492, OPs 85 and 86.

SWG for resolution. Selected ESA WG members support the PP&IS SWG to ensure ongoing project consistency and continuity. In addition, PG&E engaged RHA as the consultant to update the documentation of the PP&IS manuals and assess the Human-Body Model (HBM) requirements. These PP&IS updates are an iterative process based on program implementation needs over regular intervals.

In 2022, this working group completed the following tasks:

- The Statewide ESA Program 2021-2026 Cycle PP Manual update and the Summary of Statewide ESA Program Policy & Procedures Change documentation.
- The final version of the ESAP IS Manual (Version 1.1), including HBM requirements and the Summary of Statewide ESA Program Installation Standards Change documentation.
- The final ESA Main program measure offering modification protocol.

Universal Application System (UAS) SWG

D.21-06-015[40] ordered the IOUs to set up a Universal Application System (UAS) WG, as part of the overall ESA WG, to complete the assigned tasks that include the UAS' purpose, goals, requirements, and intra- and interagency solutions and alternatives.

The UAS SWG successfully filed the *Universal Application System Sub-Working Group Recommendation Report* on July 1, 2022. By year-end, the UAS SWG delegated its charter back to the ESA WG Council to terminate its charter.

CARE/FERA Post-Enrollment Verification (PEV) SWG

In December 2022, D.22-12-029[41] ordered the IOUs to form a SWG under the ESA WG, within 60 days of the issuance of the decision, to focus on improving the income verification procedures and policies, with the ED having the ability to periodically update the scope of the WG's role and resolve potential disagreements among stakeholders. The scope of the CARE/FERA Post-Enrollment Verification (PEV) SWG includes developing recommendations that could be implemented in the current program and proposed in the next program application cycle, developing recommendations for additional reporting requirements in either IOU monthly or annual CARE/FERA reports to include data on arrearage and disconnection rates for customers removed from CARE/FERA due to non-response during recertification or PEV compared to other classes of customers, and exploring the CalFresh Confirm Hub tool and other data-sharing partnerships to verify customer income eligibility before requesting recertifications and PEV.

ESA/CARE Study Working Group (WG)

D.21-06-015 authorized the formation of a statewide Study WG for the ESA and CARE programs.[42] The Study WG exists outside of the ESA WG structure. Assigned tasks of the Study WG include planning and designing statewide studies and related research for the ESA and CARE programs and providing feedback on study deliverables.

In 2022, working group members provided scoping and budget inputs on the Categorical

[40] D.21-06-015, pp. 480-481, OP 45

[41] D.22-12-029, pp. 20-21, OP 2 and OP 3.

[42] D.21-06-015, OP 176.

Eligibility Study, the upcoming NEBs Study and MFWB Process Evaluation, and two SCE Clean Energy and Electrification pilot evaluations. The working group also discussed evaluation planning for the rest of the program cycle.

1.10.3. What are some of the goals for each WG and SWG in PY 2023?

2023 ESA Working Group

For 2023, the ESA WG will update its membership roster to include 11 non-IOU members, update co-chairs, and update ESA WG Council members. In addition, an update to the Conflict-of-Interest statements is currently pending. A few non-IOU members are dedicated to the CARE/FERA PEV SWG only, but most non-IOU members will continue to support a minimum of two SWGs to ensure consistency and continuity with ESA WG actions.

In 2023, ESA WG is scheduled to host eight public meetings, one dedicated to discussing CARE/FERA PEV SWG's recommendations. In addition, the ESA WG public meetings are expected to expand to cover RTR from the published income-qualified studies to pursue ongoing program operation and improvement efforts.

2023 Cost-Effectiveness Sub-Working Group

In 2023, the IOUs are required to complete Task 1 by March 31, 2023 and will then submit a Joint Tier 1 AL informing the Commission of the necessary steps to begin the NEBs study and how the recommendations from Task 2 of the CE SWG will be incorporated.

Afterward, the CE SWG may delegate its scope and charter back to the ESA WG to wind down the CE SWG in 2023. Later, the ESA WG Council will have the option to reconstitute another CE SWG as needed.

2023 Policies and Procedures (PP) and Installation Standards (IS) SWG

Starting in 2023, the PP&IS SWG is working on the following tasks:

- Develop MFWB PP documentation,
- Develop standards for new ESA Main program measures modifications,
- Continue to update a series of ESA program PP Attachments to maintain consistency between PP and IS manuals,
- Address miscellaneous ESA Main and ESA MFWB technical, measure, and installation issues, and
- Participate in the IOUs mid-cycle reporting development and filing.

2023 Universal Application System (UAS) SWG

On January 26, 2023, the CPUC issued a ruling requesting additional UAS information and actions. As a result, the UAS project scope is amended to address the implementation of SB 1208 and the potential funding needs relating to the implementation of the concurrent application process system (CAS).

2023 CARE/FERA Post-Enrollment Verification (PEV) SWG

In 2023, the IOUs are ordered to form a CARE/FERA PEV SWG and meet specified milestones and deadlines in D.12-22-029, consistent with the ESA WG structure and governance; hold a public meeting in August 2023 to discuss its recommendations and to seek public input, and incorporate its recommendations into the IOUs mid-cycle report.

ESA/CARE Study Working Group
In 2023, the ESA/CARE Study WG will continue to provide deliverable reviews and scoping inputs, and leverage research and analysis to shape future program design.

1.11. Annual Public ESA-CARE Meeting

PG&E and the other IOUs held a public forum via Microsoft Teams during the July ESA Working Group Monthly Meeting on July 28, 2022.[43] The IOUs presented an overview of their 2022 ESA Main, ESA CAM, CARE and FERA results, highlighting outcomes and lessons learned from 2022 that are applicable to 2023 and future program years. The public meeting provided an opportunity for stakeholder questions and discussion.

1.12. Multifamily Properties (Analysis of Non-Deed Restricted Properties)

1.12.1. The IOUs shall conduct and report an annual analysis of the square footage, energy consumption, ESA program participation. Please include the breakdown of market rate and deed restricted properties treated.

Introduction and Methodology
PG&E has contracted with ResIntel since 2020 to report on the number of multifamily properties and the characteristics of income-qualified residents residing at those properties for the PG&E service territory. Residents are classified as income-qualified if they are currently enrolled in ESA or if a predictive model classifies them as ESA eligible. The model generates a predicted number of ESA eligible residents per property based on a number of property-level variables. These variables include property value and location, current ESA participation[44], and those assigned at the census block level, such as median income, ethnicity, and average household size.

Multifamily properties are identified from county tax assessor records, which include parcel records for multifamily properties. Res-Intel aggregated parcel records and supplemented them with CoStar property data to arrive at a final dataset of multifamily properties in the PG&E territory. The number of buildings and units at each property is often documented within these databases. However, when these data were missing from existing records, they were imputed using predictive modeling, satellite imagery, and Light Detection and Ranging (LiDAR).

ResIntel identified current ESA participation at each of the multifamily properties by merging PG&E's premise IDs to the property dataset, along with Axciom customer demographic data provided by PG&E. Premise IDs were merged based on premise addresses and geospatial coordinates. The final dataset features an array of physical and demographic attributes for each individual property and a detailed profile of each property's energy consumption and utility data.

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[43] D.12-08-044 ordered the IOUs to convene a minimum of one public meeting per year, within 60 days of their filing of the annual report, and other public meetings as deemed necessary by the IOUs, the ED, the Administrative Law Judge, or the Commission.

[44] Res-Intel determined ESA participation and eligibility using three methods: (1) identifying CARE eligible premises using data provided by PG&E; (2) identifying ESA eligible premises using Acxiom demographic data on household size and income; and (3) predicting eligibility based on premise characteristics where CARE status and household income are unknown.

The analysis also disaggregates common area and tenant energy consumption. This disaggregation is achieved by classification of each meter using its available metadata. The indicator of whether a PG&E meter is assigned to common area is the dwelling type field that appears for each service point record in PG&E's database. A meter is labeled as a common area meter whenever the dwelling type field takes on the value "common area."[45]

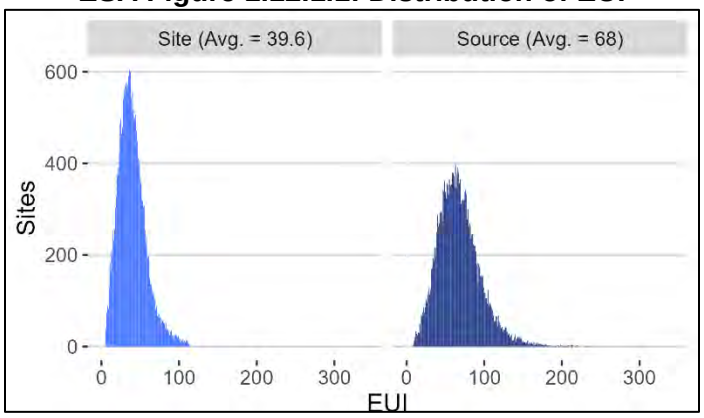
Previous versions of this analysis can be found in the PY 2020 and PY 2021 ESA Annual Report. Results contained in the current analysis differ from previous results for two reasons. The first reason is that the 2022 property inventory has changed in three ways: (1) Res-Intel has updated the property inventory of multifamily 5+ unit sites in the PG&E territory using new CoStar, assessor, and building footprint data; (2) Property inventory results have changed slightly due to new data and improvements made to Res-Intel's aggregation methods for multi-parcel developments; (3) MF 5+ unit properties have also been redefined to include only properties with five or more units that share a common ceiling or wall (i.e. attached properties). The properties that remain under this new definition constitute a subset of the properties that were identified under the old definition.

The second reason is that ESA eligibility standards have changed. Under previous ESA standards, premises were ESA eligible if they were CARE eligible, either by household income or categorical criteria. Earlier household income requirements were based on having a household income below 200 percent of the Federal Poverty Level (FPL). Current ESA eligibility standards are based on household income below 250% FPL. As such, greater ESA eligibility is observed in the current analysis compared to previous years.

Results

Figure 1.12.1 shows distribution of Site and Source Energy Use Intensity (EUI) for the 23,274 attached multifamily 5+ sites that meet the criteria for benchmarking. Results from a prior analysis found that benchmarked sites had an average Site EUI of 42 and Source EUI of 72. However, previous results included all multifamily 5+ sites, regardless of whether each unit at the property shared a wall. Current results include only attached multifamily 5+ properties.

ESA Figure 1.12.1.1: Distribution of EUI



[45] For the PY 2021 version of this analysis, Res-Intel also classified meters as "common area" based on text analysis of the *business activity* field in the meter metadata, which describes each meter's specific end use.

Tables 1.12.1.1 and 1.12.1.2 compare PY 2022 ESA eligibility estimates (Table 1.12.1.1) with estimates from the PY 2021 analysis (Table 1.12.1.2). The tables include both actual and predicted ESA eligibility. As expected, due to more inclusive income requirements, a larger number of properties fall into the 80+ percent ESA eligible category compared to PY 2021.

ESA Table 1.12.1.1
Estimates of ESA Eligibility, All 5+ Unit Attached Multifamily (PY 2022)

	Deed Restricted			Non-Deed Restricted		
Eligible %	**Properties**	**Buildings**	**Units**	**Properties**	**Buildings**	**Units**
Less than 50	867	4,478	104,760	15,764	33,514	507,083
50 to 64	148	958	14,312	3,581	8,086	86,589
65 to 79	240	1,274	22,158	2,215	5,331	54,508
80+	1,252	5,889	87,106	4,417	8,788	77,737
Unknown	267	1,314	20,189	1,425	3,536	52,049
Total	**2,774**	**13,913**	**248,525**	**27,402**	**59,255**	**777,966**

ESA Table 1.12.1.2
Estimates of ESA Eligibility, All 5+ Unit Attached Multifamily (PY 2021)

	Deed Restricted			Non-Deed Restricted		
Eligible %	**Properties**	**Buildings**	**Units**	**Properties**	**Buildings**	**Units**
Less than 50	969	5,254	104,335	22,430	49,599	709,279
50 to 64	266	1,656	24,352	3,842	7,640	71,809
65 to 79	464	2,693	39,710	1,721	3,919	37,863
80+	643	3,336	40,407	1,813	2,777	21,760
Total	**2,342**	**12,939**	**208,804**	**29,806**	**63,935**	**840,711**

Table 1.12.1.3 breaks down the results of Table 1.12.1.1 by actual and predicted ESA eligibility. Actual eligibility is based on either (1) CARE enrollment, or 2) income eligibility, using Acxiom household data for each premise. The values in parentheses represent the change in the bin's value when predicted ESA eligibility is included. ESA eligibility values are unknown when the property does not have PG&E meters.

ESA Table 1.12.1.3
ESA Eligibility, Actual and Predicted (PY2022)

	Deed Restricted			Non-Deed Restricted		
Eligible %	**Properties**	**Buildings**	**Units**	**Properties**	**Buildings**	**Units**
Less than 50	903 (-36)	4,743 (-265)	108,415 (-3,655)	15,996 (-232)	34,224 (-710)	52,049 (-52,049)
50 to 64	154 (-6)	895 (63)	13,753 (559)	3,823 (-242)	8,706 (-620)	92,703 (-6,114)
65 to 79	304 (-64)	1,728 (-454)	27,418 (-5,260)	2,470 (-255)	6,202 (-871)	62,801 (-8,293)
80+	1,146 (106)	5,233 (656)	78,750 (8,356)	3,688 (729)	6,587 (2,201)	54,547 (23,190)
Unknown	267 (-267)	1,314 (-1,314)	20,189 (-20,189)	1,425 (-1,425)	3,536 (-3,536)	52,049 (-52,049)
Total	**2,774 (0)**	**13,913 (0)**	**248,525 (0)**	**27,402 (0)**	**59,255 (0)**	**777,966 (0)**

Tables 1.12.1.4 through 1.12.1.8 report statistics for the subset of Non-Deed Restricted (NDR) properties with 80+ percent eligibility. This subset includes 4,417 of the 5+ unit attached multifamily properties. Note that the total numbers of properties reported in Tables 1.12.1.4 and 1.12.1.5 are slightly less than 4,417 (as shown in Table 1.12.1.1) because two properties lack daily usage data.

Differences between the results presented in Tables 1.12.1.4 and 1.12.1.5 and their counterparts in the PY 2021 analysis can be explained by the following factors:

1. Differences in ESA-eligibility standards (increased income) affecting classification of 80+ Non-Deed Restricted properties.
2. Updates to Res-Intel's multifamily 5+ property inventory.
   a. Updated property data.
   b. Addition of new income-qualified properties.
   c. Changes to treatment of multi-parcel developments.
3. Yearly variation in electricity and gas usage.
4. Differences in samples of properties with common area, unit, and master meters.

ESA Table 1.12.1.4
Total PY Annual Electricity Usage, 80+ Non-Deed Restricted (MWh)*

Category	Number of Properties	Average Sq. Ft.	Total 2022 Annual MWh Consumption	Total 2022 Annual MWh for Common Areas	Total 2022 MWh for Units	Total 2022 Annual MWh for Master Meters
Sq. Ft. <99,999	4,332	12,817	276,012	13,094	262,918	2,790
Sq. Ft. >100,000	83	171,609	69,730	2,997	66,733	823
Total	**4,415**	**15,802**	**345,742**	**16,090**	**329,652**	**3,614**

*Annual sq. ft. totals averaged over January through December 2022. All other values are annual cumulative values.

Overall, PY 2022 results are comparable to those from PY 2021 when adjusting for the number of properties and average property size:

- The total number of properties in Table 1.12.1.4 is up to 4,415, compared to 1,771 in the PY 2021 analysis.
- Average property size is up to 15,802 square feet, compared to 11,276 square feet for PY 2021.
- Total annual MWh consumption for the 80+ NDR sites is roughly 2.7 times higher compared to PY 2021. This is consistent with the large increase in the number of properties and average property size.

Total annual gas usage has increased by similar proportions to electricity usage, accounted for by a greater number of 80+ percent NDR properties. The total number of properties in Table 1.12.1.5 is up to 4,415, compared to 1,693 in the PY 2021 analysis.

- Both the number of properties and total annual gas usage are 2.6 times higher compared to results from the PY 2021 analysis.

ESA Table 1.12.1.5 Total PY Annual Gas Usage, 80+ Non-Deed Restricted (therms)*						
Category	**Number of Properties**	**Average Sq. Ft.**	**Total 2022 Annual Therms Consumption**	**Total 2022 Annual Therms for Common Areas**	**Total 2022 Therms for Units**	**Total 2022 Annual Therms for Master Meters**
Sq. Ft. <99,999	4,332	12,817	14,833,865	13,094	262,918	2,790
Sq. Ft. >100,000	83	171,609	2,958,600	2,997	66,733	823
Total	**4,415**	**15,802**	**17,792,465**	**3,835,386**	**13,957,079**	**7,860,768**
*Annual sq. ft. totals averaged over January through December 2022. All other values are annual cumulative values.						

Table 1.12.1.6 presents average site-based EUI for the 80+ percent NDR properties. Due to the small numbers of properties in these groups, average EUIs can be affected by large outliers. However, as shown in Figure 1.12.1.1, results for the overall set of multifamily 5+ properties are similar to previous results.

ESA Table 1.12.1.6 Average PY 2022 Energy Use Intensity (EUI), 80+ Non-Deed Restricted kBTU sq/ft			
PG&E Service	**# of Properties**	**EUI (Average)**	**EUI (Median)**
Dual Fuel	3,805	50.1	45.7
Electric Only	302	24.4	22.8
Gas Only	308	43.4	31.6

ESA Table 1.12.1.7 Year of ESA Treatment, 80+ Non-Deed Restricted (as of 2022)*		
ESA Treatment Year	**# of Properties**	**# of Units**
2003	215	785
2004	359	1,461
2005	448	1,999
2006	481	2,327
2007	403	2,274
2008	419	1,806
2009	485	2,404
2010	708	2,544
2011	688	3,329
2012	723	2,741
2013	886	3,677
2014	958	4,020
2015	774	2,578
2016	539	1,765
2017	556	2,116
2018	624	2,582
2019	955	3,707
2020	766	2,294
2021	720	1,963
2022	**320**	**1,613**
*In 2022, ResIntel updated their methodology of identifying multifamily properties resulting in the difference in the number of properties and units reported for 2003 through 2021 from prior annual reports.		

ESA Table 1.12.1.8 Year of Most Recent Renovation, 80+ Non-Deed Restricted*		
Most Recent Renovation	**# of Properties**	**# of Units**
(1940,1990]	4	65
(1990,2000]	5	77
(2000,2010]	26	1,679
2010+	37	1,588
None Recorded	3,947	64,278
*Renovation records were retrieved from CoStar and do not account for all properties.		

Since the ESA program serves income-qualified households in PG&E's service areas, it does not provide treatment to market-rate multifamily properties. While PG&E did not perform common-area treatments for market-rate MF properties in PY 2022, PG&E treated 45 MF deed-restricted properties as part of the MF CAM Initiative. In addition, PG&E treated 9,454 MF homes as part of the ESA program (see Appendix A of this report: ESA Table 2 – ESA Main Expenses and Energy Savings by Measures Installed); this figure combines both market-rate and deed-restricted properties.

1.12.2. The IOUs shall describe the activities conducted in multifamily properties for multifamily common area measures under the ESA Program.

Please refer to MF CAM summary in Section 1.1.1 of this report.

1.12.3. Normalized Metered Energy Consumption (NMEC) Analysis of the Multi-Family Common Area Measures (MF-CAM) Initiative.

This report section is based upon a NMEC analysis for multifamily properties that received EE installations through the MF CAM Initiative. The CPUC requires that MF CAM savings be estimated using NMEC methods – which amounts to measuring savings at the meter using Advanced Metering Infrastructure (AMI) data. A key challenge in applying NMEC methods for MF CAM is correctly identifying all meters associated with EE interventions being installed in common areas.

PG&E contracted with Demand Side Analytics to conduct a NMEC analysis for properties treated through the MF CAM Initiative. The analysis requires 12 months of metered consumption data, prior to as well as after measure installation. As such, the analysis is conducted for properties treated between January 2021 and December 2021, with a minimum of 12 months of post-installation consumption data by the end of program year 2022.

133 properties treated by the MF CAM Initiative meet this requirement, with 123 sites reporting 6,000 MWh of deemed electric savings and 125 sites reporting 107,600 therms of deemed gas savings. There is a large overlap between the projects with gas and electric savings due to interactive effects, resulting from measures such as interior lighting upgrades. In fact, 68% of the program's electric savings are generated from LED interior lighting (Table 1.12.3.1).

ESA Table 1.12.3.1 Deemed Savings		
Measure Type	**Deemed Savings (MWh)**	**Deemed Savings (Therms)**
LED Interior Lighting	4,092	-70,799
LED Exterior Lighting	1,820	--
Heating & Cooling	13	44,173
Water Heater	9	133,714
Water Measure	44	413
Other	16	131
Total	**6,000**	**107,600**

A site-level NMEC analysis is applied to 120 electric sites and 112 gas sites, where the respective meters can be successfully mapped. Energy saving estimates are generated through six steps:

1. Identify a control group of MF common areas that did not participate in the program. This candidate control pool is composed of approximately 2,800 sites.
2. Generate indexes of hourly energy use for the average MF common area. These were developed separately for electric and gas using the control pool customers. For electric, the profiles were developed by summer load shape and climate region.[46] For gas, the profiles were developed exclusively by climate region.
3. Use data from the pre-intervention period to develop a model of energy use. This is modelled as a function of temperature, hour of week, season, occupancy, and indexes of hourly energy use.
4. Apply the model to the pre-intervention period to generate uncertainty statistics. This allows for customers that are not highly predictable to be removed from the analysis to ensure confidence in portfolio-level performance.
5. Apply the model to the post-intervention period to produce a baseline.
6. Estimate savings as the difference between baseline and actual energy use during the period when energy efficiency was in place.

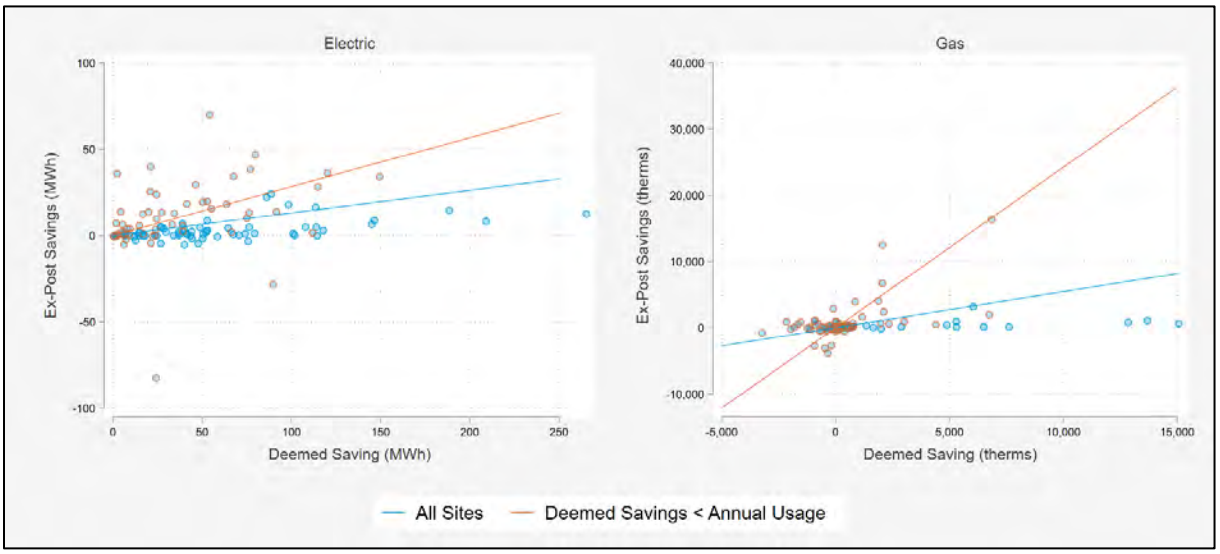
This process is applied to both electric and gas participants. Overall, electric participants generate a realization rate[47] of 13%, and gas participants generate a 55% realization rate. There are 62 electric sites and 20 gas sites that claim more savings than they use in a year. While most of these sites still generate observable savings, the portfolio-level realization rate may be artificially low due to discrepancy in either the claimed savings or the mapped meters. Figure 1.12.3.1 shows how these realization rates change if the analysis is limited to sites where the annual usage is greater than deemed savings. After applying this filter, the realization rates for electric and gas savings are 28% and 242%, respectively.[48]

[46] Inland, coastal, north central, and south central.

[47] Realization rate is the ratio of measured savings to claimed (or deemed) savings.

[48] These realization rates correspond to 56 electric and 83 gas sites.

ESA Figure 1.12.3.1 – Realization Rate Comparison[49]



Results and Recommendations

Table 1.12.3.2 details the savings for the sites that pass the uncertainty screen, which removes customers with a coefficient of the variation of the root mean square error (CVRMSE)[50] of greater than one during the year prior to efficiency installation. Overall, electric and gas savings are estimated to be 11% and 8% of annual energy consumption, respectively. These saving figures correspond to 118 electric and 103 gas sites (Table 1.12.3.2). As described above, the electric and gas realizations are 13% and 55%, respectively.

NMEC methods are a powerful tool, but it is important to understand the applications where they work well and the applications where they do not. Recommendations from this study include:

1. Map meters associated with the EE measures during installation, and monitor data generated from these meters during post-installation.
2. Use out-of-sample (OOS)[51] metrics to evaluate performance.
3. Include a control group to control for exogenous effects.
4. Screen all sites for:
    a) Appropriate meter mapping.
    b) Signal-to-noise ratios[52] (ideally between 10% and 100%).
    c) OOS accuracy.
    d) Non-routine events.[53]
5. Gas AMI data may not have adequate granularity for site-level NMEC methods.

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[49] Ex-post-savings are negative for sites that used more energy in the post-installation period, compared to the baseline (predicted) period.

[50] In this application, CVRMSE refers to the uncertainty measured in the out-of-sample period.

[51] Out-of-sample is defined as the period that begins two years before project installation and ends one year before project installation.

[52] Signal-to-noise is the ratio of deemed savings to pre-installation annual energy use.

[53] Non-routine events in building energy use are those that are not attributable to changes in the independent variables used in the baseline model, or to the efficiency measures that were installed.

ESA Table 1.12.3.2 Overall Program Savings[54]										
Install Month	Electric Savings (MWh)					Gas Savings (Therms)				
	Site Count	Deemed	Ex-Post	CVRMSE	% Savings	Site Count	Deemed	Ex-Post	CVRMSE	% Savings
Jan	13	596	86	0.34	16.1%	10	6,304	1,493	0.33	3.5%
Feb	11	953	71	0.35	17.9%	6	-326	2,185	0.18	5.3%
Mar	7	411	46	0.66	16.5%	6	12,040	1,205	0.30	3.3%
Apr	5	312	38	0.17	5.9%	6	8,555	1,470	0.24	2.2%
May	12	666	-8	3.29	-4.8%	12	14,330	3,131	0.43	3.0%
Jun	15	748	254	0.23	12.6%	11	7,787	1,831	0.30	1.2%
Jul	31	1,229	55	0.35	4.2%	31	17,566	26,494	0.39	19.4%
Aug	12	563	87	0.22	8.9%	10	30,466	13,690	0.46	21.6%
Sep	12	326	131	0.22	14.8%	11	10,868	7,241	0.33	7.0%
TOTAL	**118**	**5,805**	**760**	**0.43**	**11%**	**103**	**107,590**	**58,741**	**0.36**	**8%**

[54] Program savings were calculated for Jan-Sep 2021, as no property was treated during Oct-Dec 2021.

2. California Alternate Rates for Energy (CARE) Program Executive Summary

2022 California Alternate Rates for Energy (CARE) Program | Summary of Results and Program Highlights

In 2022, PG&E estimated that 1,401,702 customers were eligible for the CARE discount. By the end of 2022, PG&E had enrolled 1,469,724, or 105% of the total eligible population within its service territory into the CARE program, including 223,206 new enrollments. 2022's enrollment represents an overall net decrease of 81,269 CARE customers from 2021's enrollment of 1,550,993. Participating households in 2022 received average monthly bill discounts of approximately $52 for electric and $14 for gas.

More than $12.7 billion in cumulative subsidies have been provided to PG&E's CARE customers since the inception of the CARE program through year end 2022. CARE Program Summary Table 2 provides a summary of PY 2022 program expenditures and activities.

CARE Summary Table 2 2022 CARE Program Summary			
2022	**Authorized Budget**	**Actual**	**%**
Administrative Expenses	$13,760,000	$11,096,396	81%
Subsidies and Benefits	$687,689,000	$985,381,958	143%
Total Program Costs and Discounts	**$701,449,000**	**$996,478,354**	**142%**
2022 CARE New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc.**	**Self-Certified as Categorically Eligible**	**Self-Certified as Income Eligible**
By Method	13,061	92,791	117,354
2022 CARE Enrollment	**Estimated Eligible Participants**	**Participants**	**Enrollment Rate**
Total Enrolled	1,401,702	1,469,724	105%

PG&E's primary activities in 2022 for CARE centered around improvement of program processes for PEV and recertification, and continuing efforts to enroll hard-to-reach customers. While the program is overenrolled overall, pockets of the service territory continue to have ZIP Codes with relatively low enrollment. PG&E's strategy for enrolling hard-to-reach customers included marketing in DACs and rural areas, and launching a new CBO ME&O pilot.

The CARE program's noteworthy marketing, outreach, and administrative initiatives and achievements in 2022 included:

- Establishing a CBO ME&O pilot in response to input from its CBO advisory group and other stakeholders that CBOs may be most effective in assisting IOUs with customer engagement when they are offered longer-term, paid contracts.
- Coordinating with the DAC-SASH program administrator, GRID Alternatives, to create a new process for auto-enrolling DAC-SASH referrals directly into CARE or FERA, as well as launching a successful co-marketing effort between PG&E and DAC-SASH.
- Introducing texting as a new method to contact customers with reminders and communications related to recertification.

CARE Program Activities Supporting Environmental and Social Justice (ESJ)

Similar to the discussion in the ESA program's 2022 Summary of Results and Program Highlights, PG&E considers the needs of ESJ communities and has prioritized their inclusion in the CARE (and FERA) programs to the extent possible, thereby advancing and supporting the intent of the Commission's ESJ Action Plan.[55] In 2022, some of the key ways that PG&E's CARE (and FERA) programs incorporated and advanced the goals of the ESJ Action Plan included:

- Significant, proactive CBO funding to support CBOs conducting ME&O activities for CARE and FERA.
- Coordination and cross-referrals with DAC-SASH, LIHEAP, etc. to streamline customer experience including information such as for Lifeline on CARE/FERA program materials and CBO outreach.
- Targeting DACs, rural communities and other hard-to-reach customers in ME&O plans.
- Conducting outreach initiatives in multiple languages.

Procedural Background

The CARE program provides a monthly bill discount of 20% or more on energy bills for qualifying residential single-family households, tenants of sub-metered residential facilities, nonprofit group living facilities, food banks, agricultural employee housing facilities and migrant farm worker housing centers throughout PG&E's service area.

D.21-06-015 authorized PG&E's CARE administrative and subsidy budgets for PYs 2021-2026, and sets a CARE enrollment goal of at least 93% in PG&E's service territory for these program years.[56]

2.1. Participant Information

2.1.1. Provide the total number of residential CARE customers, including sub-metered tenants, by month, by energy source, for the reporting period and explain any variances of 5% or more in the number of participants.

The total number of residential CARE customers, including sub-metered tenants, is included in Appendix A of this report: CARE Table 8 – CARE Participants as of Month-End. During the 2022 PY, no monthly variances of 5% or more occurred.

[55] CPUC Environmental and Social Justice Action Plan (February 21, 2019) Retrievable at https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M263/K673/263673090.PDF; 2.0 version released March 2022. Retrievable at 465846599.pdf (ca.gov).

[56] D. 21-06-015, Attachment 1, Tables 1 and 2.

CARE Table 2.1.1 Residential CARE Program[a]						
Electric Customers by Month				**Gas Customers by Month**		
PY 2022	**CARE Customers**	**Percentage Change**		**PY 2022**	**CARE Customers**	**Percentage Change**
January	1,332,160	n/a		January	1,150,714	n/a
February	1,324,709	-1%		February	1,143,853	-1%
March	1,308,269	-1%		March	1,127,028	-1%
April	1,303,779	0%		April	1,121,686	0%
May	1,281,260	-2%		May	1,101,575	-2%
June	1,277,372	0%		June	1,097,634	0%
July	1,262,175	-1%		July	1,083,061	-1%
August	1,269,905	1%		August	1,086,137	0%
September	1,284,767	1%		September	1,101,043	1%
October	1,282,790	0%		October	1,099,722	0%
November	1,287,511	0%		November	1,105,076	0%
December	1,279,560	-1%		December	1,095,168	-1%
[a] Due to the timing of collection of CARE enrollment data, numbers throughout this report may vary slightly based on reporting timeframe for each monthly report throughout the year.						

2.1.2. Describe the methodology, sources of data, and key computations used to estimate the utility's CARE enrollment rates by energy source.

PG&E used the joint utility methodology adopted in D.01-03-028 for developing monthly enrollment estimates by energy source in 2022.[57] This methodology entails annual estimation of eligibility for CARE, ESA, FERA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

Sources for the 2022 eligibility estimates included the January 2022 Health and Human Services (HHS) Federal Poverty Guidelines (FPG)[58] ("bundling" one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327), current year small area vendor marginal distributions on household characteristics, Census 2020 Summary File 3 (SF3) data, Census American Community Survey (ACS) 2017-2021 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources.

The method takes into consideration ACS microdata relationships between guideline status (above/below 200% FPG), tenure, and fuel payment relationships. These cross classifications are fitted to small area (block group) marginals to produce payer type specific distributions, which can be aggregated to various other geographical levels.

Estimates from the block group level are aggregated to county/utility and whole utility level, among other aggregations. Annually, PG&E applies county/utility level eligibility

[57] Athens Research performs the analysis using the joint utility methodology to provide the estimates for the California IOUs.

[58] Federal Register/Vol. 87, No. 14/January 21, 2022/Notices; pps.3315-3316.

fractions to a new set of “technical eligibility counts” (for CARE, these are metered and sub-metered occupied housing units) to obtain an estimate of income/demographic eligibility in household count form.

PG&E counts the number of households (by small area, by county, and overall) that are enrolled in CARE. The CARE household total, including individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility.

2.1.2.1. Describe how the estimates of current demographic CARE-eligibility rates, by energy source for the pre-June 1st periods, were derived.

The joint utility methodology, as described in Section 2.1.2 of this report, was used throughout 2022.

2.1.2.2. Describe how the estimates of current CARE-eligible meters were derived. Explain how total residential meters were adjusted to reflect CARE-eligible meters (i.e., master meters that are not sub-metered or other residential meter configurations that do not provide residential service.).

CARE eligibility rates by small and large areas are developed so that they apply to individual residential meters and sub-metered dwelling units only. PG&E reviews the base rate plan associated with the meter to confirm the premise is residential. Non sub-metered master meters and other meters that do not provide residential service are not included in the “technical eligibility” meter counts.

2.1.2.3. Discuss how the estimates of current CARE-eligible households were developed.

See PG&E’s response to Section 2.1.2.2 of this report. The methodology is based on estimating small area (block group) level household size by income and householder age tabulations for the current year and connecting these estimates with small area counts of households that are individually metered or sub-metered. Block group/utility-specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area: ZIP+2, ZIP, tract, county, territory, etc. Statewide estimates, regardless of utility boundaries, are also provided at small and large area levels.

2.1.2.4. Describe how current CARE customers were counted.

PG&E compiles a monthly report from the billing system with all accounts flagged as currently enrolled in CARE. This monthly report incorporates all CARE customer information necessary for reporting, including energy source information (electric, gas, or both) and CARE enrollment and recertification dates.

In the case of sub-metered tenants receiving CARE discounts from their master-metered facilities, PG&E runs a separate monthly report to count the number of sub-metered dwelling units that are flagged as being enrolled in CARE.

2.1.2.5. Discuss how the elements above were used to derive the utility's CARE participation rates by energy source.

The participation rate by energy source is the total number of participating CARE customer households by energy source divided by the estimated eligible CARE population by energy source.

2.1.3. Provide the estimates of current demographic CARE-eligibility rates by energy source at year-end.

PG&E's estimates of current demographic CARE eligibility rates by energy source at year-end are:

Electric and Gas:	23.3%
Electric-only:	27.1%
Gas-only:	27.1%

2.1.4. Provide the estimates of current CARE-eligible sub-metered tenants of master-meter customers by energy source at year-end.

PG&E's estimates of current CARE-eligible sub-metered tenants of master-meter customers by energy source at year-end are:

Electric-only:	42,539
Gas-only:	28,545

2.1.5. Provide the current CARE sub-metered tenant counts by energy source at year-end.

PG&E's current CARE sub-metered tenants counts by energy source at year-end are:

Electric-only:	22,116
Gas-only:	16,501

2.1.6. Provide the current CARE sub-metered enrollment rates by energy source at year-end.

PG&E's current CARE sub-metered enrollment rates by energy source at year-end are:

Electric-only:	52%
Gas-only:	58%

2.1.7. Discuss any problems encountered during the reporting period administering the CARE program for sub-metered tenants and/or master-meter customers.

Challenges encountered in 2022 for sub-metered tenants and/or master-meter customers are described below, along with mitigation and improvement efforts to help address issues.

Mobile Home Park (MHP) Property Manager Communication

To advertise the CARE program for eligible tenants of sub-metered residential facilities, information packets containing program applications are mailed to Mobile Home Park (MHP) landlords/property managers annually. However, PG&E consistently receives returned and undelivered envelopes due to the high turnover of landlords/property managers. In situations where PG&E did receive notice of new landlords or property

managers, PG&E worked with them to transfer existing CARE certified tenant data to new accounts and onboard them with CARE program information.

PG&E provides a monthly CARE certification report to landlords/property managers and requests landlords/property managers to contact PG&E with updated information. Despite this outreach, some landlords/property managers failed to notify PG&E when a CARE-certified tenant moved out of the facility. To reduce this problem, PG&E increased its outreach, and provided detailed instructions on the certification report cover letter that requested that the landlords/property managers notify PG&E in writing, via email or fax, if certified tenants moved out. Likely due in part to this increased outreach PG&E observed a 50% improvement in notifications received from landlords/property managers in 2022, as compared to 2021's results.

Tenant Billing

Some new MHP owners or property managers did not know how to calculate electricity and gas discounts for their tenants. PG&E's CARE staff provided high-level information regarding the tiered rate structure to assist in tenant billing.

2.1.8. Discuss the steps taken towards Marketing CARE to Mobile Home customers and converting Mobile Home Sub-metering to direct utility served customers.

Some of the billing challenges described in Section 2.1.7, are ongoing due to the nature of the billing for this type of metering. MHP metering conversions to single individual metering for tenants can help address these issues, as each tenant would then be the customer of record for their account and would be responsible for reviewing and paying their bill. PG&E has undertaken converting mobile home sub-metering to direct utility served customers in recent years by increasing outreach to landlords/property managers and improving customer support. For example, in September 2022, PG&E's Operations team began implementing a daily review of sub-meter to residential meters to further support tenants maintaining their CARE status as they transitioned. In sum, 171 MHPs have transitioned from sub-metered to direct metering, of which 115 have been fully converted, and 56 have been partially converted. However, there are challenges and barriers to expanding MHP conversion from sub-metering to direct metering for the 1,040 MHPs that remain master-metered, primarily because PG&E is not authorized to mandate these conversions.

2.2. CARE Budget Summary

2.2.1. Please provide CARE program summary costs.

CARE Table 2.2.1
CARE Program Summary Costs

CARE Budget Categories	Authorized Budget [a]	Actual Expenses [b]	% of Budget Spent
Outreach	$6,313,326	$4,503,161	71%
Processing, Certification, Recertification	$844,100	$687,125	81%
Post Enrollment Verification	$1,475,900	$1,382,780	94%
IT Technology/Programming [c]	$2,144,038	$2,144,038	100%

CARE Table 2.2.1 CARE Program Summary Costs (continued)			
CARE Budget Categories	**Authorized Budget [a]**	**Actual Expenses [b]**	**% of Budget Spent**
Community Help and Awareness of Natural Gas and Electric Services Program (CHANGES) Program [d]	$892,854	$892,854	100%
Studies and Pilots [e]	$45,682	$45,682	100%
Measurement and Evaluation	$200,000	$107,492	54%
Regulatory Compliance	$369,400	$320,022	87%
General Administration	$1,306,800	$894,426	68%
CPUC ED Staff	$167,900	$118,816	71%
Total Expenses	**$13,760,000**	**$11,096,396**	**81%**
Subsidies and Benefits	$687,689,000	$985,381,958	143%
Total Program Costs and Discounts	**$701,449,000**	**$996,478,354**	**142%**

[a] D.21-06-015 approved the CARE program budget for PYs 2021-2026. 2022 authorized budget includes $1,107,039 for Benefit Burdens as approved in D.20-12-005.
[b] Actual expenses include employee benefits costs.
[c] Information Technology (IT) programming budget reflects fund shift $1,053,438 from the Outreach category in according to fund shifting guidelines in D.12-08-044, as updated in D.16-11-022, D.17-12-009 and D.21-06-015.
[d] CHANGES budget reflects fund shift $367,854 from the Outreach category in according to fund shifting guidelines in D.12-08-044, as updated in D.16-11-022, D.17-12-009 and D.21-06-015.
[e] Studies and Pilots budget reflects fund shift $45,682 from the Outreach category in according to fund shifting guidelines in D.12-08-044, as updated in D.16-11-022, D.17-12-009 and D.21-06-015.

2.2.2. Please provide the CARE program enrollment rate to date.

CARE Table 2.2.2 2021 CARE Program Enrollment			
Participants Enrolled	**Eligible Participants**	**Enrollment Rate**	**Target Met? [a]**
1,469,724	1,401,702	105%	Yes

[a] Attachment 1, Table 1 of D.21-06-015 sets a 93% enrollment goal floor for PY 2022 for PG&E.

2.2.3. Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE recertification efforts, and the nature of the complaints.

Over the course of 2022, one complaint was received related to recertification, from a customer who submitted an application but was denied based on being over the income guidelines; this was explained to the customer. PG&E received 11 complaints related to PEV, generally around receipt of income documents, status of the process or questioning program removal. In all cases, customers had either failed to submit documentation or provided incomplete documentation, and PG&E contacted them to support resubmittal where appropriate. Also, four were related to sub-metered tenants who wanted to confirm that they were on the CARE program. Where relevant, customers were advised to provide the documents missing to get back on the CARE program and were issued an adjustment if applicable.

2.3. CARE Program Costs

2.3.1. Discount Cost

2.3.1.1. State the average monthly CARE discount received, in dollars, per CARE customer by energy source.

PG&E's average monthly CARE discount received in 2022, in dollars, per CARE customer are shown here by energy source:

Average Monthly Electric Discount:	$51.86
Average Monthly Gas Discount:	$13.74

2.3.1.2. State the annual subsidy (discount) for all CARE customers by energy source.

PG&E's annual subsidy in 2022 for all CARE customers are shown here by energy source:

Electric Subsidy:	$801,324,709
Gas Subsidy:	$184,057,249
Total:	$985,381,958

2.3.1.3. Provide the Number and Percent of Green Tariff Shared Renewables (GTSR) and Enhanced Community Renewables customer base. Also provide the average total bill discount.

In 2022, the number of CARE customers on Green Tariff Shared Renewables (GTSR) was 675 (0.05% of the CARE population). No CARE customers enrolled in the Enhanced Community Renewable Program. CARE-enrolled GTSR customers received the same bill discount as all CARE customers.

2.3.2. Administrative Cost

2.3.2.1. Show the CARE residential program's administrative cost by category.

PG&E shows the CARE residential program's administrative cost by category in Appendix A of this report: CARE Table 1 – CARE Overall Program Expenses.

2.3.2.2. Explain what is included in each administrative cost category.

Explanations of PG&E's administrative costs by category are as follows:

Outreach

This cost category includes:

- Marketing and Outreach (M&O) campaigns, such as direct mail, email, telemarketing, Automated Voice Response (AVR) systems, digital media and radio.
- Retention outreach.
- Printing of bill inserts, applications, advertising and promotional materials, annual notifications to sub-metered facilities, and other CARE program materials.
- Postage and handling fees.
- Purchase and storage of promotional items, other goods, and supplies.
- CARE toll-free line maintenance and operation, and PEV Outbound Call Pilot.
- Capitation fees to COCs[59] for new CARE enrollments and assistance with the PEV process, community event costs, community outreach activities and partnerships with CBOs.
- Staff labor related to ME&O.
- Other expenses include travel, membership fees, sponsorships, conferences, catering, and other outreach-related costs.

Processing, Certification and Recertification

This cost category encompasses day-to-day administrative tasks associated with processing CARE applications, including:

- Reviewing, sorting, scanning, processing, and data entry of CARE applications.
- Initiating and responding to customers' inquires by mail, email or phone regarding program participation.
- Resolving billing issues related to program enrollment.
- Tracking CARE enrollment and recertification statistics in support of operations and regulatory management.
- Training and other related costs.

Post Enrollment Verification (PEV)

This cost category encompasses day-to-day administrative tasks associated with completing PEV and High Usage (HU) verifications, including the following:

- Reviewing, sorting, scanning, data entry and processing of CARE PEV and HU correspondence.
- Printing and mailing of PEV and HU letters.
- Initiating and responding to customers' inquiries by mail, email or phone regarding the PEV and HU process.
- Resolving billing issues.
- Tracking CARE PEV and HU statistics in support of operations, management and regulatory support.
- Training and other related costs.

[59] D.21-06-015, OP 14, approved the CARE capitation fee increase from $20 to *up to* $30 per enrollment.

IT Programming
This category includes:

- Ongoing software enhancements and licensing for PG&E's current technology supporting CARE program activities.
- Routine and non-routine system maintenance.
- Automated CARE enrollment internal data exchanges among CARE, ESA, REACH and LIHEAP programs.
- External data exchanges with IOUs, municipalities and water utilities.
- Data reporting and analysis.
- CARE system enhancement and maintenance.
- Online applications enhancement and maintenance.
- Website and interactive voice response (IVR) enhancement and maintenance.
- Other IT-related obligations.

Studies and Pilots
This cost category includes any pilot projects for the CHANGES program. For 2022, this included the reimbursement cost for the ongoing CHANGES program, as well as the CHANGES Evaluation and staff labor to support the program.

This cost category includes any pilot projects for the program. For 2022, this included costs for LINA study.

Measurement & Evaluation
This cost category includes all measurement and evaluation related to the CARE program, including contract expenses for the annual study of CARE customer eligibility estimates and other studies where appropriate.

Regulatory Compliance
This category includes costs for staff labor and travel expenses associated with preparing regulatory filings, including:

- Program applications.
- ALs.
- Tariff revisions, comments and reply comments.
- Hearings.
- Preparation of regulatory compliance reports.
- Preparation of data request responses.
- Attendance at working group sessions, public input meetings and public workshops.
- Travel expenses and other related costs.

General Administration
This category includes:

- Program management labor.
- Office supplies and equipment.

- Envelopes and printing of CARE letters.
- Customer research.
- Propensity model costs.
- Other expenses include training, travel, membership fees, sponsorships, conferences, catering and other administrative-related costs.

CPUC ED Staff
This cost category includes reimbursement funding for ED staff.

2.3.3. Provide the year-end December 31 balance for the CARE balancing account.

At year-end 2022, the CARE electric balancing account was under-collected and reflected a year-end debit balance of $191,097,520. The CARE gas balancing account was under-collected and reflected a year-end debit balance of $33,602,659.

2.3.4. Describe which cost categories are recorded to the CARE balancing account and which are included in base rates.

All CARE administrative cost categories as well as the revenue shortfall associated with the CARE discount are included in the CARE balancing account, not in base rates.[60]

2.3.5. Provide a table showing, by customer class, the CARE surcharge paid, the average bill paid, the percentage of CARE surcharge paid relative to the average bill, the total CARE surcharge collected, and the percentage of total CARE revenues paid.

PG&E includes the CARE surcharge and revenue data in Appendix A of this report: CARE Table 10 – CARE Surcharge & Revenue.

2.4. Marketing, Education and Outreach

2.4.1. Discuss utility outreach activities and those undertaken by third parties on the utility's behalf including Lifeline coordination.

CARE program enrollment remained at approximately 105% throughout 2022. PG&E prioritized outreach and marketing to engage vulnerable and hard-to-reach customers. Marketing efforts focused on efficient channels and targeted tactics to enroll and retain customers. The direct marketing communications strategy was updated to deploy email to a targeted audience monthly, along with quarterly campaigns to previously enrolled customers. While the media spend for broad mass-market awareness tactics was reduced, PG&E maintained the ZIP Code targeting strategy for increased media weight in hard-to-reach areas.

In 2022, PG&E leaned heavily on third-party partnerships with CBOs to conduct outreach to hard-to-reach and disadvantaged communities on the availability of various assistance

[60] D.02-09-021.

and bill discount programs. In addition to the long-standing CARE Capitation program, PG&E proactively developed new CBO initiatives and made longer-term investments in CBOs via two pathways: the ME&O Contracts and a FERA Outreach Pilot. These initiatives, offering CBOs an 18- to 24-month contract with robust compensation structures to cover on-the-ground outreach costs, created 14 CBO partnerships in 2022, eight for CARE ME&O and an additional six CBOs for the FERA Outreach Pilot. PG&E created these new initiatives in response to informal feedback received from its advisory groups, the LIOB, and other stakeholders, pointing to CBOs as a trusted community voice to help deliver messages to hard-to-reach households. Combined, these CBOs reported reaching approximately 750,000[61] customers in 2022 with information on CARE, FERA, ESA, AMP, Smart AC, Power Saver Rewards, and other complementary offerings.

PG&E offered support and resources to contracted CBOs with the goal of improving their experience in partnering with PG&E and driving more effective community outreach tactics. This support included campaign guidance to ensure alignment with business priorities, enhanced print and digital resources, increased accessibility to self-serve, and scalable multi-channel marketing tools such as program-specific social media templates. PG&E plans to expand support and resources further in the following year by providing strategic co-branding opportunities and continued campaign prioritization guidance.

Examples of PG&E's CARE marketing materials are shown in Appendix E of this report – CARE Marketing Materials.

Key findings:

- Compared to 2021, the 2022 CARE customer profile shifted to look more like the pre-pandemic profile which skews towards lower-income customers with higher bills.
- FERA direct marketing campaigns drove significant new CARE (rather than FERA) enrollments.
- PG&E's new 'Never Targeted' acquisition campaign generated higher enrollment rates compared to the previous quarterly campaign.
- CARE enrollment exceeds 100% overall; however, a few areas remain within PG&E's service area that have high levels of estimated eligible customers, but low levels of enrollment.
- New channel testing showed promise for increasing the number of customers who successfully complete recertification.
- CBO partners conducting ME&O have reported significantly lower attendance at in-person events after the pandemic compared to pre-pandemic attendance
- Social media continues to be an important outreach tool for CBOs in reaching community members

CARE Customer Profile

Year-over-year comparison of the CARE customer profile shows that 2022 enrollees shifted even further to look more like the pre-pandemic profile. The 2022 CARE enrollees have slightly lower household income than 2021 CARE enrollees and higher bills.

[61] Per survey results submitted by CBOs.

Compared to 2021 CARE enrollees, CARE enrollees in 2022 are more likely to be high electric and/or gas users. 2022 CARE enrollees are also more likely to be gas only customers and have two adults in the household.

CARE Direct Marketing

In 2022, the CARE direct marketing campaign used the email channel exclusively. PG&E deployed CARE email messages to over 245,000 unique customers, using the CARE Acquisition Propensity Model to select campaign audiences.[62]

In June 2022, PG&E launched a new, monthly direct marketing campaign to "Never Targeted" customers. The Never Targeted audience consisted of customers who had never received a CARE/FERA direct marketing campaign. The objective was to maintain the new enrollment pipeline, initiating multi-touch program promotions as soon as a potentially eligible customer was identified by the CARE Acquisition Propensity Model.

Each month, the campaign selected Never Targeted customers from model deciles 1-3, and up to three communications were sent over a period of about seven months. If the customer did not enroll after three communications, they were moved into the "Non-Responder" segment.

The Never Targeted campaign generated a much higher enrollment rate for both CARE and FERA compared to the quarterly campaign deployed in Q1 2022 (CARE: 3.48% vs. 1.02%, FERA: 0.27% vs. 0.13%).

PG&E also continued to send quarterly email campaigns targeted to CARE customers who Failed-to-Recertify (FTR) in the prior quarter. The FTR campaigns continued to have the highest enrollment rates (9.0% CARE enrollment rate for Q1-Q3 campaigns).

In addition to the CARE emails, targeted campaigns promoting FERA drove a significant number of CARE enrollments. FERA message campaigns continue to drive CARE enrollments at a ratio of approximately eight CARE enrollments for every one FERA enrollment. In total, CARE and FERA direct marketing campaigns targeted over 1.5M customers and generated over 34,000 enrollments for CARE.

Paid Media Summary

PG&E continued with an integrated "Always-On" digital media strategy to drive awareness and online applications. The campaign used paid Google search, Google Discover (Gmail) ads, display and native[63] (contextual) advertising. The campaign included both English and Spanish placement and creative, with a 70% English / 30% Spanish budget allocation.

The CARE digital campaign saw continued incremental gains in key performance metrics. The campaign generated almost 75M impressions and over 900,000 clicks, resulting in more than 500,000 landing page visits. The CTR of 1.21% exceeded the historical 0.25% CTR, improving campaign efficiency.

Although the digital campaign buy was territory-wide, PG&E continued increased spending in select ZIP Codes as part of the ongoing strategy to increase awareness with Hard-to-Reach customers. ZIP Codes were identified as Hard-to-Reach based on lower

[62] The CARE Acquisition Propensity Model scores every residential PG&E customer and assigns them to a decile (1-10), with a decile 1 being most likely to enroll and 10 being least likely.

[63] Native ads appear as sponsored advertising on a site or page with similar/relevant content.

CARE enrollment rates vs. estimated eligible population, and those that were in designated rural and/or high-poverty areas.[64] Based on the ongoing strong CARE enrollment, the display and native buys were reduced mid-year from territory-wide to just the ZIP Code targeted coverage. PG&E plans to review the ZIP Code targeting strategy and results in 2023 to identify opportunities to adjust the media plan approach based on lessons learned.

Bill Inserts

The annual CARE/FERA bilingual bill insert took place in June 2022 and included the updated income guidelines. All customers receiving paper bills received the bilingual application in their PG&E bill, while paperless bill customers were provided a link to view monthly bill inserts.

Retention Campaigns

PG&E continued testing additional communication channels as part of the Recertification Reminder campaign, including SMS/text message and outbound automated calls. As part of the ongoing test, some customers due to recertify received a call or a text message at 120- and 30-days prior to the program end date.

Results for customers who received an automated call demonstrate a higher recertification rate than the control cells (customers who do not receive the additional call reminders), indicating that the addition of the call has a positive impact on retention.

In Q3 2022, the audience for the text testing was expanded to ensure as many customers as possible were receiving text reminders and to allow data levels to achieve statistical significance (i.e., testing a higher volume of customers to analyze results). Analysis will occur in 2023 to evaluate the impact of the addition of a text reminder on recertification rate once enough customers have completed the full recertification communication journey. The lessons learned from testing will inform recommendations for ongoing campaign optimization.

To further support CARE program retention and improve the customer experience, PG&E began development of an enhanced CARE Welcome campaign. The campaign will deploy to newly enrolled and re-enrolling customers, providing timely communication of the program savings benefit, program guidelines and how to monitor savings each month to demonstrate the value of being enrolled. The communications will be personalized with dynamic content including information other relevant cost and energy saving programs based on customer data attributes and eligibility. The new version of the CARE Welcome campaign is planned for launch in Q1 2023.

Earned Media and Local Outreach

Throughout 2022, PG&E's income-qualified programs garnered several earned media stories, across general market and multicultural media outlets. Coverage included live and pre-recorded radio interviews and programming for stations such as:

[64] A High Poverty household has income at or below 100 percent of the Federal Poverty Level Guidelines. Rural areas are defined as those isolated from larger metropolitan areas, by distance or other physical features. PG&E has identified specific ZIP Codes and counties within PG&E's territory that fall within these definitions for targeting purposes. The 2020 Hard-to-Reach ZIP Code targeting list included 367 (out of 1,001) prioritized ZIP Codes which capture most of the CARE eligible, non-enrolled, FERA eligible, non-enrolled, Rural and High Poverty customers.

- **Cuerpo Corazon Comunidad Radio:** program focused on safety and health resources for Spanish-speaking communities in and around Marin County.
- **KZSF Radio:** covering Santa Clara, San Mateo, Alameda and Contra Costa counties.
- **KIQI Radio:** serving Central and Northern California's Latino community.

PG&E also participated in local outreach opportunities to promote CARE, FERA and other assistance programs, including LIHEAP, AMP, and Lifeline. PG&E hosted several webinars and in-person workshops in partnership with local organizations such as the Mexican Consulate in Fresno and the Community Youth Center (CYC) in San Francisco.

Outbound Financial Assistance

In 2022, PG&E continued outbound case management calls to reach customers with past due amounts. The case management calls provided customers with flexible pay payment plans as well as information about CARE, FERA, MBL and other partner agency assistance programs such as LIHEAP. Customers who were deemed to be eligible for a specific program were enrolled.

In 2022, the campaign targeted 174,651 customers. PG&E Customer Service Representatives (CSRs) were able to make contact with contact 167,514 customers directly. The customers who could not be reached received a voicemail with information regarding financial assistance programs.

PG&E also successfully identified $512M in potential savings for customers. Before calling customers, CSRs ran a rate analysis for each customer and provided advice if those customers had the potential to save money on their bills by switching their rate plan or adding a program such as SmartRate. Customers with a past due balance were directed to LIHEAP where they received pledges totaling $705,175.

CARE Table 2.4.1
Outbound Case Management Calls to Customers with Past Due Amounts

2022	Totals
Number of Customers Reviewed	174,651
Customers Called	167,514
Enrolled in CARE/FERA	618
LIHEAP Pledge Amounts	$705,175
Total Rate Savings Identified	**$5,501,654**

Community Based Organization (CBO) Outreach

As described earlier in this Section, PG&E contracted with 14 CBOs to conduct marketing, education and outreach in 2022 via two new initiatives: eight CBOs were identified for the ME&O Pilot and six CBOs were identified for the FERA Pilot. In order to help determine the success of the two outreach pilots, PG&E tracks the number of applications submitted by CBOs using a unique four-digit code. Through PG&E's internal tracking, 901 CARE applications were received from the CBOs participating in the ME&O and FERA outreach Pilots. Of the 901 CARE applications submitted by the CBOs, 408 were new CARE enrollments. The remaining applicants were already enrolled.

Four FERA applications were received, and three new customers were enrolled in FERA as a result of the two outreach pilots. The results show that CBOs are reaching more customers who are already enrolled in CARE with a lower enrollment outcome and not reaching the FERA eligible population.

As required, CBOs submit surveys reporting on outreach efforts including the number of customers reached, outreach methods, marketing materials utilized, languages used, and other information. CBOs reported that outreach involved in-person/door-to-door outreach, webinars, social media, newsletters, direct mail, and CARE/FERA application intake assistance. Some CBOs also utilized partnerships with other organizations to help reach more customers. CBOs utilized PG&E marketing materials in multiple languages, including Spanish, Chinese, Vietnamese, Hmong, and Tagalog to conduct the outreach.

CARE Community Outreach Contractors (COCs)

The CARE program partners with various COCs. These agencies help enroll customers into the CARE or FERA program. In 2022, PG&E had partnerships with 26 CARE COCs. Through the COC program, PG&E has received a total of 1,324 applications for the CARE program, resulting in 958 new enrollments.

Lifeline Program Integration

Both PG&E and its CBO network have integrated Lifeline messaging into CARE outreach in the following ways:

- PG&E includes Lifeline on its www.pge.com/billhelp webpage, which provides information on a variety of customer support programs.
    - PG&E's marketing includes references to this page periodically from newsletters, news releases, and other integrated messaging of customer assistance programs.
- The Cal Lifeline and Internet for All programs (now ACP) are both included on print and digital resources that are utilized by CBO's in outreach.
    - For example, PG&E developed a new webpage for community organizations and advocates in 2022 that includes Lifeline.[65]

2.4.1.1. Discuss outreach to CARE customers for the Home Energy Report (HER), including percentage participation.

HERs explain energy usage, allow customers to compare their energy use to similar homes in their area, and provide customized tips and ideas to help customers maximize their energy savings. In 2022, approximately 2.96M customers participated in HERs with approximately 1.05M customers flagged as income-qualified. Of those customers, approximately 816,000 were enrolled in CARE representing 81% of the income-qualified customers who received a HER and accounts for 56% of all customers enrolled in CARE as of December 2022. PG&E continues to promote CARE and FERA via marketing modules included in the HERs to customers flagged as income-qualified and unenrolled.

2.4.2. Discuss the most effective outreach method, including a discussion of how success is measured.

As outlined in Section 2.4.1, PG&E leverages a multi-channel marketing strategy, using a mix of channels and tactics such as direct mail, email, digital advertising, the bill package and others that work together to drive awareness, engagement, and enrollment. The multi-channel approach provides the most effective method of outreach because it

[65] https://www.pge.com/en_US/residential/save-energy-money/help-paying-your-bill/community-partnership/community-organizations-and-advocates.page

increases customers' potential to see the messages in many places; have messages reinforced through repetition; and create a sense of urgency to encourage customers to act. Each tactic is measured based on specific Key Performance Indicators (KPIs) including cost-per measures (e.g., cost per visit, cost per click, cost per piece, etc.), click-through and view rates, and enrollment rates depending on the data available for the specific tactic and response channel. Due to online tracking limitations and a single shared application for CARE and FERA, digital media enrollments driven by marketing outreach are not directly attributable at the tactic level. Overall effectiveness is evaluated based on how the tactics work together to deliver to engagement and enrollment targets, and to make decisions to improve or optimize campaigns.

2.4.3. Discuss barriers to participation encountered during the reporting period and steps taken to mitigate them.

Despite high overall CARE enrollment, there remain areas scattered within PG&E's territory with high levels of eligibility (estimated eligible population), but low levels of CARE enrollment. PG&E uses a ZIP Code targeted media strategy attempting to reach these Hard-to-Reach populations. Additionally, PG&E plans to conduct additional analysis to generate actionable insights to help adapt marketing strategies and channel mix to drive increased program participation in these under-developed areas (see discussion in 2.4.8).

PG&E's outreach efforts employ strategies that place continued focus on barriers identified through historical research including:

- A multi-channel, multi-touch outreach approach to drive awareness and engagement.
- Simplified messaging that outlines eligibility requirements, emphasizes the ease of application, and provides multiple ways to apply.
- An empathetic and friendly tone to marketing and communications.
- Bilingual English/Spanish marketing campaigns.
- CARE applications, brochures and support in multiple languages.

Through monthly surveys and regular check-ins with our CBO partners who participate in the outreach efforts described above, the most common challenges identified include difficulty building trust with community members and customers due to an increase in scams that target vulnerable populations. The number of scams on social media and door to door outreach has significantly increased in recent years, making it more difficult for legitimate organizations to build trust with community members. In 2023, PG&E plans to further expand CBO support by providing strategic co-branding opportunities and resources to help CBOs build customer trust.

CBOs confirmed that COVID-19 had a negative impact on in-person events, interactions, and outreach. Despite restrictions being lifted in 2022, CBO partners have documented that there is significantly lower attendance at in-person events, making this type of outreach less effective than in prior years.

2.4.4. Discuss how CARE customer data and other relevant program information is shared by the utility with other utilities sharing its service territory.

A portion of PG&E's service area is shared with other CPUC regulated energy and water utilities. In 2022, PG&E had data sharing agreements with SoCalGas, SCE, Sacramento

Municipal Utility District, California American Water, California Water Service, Del Oro Water Company, Golden State Water, Great Oaks Water, and San Jose Water. PG&E shares customer data with these utilities quarterly via an automated, secure file transfer process that extracts lists of enrolled CARE customers identified in the shared service areas.

2.4.5. Discuss how CARE customer data and other relevant program information is shared within the utility, for example, between its ESA program and other appropriate low income programs.

A database of CARE customer contact information is uploaded for weekly distribution to PG&E's ESA program implementers for use in their outreach. Since the ESA income guidelines are higher than those for CARE, PG&E automatically enrolls customers in CARE who have participated in the ESA program.

Since the CARE discount is noted in the customer information system, PG&E CSRs can see the CARE status of any customer calling PG&E's contact centers for assistance. This provides important information for CSRs to use when discussing other benefits and services that may be of assistance to income-qualified customers.

Each CARE application provides a brief description of other financial assistance programs available in PG&E's service territory as well as contact numbers.

PG&E's CARE program integrated with other PG&E assistance programs to generate enrollments. CARE applications are on display and available to visitors at Cooling Centers. PG&E provides the CHANGES program contractors with training and collateral to help Limited English Proficient (LEP) customers enroll in CARE and other assistance programs. PG&E also runs monthly reports of customers receiving bill payments received through CSD's LIHEAP and PG&E's REACH programs and automatically enrolls eligible customers in CARE.

These combined efforts resulted in 7,766 new enrollments in 2022.

2.4.6. Describe the efforts taken to reach and coordinate the CARE program with other related low-income programs to reach eligible customers.

Throughout 2022, PG&E targeted existing CARE customers for outreach related to the ESA program. Because existing CARE customers were likely to qualify for the ESA program based on their income level, this was a way to ensure that the customer qualified via income guidelines. Other filters were then applied to determine those customers who had the highest likelihood of being eligible for the ESA program.

As stated in Section 2.4.5 of this report, PG&E automatically enrolls customers who receive LIHEAP and REACH assistance in the CARE program. Furthermore, for the CARE automated phone calls, PG&E integrates information about the FERA and ESA programs. Additionally, Section 2.4.1 of this report details efforts to cross-promote Internet Services for All, a discounted broadband service, with CARE and other relevant offerings.

PG&E provides bi-annual trainings to CBOs on income-qualified programs in a holistic approach to simplify the customer journey. In 2022, PG&E trained CBOs on CARE/FERA, ESA, Solar Choice, rate options including TOU, MBL, AMP, community pilots for DR, Green Saver program, energy management tools, Community Wildfire

Safety program, and provided info on other assistance programs such as LIHEAP and REACH. In addition to the bi-annual CBO trainings, PG&E launched a focused training series in 2022, designed to provide CBOs with in-depth program knowledge and more opportunities for question and dialogue with subject matter experts at PG&E and other CBO representatives.

Additionally, PG&E continues to coordinate CARE with other income-qualified outreach efforts to help streamline customer enrollment across multiple programs. For example, in July 2022, PG&E and GRID Alternatives (GRID), the program administrator for the DAC-SASH program finalized a new process that allows for GRID's referrals to PG&E to be directly enrolled into either CARE or FERA. GRID has verified the actual household income of the customers through their DAC-SASH application process, allowing PG&E to determine if they are CARE or FERA eligible and directly enroll them. In PY 2022, 374 CARE and 84 FERA direct enrollments resulted from this GRID and PG&E coordination initiative.

2.4.6.1. Track Costs of AB 793 related Energy Management Technologies program (identify all of the programs or initiatives that will be able to benefit from the availability of the end-use and electric usage profiles, and to coordinate with the relevant proceedings so that the relevant costs can be considered in those proceedings' cost-effectiveness decision making).

Please refer to Section 1.2.5 of this report.

2.4.7. Describe the process for cross-referral of low income customers between the utility and the California Department of Community Services and Development (CSD). Describe how the utility's CARE customer discount information is provided to CSD for inclusion in its federal funds leveraging application. (Note: These agreements are limited to sharing 1-800 phone numbers with customers and providing CARE benefit information for the federal fiscal year, October 1 of the current year through September 30 of the subsequent year. There are no tracking mechanisms in place to determine how many customers contact the other programs or actually become enrolled in other program(s) as a result of these agreements.)

PG&E provides quarterly and other reports to CSD on various programs such as LIHEAP. To facilitate secure sharing of customer information with CSD, PG&E uses a secured file transfer site to share any sensitive or personal customer information between PG&E and CSD. This secure file transfer system ensures that customer information is protected when sharing or receiving data. PG&E is currently leveraging this process to share data regarding LIHEAP eligible customers with past due balances so that local agencies can conduct their own outreach efforts.

PG&E has provided assistance by leveraging federal funding through CSD's LIHEAP on an annual basis since 1989. The primary information provided to CSD is a monthly breakdown of the total number of participants (residential and sub-metered tenant counts) along with the total dollar amount of discount provided to that portion of the population during that period.

2.4.8. Discuss any recommendations to improve cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties under contract to the utility to improve outreach and enrollment services to non-participating households in the prior year. Provide cost-effectiveness assessments, if available.

In 2022, PG&E focused on continuous improvement opportunities in outreach, including the following:

- Implemented new, monthly acquisition campaign targeted to Never Targeted customers (described in Section 2.4.1). The new CARE/FERA Never Targeted campaign reduced the cost per enrollment from $21.60 to $11.70 in comparison to the previous quarterly campaign (total CARE and FERA enrollments).
- Enhanced communication to customers selected for PEV with additional text reminders to reduce non-response rate.
- Expanded text reminders within the Recertification Reminder channel testing campaign
- Tested a new “Explainer” native ad unit in the FreshEBT app

2.4.9. Low CARE Enrollment Zip Codes. Discuss the strategies that were effective in targeting and enrolling these hard to reach households. Include the IOU’s successes, short-comings, and corrective plans in ME&O strategies to enroll customers in zip codes that fall into these categories.

PG&E continued a strategy of targeting heavier media spend in ZIP Codes with low CARE enrollment rates, and ZIP Codes in Rural and High Poverty areas. Direct marketing campaigns show increased enrollment rates in the targeted ZIP Codes, indicating the positive impact of this strategy.

Evaluating the low enrollment CARE categories from the ZIP Code lists in the CARE monthly report Tables 8 and 8A, CARE has been largely successful at enrolling customers throughout the territory. However, the reports indicate that small pockets of potentially eligible customers remain unenrolled.

To address these findings and focus on the areas of high unenrollment, PG&E has developed the following corrective plan:

- In 2023, PG&E’s data analyst consultant will conduct a deep dive on the Hard-to-Reach customers to search for actionable insights.
- Using a proprietary platform[66] that includes over 7,000 data attributes for over 250M U.S. consumers, the analysis will identify ZIP Codes where CARE and FERA eligibility rates are above average and enrollment levels are either Saturated (index>120) or Under-Developed (index<80).

[66] Analysis will be performed via Omni, Omnicom’s proprietary platform for integrated, data-driven marketing insights, planning and activation. Omnicom is an American global media, marketing and corporate communications holding company.

- Further segmentation will look at characteristics of customers in these areas to identify underlying hard-to-reach segments of opportunity.
- PG&E plans to leverage these insights to inform and adapt marketing strategies and channel mix to drive increased program participation in these under-developed areas.
- Additionally, PG&E plans to expand the number of partnerships with CBOs who can prioritize outreach to customers who have been Hard-to-Reach.

2.5. Processing CARE Applications

2.5.1. Describe the utility's process for recertifying sub-metered tenants of master-meter customers.

PG&E's process for recertifying sub-metered tenants of master-meter customers consisted of mailing the recertification package to sub-metered tenants 90 days prior to their CARE expiration date. A reminder letter was also mailed 30 days prior to the CARE expiration date, and tenants were removed from the CARE rate if they did not respond by the due date.

2.5.2. Describe any contracts the utility has with third parties to conduct certification, recertification and/or verification on the utility's behalf. Describe how these third-party efforts compare to the utility's efforts in comparable customer segments, such as hard-to-reach or under-served. Include comparisons of effectiveness and cost-effectiveness of comparable customer segments, if available.

PG&E did not have any contracts with third parties to conduct certification, recertification, and/or verification on PG&E's behalf in 2022.

2.6. Program Management

2.6.1. Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

Issues affecting program management primarily were related to emergency consumer protections put in place in 2022 due to impacts from disasters including wildfires and earthquakes, as detailed in Table 2.6.1. PG&E addressed these issues by pausing PEV for both standard and HU PEV requests, in the affected areas[67], and based on ZIP Code.[68]

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[67] CPUC Resolution M-4833 directed IOUs to freeze CARE program post-enrollment verification (PEV) in the counties impacted by the California wildfires. PG&E expanded the CARE PEV freeze to customers in affected counties where a state of emergency proclamation was issued by the Governor of California due to a disaster that resulted in PG&E's inability to deliver utility services to customers and remains in place for one year from the date of the proclamation. D.19-07-015 extends PG&E's Emergency Consumer Protection Plan to include residential and non-residential customers in areas where a state of emergency proclamation is issued by the California Governor's Office or the President of the United States where the disaster has either resulted in the loss or disruption of the delivery or receiptof utility service, and/or resulted in the degradation of the quality of utility service.

[68] 2022 will be the final full program year in which PG&E applies the customer protections on a zip code level. Beginning in March 2023, PG&E will commence transitioning to apply the customer protections at a premise level, thereby increasing accuracy in application of the emergency protections.

CARE Table 2.6.1 CARE Program PEV Freezes			
Date of Proclamation	**Disaster Name**	**Affected Areas or ZIP Codes**	**Date when Protection Ends**
July 2022	Alisal Wildfire	Santa Barbara County	August 1, 2023
July 2022	Colorado Wildfire	93920, 93923, 93940	August 1, 2023
July 2022	Oak Wildfire	95338 and 95345	September 1, 2023
September 2022	Fork Wildfire	93643, 93644, 95338	November 1, 2023
September 2022	Mosquito Wildfire	95603, 95631, 95634	November 1, 2023
December 2022	Ferndale Earthquake	95501, 95503, 95521, 95519, 95540, 95536, 95562, 95570, 95542, 95546, 95573, 95525, 95560, 95551, 95524, 95528, 95547, 95553, 95565, 95518, 95549, 95556, 95554, 95555, 95558, 95569, 95589, 95564, 95526, 95537, 95571, 95511, 95559, 95514, 95545, 95550, 95502, 95563	February 1, 2024

2.7. Pilots

2.7.1. Community Post-Enrollment Verification (PEV) Pilot

CARE Post Enrollment Verification (PEV) Pilot Project

In June 2022, in coordination with other IOUs, PG&E started its CARE PEV Outbound Call Pilot, an outbound calling campaign designed to provide direct support to customers who submitted incomplete or incorrect CARE PEV documentation required to confirm their program eligibility. The outbound calling campaign also provided customers with information on other income-qualified energy savings programs that PG&E administers and/or has partnerships with.

From June through December 2022, PG&E CSRs contacted all 6,476 households that returned incomplete PEV documentation, and reached 2,969, or 46%, of the households. Of those households,1,387 PG&E customers successfully completed the PEV process, resulting in a cost of $56 per successful household, for a total pilot cost of $77,765.[69] The remaining balance for this pilot project is $2,235. As December 2022 marked the end of the six-month pilot, and with the budget nearly exhausted, PG&E plans to analyze these results in early 2023 to determine efficacy and recommend whether to continue a similar initiative in the future.

2.8. Studies

See ESA Section 1.8 of this report for details of the 2022 LINA Study.

[69] Per D.21-06-015, OP 13, PG&E's not-to-exceed budget for the pilot is $80,000.

Categorical Eligibility Study

D.21-06-015 authorized a Categorical Eligibility Study to be completed by December 2022,[70] and for the IOUs to file a joint Tier 2 AL 60 days after study completion, proposing an updated list of categorical programs for enrollment in the ESA, CARE, and/or FERA programs.[71] The study would also assess whether any recommended categorical programs would be suitable candidates for CARE or FERA automatic enrollment.

The study commenced in July 2022 with Evergreen Economics as the selected third-party consultant. A public workshop[72] was held in August 2022 to share the study's draft research plan and collect stakeholder feedback. After finalizing the research plan, the study consultant examined eligibility requirements and verification processes for 17 third-party programs that serve income-qualified households in California and compared them to CARE and ESA programs. These comparisons included assessments of income requirements, how incomes are defined, whose incomes in a household are considered, when and how applicant self-reports are verified through documentation requirements, and what alternate paths to entry exist. FERA participation is currently small and does not use the categorical eligibility, hence the focus of research and analysis is on CARE and ESA.

The assessment groups the 17 third-party programs into different categories in descending degree of alignment. Program assessment was under progress at the end of 2022, and interim findings are expected to be available in Q1 2023, with the study concluding in Q2 2023.

Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) Evaluation

D.21-06-015 requires the CHANGES program to be evaluated by an independent third-party and the first evaluation to begin no later than 12 months after Decision approval. The evaluation began in February 2022, with Opinion Dynamics as the selected evaluation consultant, and will be conducted for the 2019-2021 program period. The evaluation's study team consists of representatives from the CPUC Consumer Affairs Branch, ED and the IOUs.

This process evaluation of the CHANGES program is designed to cover five key areas: Overall Performance, Data Collection, Program Value, Program Costs, Funding, and Program Operations and Structure. To address the study's objectives, a mixed-methods approach was employed to leverage existing data sources and collect new primary data. Primary data will originate from in-depth interviews conducted with CPUC staff, IOUs, the program implementer, and select CBOs within the network managed by the program implementer. In addition, a mail survey will be conducted with PY 2021 program participants.

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[70] Letter granting Joint Utilities Extension of Time (from December 31, 2022 to June 30, 2023), under Commission Rule 16.6 to Comply with Ordering Paragraph (OP) 170 and OP 171 of D.21-06-015, dated October 27, 2022.

[71] D.21-06-015, OP 170.

[72] ESA/CARE/FERA Categorical Eligibility Study - Draft Work Plan. Evergreen Economics, September 2022.
https://pda.energydataweb.com/#!/documents/2661/view

In July 2022, a public workshop was held to present the draft research plan and solicit stakeholder feedback, before it was finalized[73]. Subsequently, in-depth interviews were conducted with different stakeholders through Fall 2022, and the draft program logic model was made available for review and improvements. Focus then shifted to the customer mail survey instrument, which was first drafted in English, then translated into four other most common languages spoken by CHANGES customers, including Chinese, Spanish, Vietnamese, and Korean. To encourage participation, a $25 gift card was provided to customers who returned the completed survey.

Due to delays experienced while preparing the survey instrument for fielding, the new launch timeline would have overlapped with the holiday season, which is not ideal for survey response rate. As a result, survey launch was held until early January and the response rate was high (at 8.8%). These data collection streams will inform multiple research questions scoped in the study, and draft results are expected by March 2023, with a study completion date of Q2 2023.

2.9. Miscellaneous

2.9.1. Describe outreach efforts contained in Attachment 6 of the Joint Stipulation adopted in D.21-06-015.

In PY 2022, PG&E complied with the terms of the Joint Stipulation adopted in D.21-06-015, which is primarily focused on integrating broadband affordable offer messaging into CARE/FERA/ESA messaging.

PG&E has an ongoing placement of a telephone number and link to the Internet for All Now website on www.pge.com/billhelp, a web page featuring information about a range of customer financial assistance programs and services.

PG&E exceeded the requirement to integrate broadband discount messaging twice annually and included messaging for the ACP in broad marketing campaigns targeted to income-qualified customers, as detailed below with campaign name and estimated customer reach:

- COVID-19 Relief Payment Plan support email
  - January 26, 2022: sent to approximately 366k residential customers
- Message integration in AMP Acquisition email
  - July 12, 2022: sent to approximately 43k residential customers
  - July 19, 2022: sent to approximately 43k residential customers
    - July 26, 2022: re-send to customers that did not open on July 12 or July 19
  - October 13, 2022: sent to approximately 50k residential customers
    - October 24, 2022: re-send to customers that did not open on October 13
  - December 15, 2022: sent to approximately 78k residential customers
    - December 21, 2022: re-send to customers that did not open on December 15

[73] 2022 CHANGES Evaluation - Final Research Plan and Comment Responses. Opinion Dynamics, July 2022. Available at: https://pda.energydataweb.com/#!/documents/2644/view

In addition to direct messaging, PG&E relied on the efforts of ESA contractors to further amplify the affordable internet messaging, via leaving behind an ACP flyer with customers during ESA enrollment.

In addition, PG&E provided messaging and training on affordable internet access to its CBO network. In 2022, PG&E held CBO trainings where the CA Emerging Technology Fund (CETF) was invited to present, one on September 29 and another on October 3.

In compliance with Joint Stipulation (e), PG&E notes that in 2022, approximately 74% of CARE customers had an email address on file.

3. CARE Expansion Program

3.1. Participant Information

3.1.1. Provide the total number of residential and/or commercial facilities by month, by energy source for the reporting period.

See Appendix A of this report: CARE Table 12 – CARE Expansion Program.

3.1.1.1. State the total number of residents (excluding caregivers) for residential facilities, and for commercial facilities, by energy source, at year-end.

Of the tenants residing within CARE expansion program qualified facilities, approximately 108,016 were receiving the electric CARE discount and 97,718 were receiving the gas CARE discount by December 31, 2022. This represents the total number of residents housed in all facilities, both residential and commercial.

3.2. Usage Information

3.2.1. Provide the average monthly usage by energy source per residential facility and per commercial facility.

PG&E provides the average monthly usage by energy source per facility in Appendix A of this report: CARE Table 12 – CARE Expansion Program.

3.3. Program Costs

3.3.1. Administrative Cost (Show the CARE expansion program's administrative cost by category)

The CARE expansion program's administrative cost by category was reported as part of the overall program administrative expenses. See Appendix A of this report: CARE Table 1 – CARE Overall Program Expenses.

3.3.1.1. Discount Information

3.3.1.2. State the average annual CARE discount received per residential facility by energy source.

PG&E's average annual CARE discount received per residential facility are stated below by energy source:

Residential Facility Gas Discount:	$253.56
Residential Facility Electric Discount:	$686.64

3.3.1.3. State the average annual CARE discount received per commercial facility by energy source.

PG&E's average annual CARE discount received per commercial facility are stated below by energy source:

Commercial Facility Gas Discount:	$2,909.74
Commercial Facility Electric Discount:	$7,909.74

3.4. Outreach – CARE Expansion

3.4.1. Discuss utility outreach activities and those undertaken by third parties on the utility's behalf.

For utility outreach activities and those undertaken by third parties on the utility's behalf, please see Section 2.4.1 of this report.

3.4.1.1. Discuss the most effective outreach method, including a discussion of how success is measured.

Section 2.4.2 describes PG&E's multi-channel marketing strategy, using a mix of channels and tactics such as direct mail, email, digital advertising, the bill package and others that work together to drive awareness, engagement, and enrollment. As further expounded on in Section 2.4.1, PG&E's 2022 strategies coupled this multi-channel marketing with deep investment in CBO outreach. While most CBO activities targeted residential customers, some CBO messaging, such as on social media, also reached group living facilities, agricultural employee housing, and other eligible nonprofit organizations.

3.4.1.2. Discuss how the CARE facility data and relevant program information is shared by the utility with other utilities sharing service territory.

PG&E does not currently exchange CARE facility data or expansion program information with other utilities in the shared service areas.

3.4.1.3. Discuss barriers to participation encountered in the prior year and steps taken to mitigate these, if feasible, or not, if infeasible.

PG&E did not encounter any barriers to participation in 2022.

3.4.2. Discuss any recommendations to improve the cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties on the utility's behalf to improve outreach and enrollment services to non-participating facilities in the prior year. Provide cost-effectiveness assessments, if available.

D.21-06-015 mandated that all utilities extend the certification period for CARE Expansion programs from two years to four years.[74] PG&E implemented this change in June 2022.

Because of a low number of applications received, (< 250 applications per year), there has not been a focus on improvement in processing applications.

3.5. Program Management

3.5.1. Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

PG&E did not experience any barriers that affected program management for 2022.

[74] D.21-06-015 at pg. 33.

4. Family Electric Rate Assistance (FERA) Program Executive Summary

2022 Family Electric Rate Assistance (FERA) Program | Summary of Results and Program Highlights

In 2022, PG&E estimated that over 174,219 of its customers were eligible for the FERA discount. By the end of 2022, PG&E had enrolled 36,652 customers, or 21% of the total eligible population within its service territory into the FERA program, including 12,679 new enrollments. 2022's enrollment totals represent an overall net decrease of 2,210 FERA customers over 2021's enrollment of 38,862 customers. Participating households in 2022 received average monthly bill discounts of approximately $38 for electric.

FERA Program Summary Table 3 provides a summary of PY 2022 program expenditures and activities.

FERA Summary Table 4
2022 FERA Program Summary

2022	Authorized Budget	Actual	%
Administrative Expenses	$2,794,400	$2,850,749	102%
Subsidies and Benefits	$12,898,000	$17,196,193	133%
Total Program Costs and Discounts	**$15,692,400**	**$20,046,942**	**128%**
2022 FERA New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc.**	**Self-Certified as Categorically Eligible**	**Self-Certified as Income Eligible**
By Method	164	n/a	12,681
2022 FERA Enrollment	**Estimated Eligible Participants**	**Participants**	**Enrollment Rate**
Total Enrolled	**174,219**	**36,652**	**21%**

D.21-06-015 set an enrollment goal for 40% enrollment by the end of 2022. PG&E's FERA program reached only 21% enrollment by year end, significantly below the 40% goal, and off track to meet 2023's 50% enrollment goal, despite PY 2022's investment of $2.8M in marketing and outreach. This shortfall is primarily due to well-identified structural program barriers, such as the small eligible population and the narrow income differentiation of $1 between FERA and CARE eligibility.

Because FERA continues to be under-enrolled, PG&E's primary activities in 2022 for FERA centered around continuing existing marketing efforts and channels, expanding CBO marketing partnerships, and exploring opportunities for improved program enrollment and retention outcomes.

The FERA program's noteworthy marketing, outreach, and administrative initiatives and achievements in 2022 included:

- In response to feedback from its CBO advisory groups and other program stakeholders, PG&E proactively created a new FERA CBO pilot, representing a significant and long-term investment in the belief that there is a potential for community partners to help reach the FERA-eligible population.
- PG&E led the IOUs' coordination efforts with the ED to highlight enrollment challenges and explore new initiative development.

- PG&E's program team worked with a contracted Lean coach[75] to identify barriers and possible pathways to improve enrollment outcomes.

Despite PG&E's focused and consistent efforts, and launching new endeavors such as the FERA CBO pilot, FERA enrollment continued to lag behind program goals. Early results of the FERA CBO pilot indicate that CBOs are actually not reaching/serving the FERA eligible niche segment. PG&E will need all stakeholders' creative ideas to identify new strategies in an attempt to meet FERA's enrollment goals in future program years, since marketing efforts and engagement of CBOs are not delivering the desired outcome.

Procedural Background

The FERA program provides a monthly 18% discount on electric bills for qualifying households of three or more individuals throughout PG&E's service area.[76] Unlike CARE which provides both an electric and a gas bill discount, FERA only offers an electric bill discount.

D.21-06-015 authorized PG&E's FERA administrative and subsidy budgets for PYs 2021-2026, and set a FERA enrollment goal of at least 40% in PG&E's service territory by the end of 2022.[77]

4.1. Participant Information

4.1.1. Provide the total number of FERA customers By Month for the Reporting Period.

FERA Table 4.1.1 2022 Total Number of FERA Enrolled Customers[a]	
January	39,800
February	39,689
March	39,907
April	39,730
May	39,278
June	38,948
July	36,643
August	36,324
September	36,961
October	36,770
November	36,873
December	36,652

[a] The "FERA Enrolled" column reflects the cumulative number of customers in the relevant month that received the discount and excludes sub-metered accounts.

[75] PG&E adopted a Lean Operating System and management structure in 2022, which is a data-driven, operational system designed to drive effective and responsive decision-making.

[76] To qualify for the FERA discount, a residential customer's household income must be at 200 percent plus $1 to 250 percent of Federal Poverty Guidelines, as required in D.05 10 044 and per Public Utilities Code Section 739.12.

[77] D. 21-06-015, Attachment 1, Tables 3 and 4.

4.1.2. Provide the total number of FERA-eligible households, FERA-participating households, and FERA household enrollment rates by quarter.

FERA Table 4.1.2 2022 FERA Program Enrollment Rate			
2022 Quarter Ending	**(Estimated) FERA Eligible Households[a]**	**FERA Participating Households**	**FERA Household Enrollment Rate[b]**
March 31	174,219	39,907	23%
June 30	174,219	38,948	22%
September 30	174,219	36,961	21%
December 31	174,219	36,652	21%

[a] Updated February 2022 based on information from U.S. Department of Health and Human Services, and as reflected for CARE in filing A.19-11-003, et al., Annual CARE Eligibility Estimates filed February 14, 2022.
[b] The FERA household enrollment rate is calculated by dividing FERA Participating Households by FERA-Eligible Households.

4.1.3. Discuss how the estimates of current FERA-eligible households were developed.

See PG&E's response to Section 2.1.2.2 of this report. The methodology is based on estimating small area (block group) level household size by income and householder age tabulations for the current year and connecting these estimates with small area counts of households. FERA eligibility estimates are then limited to household sizes of three or more that are receiving PG&E's electric service. Block group/utility-specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area: ZIP+2, ZIP, tract, county, territory, etc. Statewide estimates, regardless of utility boundaries, are also provided at small and large area levels.

4.1.4. Provide the current FERA sub-metered tenant counts at year-end.

There were 176 sub-metered tenants enrolled in FERA at year-end.

4.1.5. Discuss any problems encountered during the reporting period administering the FERA program for sub-metered tenants and/or master-meter customers.

No problems were encountered during this reporting period.

4.2. FERA Program Costs

4.2.1. FERA Discount Costs

4.2.1.1. State the average monthly FERA discount received, in dollars, per FERA customer.

The average monthly FERA discount received per FERA customer in 2022 was $37.85

4.2.1.2. State the cumulative annual discount for all FERA customers.

The cumulative annual discount for all FERA customers in 2022 was $17,196,193.

4.2.2. FERA Administrative Costs

4.2.2.1. Show the FERA program's administrative cost by category.

FERA Table 4.2.2.1 FERA Administrative Costs by Category and Benefits	
Category	**Cost**
Outreach	$2,792,378
Processing, Certification and Verification	$8,838
General Administration	$49,533
Total Program Costs	**$2,850,749**
Customer Benefits	**$17,196,193**
Total Program Costs and Customer Benefits	**$20,046,942**

4.2.2.2. Explain what is included in each administrative cost category.

Outreach
This category includes costs related to direct mail, email, paid media, bill inserts, applications (printing and mailing), postage, sub-metered outreach, information technology (technical support and software licensing), staff labor, event staffing, website design, and other outreach.

Processing, Certification and Verification
This category includes costs related to staff labor for application processing, certification, recertification, and training. PG&E has automated its certification and recertification processes; therefore PG&E did not incur labor costs in this category.

General Administration
This category includes costs related to office supplies, printing, program management labor, travel expenses, conference, training, and information technology (technical support and software licensing).

Customer Benefits
This category includes costs related to rate discounts.

4.2.2.3. Explain how costs of joint CARE/FERA activities are charged to each program.

For joint CARE/FERA activities, PG&E charges the expenses to the appropriate CARE/FERA order numbers based on the nature of the activities and the number of staff hours spent on each program.

4.2.2.4. Provide the year-end December 31 balances for the FERA balancing account for both the current and prior reporting periods.

The 2022 year-end balance for the FERA balancing account was $20,648,177. This represents an increase of 22% over 2021's year-end balance of $16,953,148, and is the result of a higher monthly discount provided to FERA customers in 2022 as a result of higher rates.

4.3. Marketing, Education and Outreach

4.3.1. Discuss utility outreach activities and those undertaken by third parties on the utility's behalf.

PG&E continued to prioritize FERA outreach efforts in 2022. Marketing and outreach engaged customers through multiple channels such as digital media, direct mail, email, and via CBOs to increase reach and awareness.

Ongoing test plans and new campaign strategies were executed throughout the year, and included a new monthly direct marketing campaign, an "Always-On" paid media campaign, creative message and format tests, and use of new channels to target FERA messaging to potentially eligible customers. PG&E also conducted messaging research with customers who previously received marketing messages but did not enroll to inform new FERA creative development. Finally, to mitigate the attrition impact of the recertification process, greater focus was placed on communications to encourage retention of enrolled FERA customers.

Additionally, in response to informal feedback from its advisory groups, the LIOB, and other stakeholders, PG&E has proactively invested in CBOs as an avenue to support FERA enrollment. In July 2022, PG&E launched a FERA CBO Pilot utilizing six newly contracted CBOs to begin supporting ME&O efforts. The FERA CBO Pilot initiative, which is additive to the existing FERA capitation program, is designed to offer CBOs longer-term (18-month) contracts, a substantive contract dollar amount to fund extensive staff time on-the-ground, and engage CBOs in driving FERA awareness and enrollments, while also promoting other supporting programs. To date, the FERA CBO pilot has not been successful in driving significant increases in FERA enrollment as most households the CBOs are contacting end up enrolling in CARE. This experience corroborates PG&E's marketing outcomes in which the majority of customers targeted for FERA who submit an application, end up enrolling in CARE. The challenges of the CBOs are the same as general marketing of the program: there is a very small eligible pool and a narrow income eligibility range.

Examples of PG&E's FERA marketing materials are shown in Appendix F of this report – FERA Marketing Materials.

Key Findings:

- Compared to 2021, the 2022 FERA customer profile shifted to look more like the pre-pandemic profile which skews towards lower income customers with higher bills.
- PG&E's new 'Never Targeted' acquisition campaign generated higher enrollment rates compared to the previous quarterly campaign.

- FERA specific marketing campaigns to the expected FERA eligible target audience continue to drive CARE enrollment at a ratio of approximately 8:1.
- Remarketing FERA to previously enrolled customers had higher enrollment rates for CARE than for FERA.
- FERA marketing non-responders[78] had low awareness of most PG&E programs.
- Digital media campaigns drove strong CTRs and traffic to the landing page.
- New channel testing showed promise for increasing the recertification rate.
- CBOs participating in marketing, education, and outreach pilots have been unsuccessful at finding FERA eligible customers, likely due to the very small pool of customers who are eligible for FERA.

Despite considerable marketing and outreach effort to target FERA eligible customers, PG&E is not realizing the volume of new enrollments needed to grow the FERA enrollment rate. Enrollment barriers and mitigation efforts are further discussed in Section 4.3.2.2.

General Awareness

FERA Customer Profile
Year over year comparison of the FERA customer profile shows that 2022 enrollees shifted even further to look more like the pre-pandemic 'normal' which skews towards lower income customers with higher bills.

Compared to 2021 FERA enrollees, FERA enrollees in 2022 are more likely to be customers with higher electric and gas bills. 2022 FERA enrollees are also more likely to have two adults in the household, have slightly lower income, shorter PG&E account tenure of 1-3 years and live in the Fresno or Stockton areas. Like the 2022 CARE profile (Section 2.4.1).

Direct Communications

FERA Direct Marketing
PG&E continues to see a higher rate of CARE enrollment for FERA targeted marketing campaigns. FERA direct campaigns overall drove approximately eight CARE enrollments for every one FERA enrollment in 2022. Over 1.3M customers were targeted with FERA direct mail and/or email, generating over 2,600 FERA enrollments (approximate .0.20% enrollment rate). Additionally, FERA direct marketing drove over 2,000 CARE enrollments (approximate 1.7% enrollment rate). A total campaign enrollment rate of approximately 2.0% is in line with expectations.

In June 2022, PG&E launched a new, monthly direct marketing campaign to "Never Targeted" customers. The Never Targeted audience consisted of customers who had never received a CARE/FERA direct marketing campaign. Each month, the campaign selected Never Targeted customers with a model decile score of 1-3. Customers received up to three communications over a

[78] Non-responders are defined as customers who received two or more CARE or FERA direct marketing campaigns within the past 24 months but did not enroll.

period of about seven months. If the customer did not enroll after three communications, they were moved into the "Non-Responder" segment. The Never Targeted campaign generated much higher enrollment rate for both CARE and FERA compared to the quarterly campaign deployed in Q1 2022 (CARE: 3.48% vs. 1.02%, FERA: 0.27% vs. 0.13%).

In addition to the monthly acquisition campaign, PG&E resumed quarterly campaigns targeted to customers who failed to recertify for FERA after recertification requirements were paused as part of the COVID-19 emergency customer protections that ended June 2021. The Failed to Recertify (FTR) campaigns have the highest enrollment rates (4.0% FERA enrollment rate for Q1-Q3 campaigns).

The FTR campaign results help to highlight the ongoing challenge to increase FERA enrollment. Even when remarketing the FERA program using FERA specific marketing communications to previously enrolled customers, the campaign generates significantly more CARE enrollments. Of the over 7,000 customers contacted for the FERA FTR campaigns, 69% of the enrollments generated were for CARE.

Non-Responder Message Research and Creative Development

In 2022, PG&E conducted FERA messaging research, sending a brief online survey to approximately 30,000 customers who previously received FERA marketing but did not enroll.

More than 950 customers responded and were randomly shown one of six variations of FERA messages (each message was viewed and rated by approximately 148-179 customers). Customer responses indicate that FERA awareness continues to lag behind CARE (31% of respondents indicated awareness of FERA vs. 40% aware of CARE). Another third of respondents stated they were not aware of any of the programs listed.[79]

Of those customers who indicated they were aware of FERA, 91% have never applied for the program, and 81% have never applied for CARE. The primary reason cited for not applying is the belief they do not qualify, with 77% stating they did not meet the qualifications and 23% stating they did not think they would qualify.

About half of respondents indicated intent to open most of the envelopes based on the opportunity to save money, and felt the message was simple and clear. However, customers that viewed the version that led with the message about having three or more people were less likely to indicate that they would open the envelope (59% of respondents indicate less than three people in the household).

When shown the letter versions, customers rated the clarity of the message high, but appeal and intent to visit the website to act was low. Customer

[79] Survey Question: Which of the following PG&E programs, if any, are you aware of? Select all that apply. Options shown: Medical Baseline (44%), CARE (40%), Budget Billing (38%), ESA Program (35%), FERA (31%), None of the above (30%)

interest wanes once they see income guidelines table on the letter and determine they will not qualify for the program.
These results were not surprising given that non-responder audiences may be less aware since they may discard communications without reviewing the message. Additionally, the small eligible population for FERA means that when casting a wide net to reach potential customers, PG&E inevitably reaches customers who are not eligible for the program.

The insights and top-rated message from the research were used to develop a new FERA direct mail and email for testing with the non-responder audience. In November, the new email version was deployed to approximately 180,000 customers who previously received CARE or FERA direct marketing but did not enroll. Additionally, the direct mail version was created in three print formats for split testing. The test included a traditional letter package versus an oversized postcard versus a self-mailer.

Non-Responders had a significantly lower enrollment rate for both CARE and FERA programs. However, based on the deployment date in mid-November, the campaign enrollment window extends into 2023. PG&E plans to review results in 2023 to compare against previous non-responder targeted campaigns. Lessons learned will inform planning for future campaigns targeting the non-responder audience.

Digital

Paid Media Summary
The "Always-On" digital media campaign remained an important element of the FERA marketing strategy. PG&E deployed an integrated campaign that ran January through December, using a mix of paid digital media tactics including search, Google Discovery (Gmail) ads, display and native ads (for example, ads that appear as sponsored on a site or page with similar/relevant content).

The campaign saw ongoing improvement in performance metrics, delivering over 102M impressions. Impression volume increases were led by display and native ads. The strong impression volume drove clicks and landing page visits beyond the annual media plan goal. The campaign drove over 605,000 clicks, with a CTR of 0.59%, an improvement from the prior year's 0.25% CTR. Resulting landing page visits (381,953) exceeded plan projections by 119%.

Hard-to-Reach Summary
PG&E continued targeted digital spending increases in 165 ZIP Codes as part of the ongoing effort to increase awareness with Hard-to-Reach customers. ZIP Codes were identified as Hard-to-Reach based on areas of estimated FERA eligibility, and those that were in designated rural and/or high poverty areas.[80]

[80] A High Poverty household has income at or below 100 percent of the Federal Poverty Level Guidelines. Rural areas are defined as those isolated from larger metropolitan areas, by distance or other physical features. PG&E has identified specific zip codes and counties within PG&E's territory that fall within these definitions for targeting purposes. The 2022 Hard-to-Reach zip code targeting list included 165 prioritized zip codes which target FERA eligible, non-enrolled, Rural and High Poverty customers.

When comparing the enrollment rates for areas with increased spending, ZIP Codes with increased media spend had 21% higher FERA enrollment rates[81].

Results provide directional indication that the additional FERA media spend in the FERA Hard-to-Reach areas may be driving improved enrollment rates. However, tests would need to be designed and deployed to isolate the increased FERA media spend to be the sole contributor.

Social Media
PG&E's 2022 CARE/FERA marketing plan did not include social media outreach. In 2022, some of PG&E's CBO partners in its ME&O Pilot and FERA CBO Pilot (as described in the Executive Summary and Section 4.3.1), used their social media accounts to reach constituents with information about programs including CARE/FERA, ESA, LIHEAP, and other complementary offerings.

Bill Inserts
The annual CARE/FERA bilingual bill insert took place in June 2022 and included the annually updated income guidelines. All customers receiving paper bills received the bilingual application in their PG&E bill, while paperless bill customers were provided a link to view monthly bill inserts.

Retention Campaigns
PG&E continued testing additional communication channels as part of the Recertification Reminder campaign, including SMS/text message and outbound automated calls. As part of the ongoing test, some customers due to recertify received a call or a text message at 120-days and 30-days prior to the program end date.

Customers who received an automated call had a higher recertification rate than the control cells (customers who did not receive the additional call reminders), indicating that the addition of the call had a positive impact on retention.

In Q3 2022, the audience for the text testing was expanded to ensure as many customers as possible were receiving text reminders and to allow data levels to achieve statistical significance (i.e. testing a higher volume of customers to accurately analyze results). Analysis is planned for 2023 to evaluate the impact of the addition of a text reminder on recertification rate once enough customers have completed the full recertification communication journey. The lessons learned from testing will inform recommendations for ongoing campaign optimization.

To further support program retention and improve the customer experience, PG&E began development of an enhanced CARE and FERA welcome campaign. The campaign will deploy to newly enrolled and re-enrolling customers, providing timely communication of the program savings benefit, program guidelines and how to monitor savings each month to demonstrate the value of being enrolled. The communications will be personalized with dynamic content including information about other relevant cost and energy saving programs based on customer data attributes and eligibility. The new version of the Welcome campaign is planned for launch in Q1 2023.

[81] FERA Enrollment Rate = # FERA enrollments that can be attributed to campaigns/# Total campaign recipients

Earned Media

Throughout 2022, PG&E's income-qualified programs garnered several earned media stories, across general market and multicultural media outlets. Coverage included live and pre-recorded radio interviews and programming for stations such as:

- **Cuerpo Corazon Comunidad Radio:** program focused on safety and health resources for Spanish-speaking communities in and around Marin County.
- **KZSF Radio:** covering Santa Clara, San Mateo, Alameda and Contra Costa counties.
- **KIQI Radio:** serving Central and Northern California's Latino community.

Partner Education and Outreach

Community Based Organization Partner Network

As described in the Executive Summary and earlier in Section 4.3.1, in response to informal feedback from various stakeholders, PG&E has proactively invested in CBOs as an avenue to support FERA enrollment. In July 2022, PG&E launched a FERA CBO Pilot utilizing six newly contracted CBOs to begin supporting ME&O efforts. In addition to promoting and helping to enroll customers in FERA, the CBOs are also promoting other supporting programs such as Medical Baseline, SmartAC, Power Saver Rewards, WatterSaver, AMP, and others. To date, the FERA CBO pilot has not been successful as almost all households the CBOs are contacting end up enrolling in CARE.

CARE Capitation Agencies

In 2022, PG&E had contracts with 26 CARE COCs to help enroll customers into the CARE and FERA program. While most enrollments continue to be CARE, the COCs continue to try to reach FERA eligible customers. In 2022, PG&E received five FERA applications through the COC program, resulting in four new enrollments. PG&E will continue its partnership with these CBOs in 2023 and is looking to expand the number of COCs it currently partners with in this program.

Community Engagement

Events, Presentations, Workshops

In addition to many community events hosted by its CBO partners, PG&E participated in local outreach opportunities to promote CARE, FERA and other assistance programs. PG&E hosted several webinars and in-person workshops in partnership with local organizations such as the Mexican Consulate in Fresno and the Community Youth Center (CYC) in San Francisco. PG&E also hosted a booth at the CA State Fair and included FERA outreach.

Branch Offices and Customer Care Centers

PG&E's Customer Service Offices were closed across the service territory in 2022. Therefore this is not applicable for the reporting period.

Direct Marketing

Outbound Calls

PG&E orchestrated a direct calling campaign to customers with past due balances throughout 2022, notifying them of programs and resources available to assist, including FERA. See CARE section 2.4.1, Outbound Calling Assistance for complete 2022 results.

4.3.2. Discuss each of the following:

4.3.2.1. Discuss how FERA customer data and other relevant program information is shared within the utility, for example, between its Energy Savings Assistance Program and other appropriate low-income programs.

The FERA discount is recorded directly into the customer information system. This allows CSRs to see the FERA status of any customer calling PG&E's contact center for assistance. This provides valuable information for the CSR to use when discussing other benefits and services that may be of assistance to the income-qualified customer. The FERA program also uses the same system database as the CARE program. Therefore, relevant program information is shared between CARE, ESA, and other low-income programs. When FERA customers became eligible for the ESA program on July 1, 2022, direct referrals to ESA commenced.

4.3.2.2. Discuss barriers to participation encountered during the reporting period and steps taken to mitigate them.

Below are PG&E's observed barriers to participation and mitigation steps. Because these barriers are based on observation and experience, PG&E supports a third-party evaluation and study to gather evidence allowing for determination of the barriers. PG&E began the groundwork for this potential Barriers study in 2022 and plans to lead coordination of it with the other IOUs and ED in 2023. To highlight and elevate the challenges in meeting program enrollment goals, in Q3 2022, PG&E began leading the coordination of a quarterly ED-IOU meeting to discuss FERA enrollment outcomes, plans, and ideas for modifications or new initiatives to try and increase enrollment and/or retention. In addition to the barriers study idea, the group is reviewing a range of other new pilot initiatives for feasibility of implementation.

Structural Barriers

- There is a very small eligible pool for FERA and a narrow income eligibility range, which makes marketing the program a challenge.

Mitigation Steps:

- PG&E introduced targeted, data-driven marketing.
- PG&E established partnerships with other PAs to obtain FERA customers directly, such as through its direct enrollment process with the DAC-SASH program administrator GRID Alternatives to receive verified income for FERA enrollment. However, the scale of the DAC-SASH program limits how impactful these FERA enrollments can be toward the overall FERA program enrollment goal.

Outreach Barriers

- The target audience responds more favorably to trusted messenger, and the small eligible population makes accurate targeted marketing difficult.

Mitigation Steps:

- Ongoing testing of marketing messages, channels and tactics.
- Deep investment in CBO outreach contracts, per informal recommendations of stakeholders including LIOB, and Advisory Groups.

Barriers to Retention with Existing Enrollees

- The high non-response rates in recertification and PEV processes drives attrition and reduces overall program enrollment.

Mitigation Steps:

- New communication initiatives for recertification, such as text reminders.
- Analysis of CARE PEV outbound calling pilot to determine applicability to FERA in 2023.
- Establishment of the CARE/FERA PEV Sub-working group of the ESA WG in December 2022 to help improve PEV and recertification outcomes in 2023.

4.4. Processing FERA Applications

4.4.1. Processing self-certification and self-recertification applications (individual and sub-metered customers)

4.4.1.1. Provide the number of utility and third-party FERA self-certification and self-recertification applications provided, received, approved, denied, pending/never completed, or duplicates for the reporting period.

See Appendix A of this report: FERA Table 4 – FERA Self-Certification and Self-Recertification Applications.

4.4.2. Processing Random Post-enrollment Verification Requests

4.4.2.1. Provide the total number of verifications requested, received, approved, denied, pending/never completed, or duplicates, for the reporting period.

See Appendix A of this report: FERA Table 5 – FERA Enrollment by County.

4.5. Program Management

4.5.1. Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

Program Attrition

Program attrition from the recertification process resulted in a 6% decrease in overall enrollment in 2022. Results from 2022 underscore the challenge to effectively retain customers once they are enrolled in the FERA program.

To address the attrition issue, PG&E refined paid media campaigns and direct marketing, expanded FERA recertification text efforts, updated the www.pge.com website with FERA information, increased the prominence of FERA messages across all marketing channels, awarded six CBOs to conduct grassroots outreach and education. PG&E joined with other IOUs in forming the CARE/FERA PEV Sub-working group in December 2022, and looks forward to working with stakeholders in 2023 to identify opportunities for improvement in program retention.

4.5.2. Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

The High Usage FERA PEV process re-started in November 2022 (after being paused for COVID-19 protections initially implemented in 2020); therefore, there are insufficient results to report for PY2022. The non-high usage FERA PEV will start in 2023.

5. Fund Shifting

5.1.1. Report ESA program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

PG&E's fund shifting activities in 2022 included:

- Fund shifting $23,579,933 from electric budget categories to gas budget categories.
- Fund shifting $2,015,050 from electric budget categories to electric budget categories.
- Fund shifting $4,418,911 from gas budget categories to gas budget categories.
- Carried forward $28,254,243 from 2021 to 2022 for Pilot, Studies, MF SPOC, MF CAM, and CSD Leveraging budget categories.
- Carried forward $47,750,475 from 2022 to 2023 for Pilot, Studies, MF SPOC, MF CAM, and Pilot Plus and Pilot Deep budget categories.

Detailed information can be found in Appendix A of this report: ESA Table 12 – Fund Shifting.[82]

5.1.2. Report CARE fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

PG&E's CARE fund shifting activities in 2022 included moving $1,053,438 from the Outreach category to IT Programming category, $367,854 from the Outreach category to the CHANGES Program category, and $45,682 from the Outreach category to Studies and Pilots category.[83]

5.1.3. Report FERA fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015

PG&E's FERA fund shifting activities in 2022 included moving $160,930 from Processing, Certification, Recertification, Post Enrollment Verification, Regulatory Compliance, and General Administration budget categories to Outreach budget category.[84]

5.1.4. Was there any ESA, CARE or FERA program fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 10.5.8.2 of D.21-06-015?

There was no ESA, CARE or FERA program fund shifting activities that occurred in 2022 that fell outside of the fund shifting guidelines in D.12-08-044, as updated in D.16-11-022, D.17-12-009, and D.21-06-015.

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[82] In compliance with D.12-080-44, as updated in D.16-11-022, D.17-12-009 and D.21-06-015.

[83] In compliance with D.12-08-044, as updated in D.16-11-022, D.17-12-009 and D.21-06-015.

[84] In compliance with D.21-06-015.

6. PG&E's Commonly Used Acronyms and Abbreviations

AB	Assembly Bill
AC	Air Conditioning
ACP	Affordable Connectivity Program
AEA	Association for Energy Affordability
AL	Advice Letter
AMI	Advanced Metering Infrastructure
AMP	Arrearage Management Plan
BayREN	Bay Regional Energy Network
BPI	Building Performance Institute
CAM	Common Area Measure
CARE	California Alternate Rates for Energy
CBO	Community-Based Organization
CCA	Community Choice Aggregators
CHANGES	Community Help and Awareness of Natural Gas and Electric Services Program
CISM	California Installation Standards Manual
COC	Community Outreach Contractor
CPUC	California Public Utilities Commission
CSD	California Department of Community Services and Development
CSO	Customer Service Office
CSR	Customer Service Representative
CTR	Click-Through-Rate
CWR	Community Workforce Resources
D.	Decision
DAC	Disadvantaged Communitity
DR	Demand Response
ED	Energy Division
EE	Energy Efficiency
ESA	Energy Savings Assistance
ESJ	Environmental and Social Justice
EUI	Energy Use Intensity
FAQ	Frequently Asked Question
FERA	Family Electric Rate Assistance
FPG	Federal Poverty Guideline

FPL	Federal Poverty Level
GHG	Greenhouse Gas
HER	Home Energy Report
HU	High Usage
HVAC	Heating, Ventilation, and Air Conditioning
IOU	Investor-Owned Utility
IQP	Income-Qualified Program
kW	Kilowatt
kWh	Kilowatt Hour
LIHEAP	Low Income Home Energy Assistance Program
LINA	Low Income Needs Assessment
LIWP	Low Income Weatherization Program
M	Millions
M&O	Marketing and Outreach
MBL	Medical Baseline
ME&O	Marketing, Education and Outreach
MF	Multifamily
MFWG	Multifamily Working Group
MHP	Mobile Home Park
mWh	Megawatt Hour
NDR	Non-Deed Restricted
NEB	Non-Energy Benefit
NGAT	Natural Gas Appliance Testing
NMEC	Normalized Metered Energy Consumption
OP	Ordering Paragraph
P&P	Policies and Procedures
PEP	Personalized Energy Profile
PEV	Post-Enrollment Verification
PG&E	Pacific Gas & Electric Company
PP/PD	Pilot Plus/Pilot Deep
PPE	Personal Protective Equipment
PSPS	Public Safety Power Shutoff
PY	Program Year
Q1	First Quarter
Q2	Second Quarter
Q3	Third Quarter

Q4	Fourth Quarter
REACH	Relief for Energy Assistance through Community Help
RFP	Request for Proposal
RHA	Robert Heath and Associates
RTR	Response to Recommendation
SASH	Single Family Affordable Solar Homes
SB	Senate Bill
SCE	Southern California Edison
SDG&E	San Diego Gas and Electric Company
SGIP	Self-Generation Incentive Program
SF	Single-Family
SJV	San Joaquin Valley
SoCalGas	Southern California Gas Company
SPOC	Single Point of Contact
SWG	Sub-Working Group
TANF	Tribal Temporary Assistance for Needy Families
TOU	Time-of-Use
UAS	Universal Application System
VEC	Virtual Energy Coach
WCP	Water-Energy Coordination Program
WE&T	Workforce Education and Training
WG	Working Group

7. Appendix A: PG&E's 2022 ESA, CARE and FERA Program Tables

ESA, CARE and FERA	Summary Highlights
ESA Summary Table 1	Expenses Summary
ESA Table 1B	Energy and Demand Savings Summary
ESA Table 1	ESA Main Overall Program Expenses
ESA Table 1A	Program Expenses Summary
ESA Table 2	ESA Main Expenses and Energy Savings by Measures Installed (SF, MH, MF In-Unit)
ESA Table 2A	MF CAM Initiative Expenses and Energy Savings by Measures Installed
ESA Table 2B	MFWB Expenses and Energy Savings by Measures Installed
ESA Table 2C	PP/PD Expenses and Energy Savings by Measures Installed
ESA Table 2D	Building Electrification Expenses and Energy Savings by Measures Installed (SCE Only)
ESA Table 2E	Clean Energy Homes Expenses and Energy Savings by Measures Installed (SCE Only)
ESA Table 2F	CSD Leveraging Expenses and Energy Savings by Measures Installed
ESA Table 3	Program Cost Effectiveness
ESA Table 4	Detail by Housing Type and Source
ESA Table 5	Direct Purchases & Installation Contractors
ESA Table 6	Installation Cost of Program Installation Contractors
ESA Table 7	Expenditures Recorded by Cost Element
ESA Table 8	Homes Unwilling / Unable to Participate
ESA Table 9	ESA Main Life Cycle Bill Savings by Measure (SF, MH, MF In-Unit)
ESA Table 9A	ESA MF CAM Life Cycle Bill Savings by Measure
ESA Table 9B	ESA Pilot Plus and Pilot Deep Life Cycle Bill Savings by Measure
ESA Table 9C	Building Electrification Life Cycle Bill Savings by Measure (SCE Only)
ESA Table 10	Energy Rate Used for Bill Savings Calculations
ESA Table 11	Bill Savings Calculations by Program Year
ESA Table 12	Fund Shifting
ESA Table 13	Categorical and Other Enrollment
ESA Table 14	Leveraging & Integration
ESA Table 14A	Clean Energy Referral, Leveraging, and Coordination

Pacific Gas and Electric Company
Energy Savings Assistance (ESA) Program
California Alternate Rates for Energy (CARE) Program and
Family Electric Rate Assistance (FERA) Program
2022 Summary Highlights

ESA Program

2022 ESA Program Summary [1]

2022	Authorized / Forecasted Planning Assumptions	Actual	%
Budget	$ 180,979,812	$ 133,229,337	74%
Summary Homes Treated	59,340	67,567	114%
Summary kWh Saved	15,093,167	26,357,716	175%
Summary kW Demand Reduced	2,859	5,555	194%
Summary Therms Saved	629,105	1,280,976	204%

[1] This includes all programs for the reporting period Main ESA, MF In-Unit, MF CAM, MFWB, Pilot Plus and Pilot Deep, Building Electrification, Clean Energy Homes, CSD Leveraging.

CARE Program

2022 CARE Program Summary

2022	Authorized Budget	Actual	%
Administrative Expenses	$ 13,760,000	$ 11,096,396	81%
Subsidies	$ 687,689,000	$ 985,381,958	143%
Service Establishment Charge	$ -	$ -	n/a
Total Program Costs and Discounts	**$ 701,449,000**	**$ 996,478,354**	142%
2022 CARE New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc**	**Self Certified as Income or Categorically Eligible**	**Self Certified as Recertification**
Method	13,061	210,145	646,405
2022 CARE Enrollment Rate	**Estimated Eligible Participants**	**Participants**	**Enrollment Rate**
Total Enrolled	**1,401,702**	**1,469,724**	**105%**

FERA Program

2022 FERA Program Summary

2022	Authorized Budget	Actual	%
Administrative Expenses	$ 2,794,400	$ 2,850,749	102%
Subsidies	$ 12,898,000	$ 17,196,193	133%
Service Establishment Charge	$ -	$ -	n/a
Total Program Costs and Discounts	**$ 15,692,400**	**$ 20,046,942**	128%
2022 FERA New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc**	**Self Certified as Income or Categorically Eligible**	**Self Certified as Recertification**
Method	164	12,679	10,460
2022 FERA Enrollment Rate	**Estimated Eligible Participants**	**Participants**	**Enrollment Rate**
Total Enrolled	**174,219**	**36,652**	**21%**

ESA Summary Table 1 - Expenses Summary
Pacific Gas and Electric Company
Program Year 2022 Annual Report

ESA Program Expenses:	Authorized Budget			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Main Program (SF and MH) [1]	$ 63,189,150	$ 55,402,451	$ 118,591,601	$ 43,660,184	$ 79,501,767	$ 123,161,951	69%	143%	104%
ESA Multifamily In-Unit [2]	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
ESA Multifamily Common Area Measures	$ 30,413,070	$ 17,347,343	$ 47,760,413	$ 2,376,762	$ 3,933,141	$ 6,309,903	8%	23%	13%
ESA Multifamily Whole Building [3]	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
ESA Pilot Plus and Pilot Deep	$ 4,637,129	$ 4,112,170	$ 8,749,299	$ 481,113	$ 426,647	$ 907,761	10%	10%	10%
Building Electrification Retrofit Pilot [4]	-	-	-	-	-	-	0%	0%	0%
Clean Energy Homes New Construction Pilot [4]	-	-	-	-	-	-	0%	0%	0%
CSD Leveraging	$ 2,503,978	$ 1,467,786	$ 3,971,764	$ 815	$ 723	$ 1,538	0%	0%	0%
MCE Pilot	$ 689,000	$ 611,000	$ 1,300,000	$ 1,378,000	$ 1,222,000	$ 2,600,000	200%	200%	200%
SPOC	$ 418,485	$ 188,250	$ 606,735	$ 131,538	$ 116,647	$ 248,185	31%	62%	41%
SASH and MASH Unspent Funds [5]	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
ESA Program TOTAL	**$ 101,850,812**	**$ 79,129,000**	**$ 180,979,812**	**$ 48,028,412**	**$ 85,200,926**	**$ 133,229,337**	47%	108%	74%

[1] Budget for PY 2022 for entire portfolio, including ESA Main and Multifamily In-Unit.
[2] PG&E does not account for the ESA Main Program and ESA Multifamily In-Unit costs separately and cannot provide a breakout at this level of detail. As a result, the ESA Multifamily In-Unit authorized and actual costs are included in the ESA Main Program category in 2022.
[3] Implementation to occur no earlier than January 2023.
[4] Pilots are applicable to SCE only.
[5] OP 12 of D.15-01-027 states "The Program Administrators shall ensure that program expenditures in each utility's service territory do not exceed the total authorized budget amounts over the duration of the programs. The program incentive budgets will be available until all funds are exhausted or until December 31, 2021, whichever occurs first. Any money unspent and unencumbered on January 1, 2022, shall be used for "cost-effective energy efficiency measures in low-income residential housing that benefit ratepayers," as set forth in Public Utilities Code Section 2852(c)(3)." The electric IOUs plan to file a Joint Advice Letter for disposal of unspent funds from the SASH and MASH programs to the ESA Program. Joint IOUs plan to file Advice Letter in Quarter 1 of 2023. After the Advice Letter is filed, budget authorization will be pending per Energy Division disposition of Advice Letter.

ESA Table 1B - Energy and Demand Savings Summary
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	Authorized / Forecasted Planning Assumptions			Actual			%		
ESA Program Savings:	kWh	kW	Therms	kWh	kW	Therms	kWh	kW	Therms
ESA Main Program (SF and MH) [1]	15,093,167	24,601,916	629,105	24,601,916	5,516	1,165,638	163%	193%	185%
ESA Multifamily In-Unit [2]	-	-	-	-	-	-	-	-	-
ESA Multifamily Common Area Measures	N/A	N/A	N/A	1,755,800	39	115,338	N/A	N/A	N/A
ESA Multifamily Whole Building [3]	-	-	-	-	-	-	-	-	-
ESA Pilot Plus and Pilot Deep [4]	-	-	-	-	-	-	-	-	0.00
Building Electrification Retrofit Pilot [5]	-	-	-	-	-	-	-	-	-
Clean Energy Homes New Construction Pilot [5]	-	-	-	-	-	-	-	-	-
CSD Leveraging	0	0	0	0	0	0	0%	0%	0%
ESA Program TOTAL	**15,093,167**	**24,601,916**	**629,105.00**	**26,357,716**	**5,555.02**	**1,280,975.60**	175%	0%	204%

[1] Energy and demand savings for PY 2022 includes ESA Main and Multifamily In-Unit.
[2] The ESA Multifamily In-Unit energy and demand savings are included in the ESA Main Program category.
[3] Implementation to occur no earlier than January 2023.
[4] D.21-06-015 did not specify kWh, kW or Therm targets for Pilot Plus/Deep. PG&E did not complete Pilot Plus/Deep projects in 2022.
[5] Pilots are applicable to SCE only.

ESA Table 1 - ESA Main Overall Program Expenses
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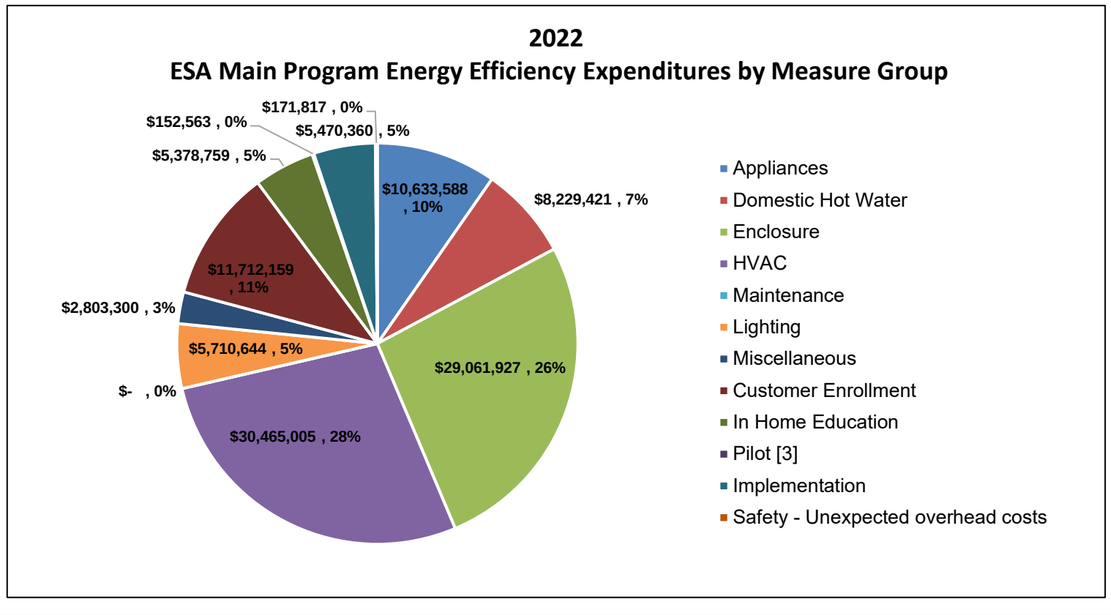
ESA Program:	2022 Authorized / Forecasted Budget [1] [2]			2022 Annual Expenses [2]			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency									
Appliances	$ 10,200,968	$ -	$ 10,200,968	$ 10,633,588	$ -	$ 10,633,588	104%	0%	104%
Domestic Hot Water	$ 1,111,675	$ 5,794,765	$ 6,906,440	$ 377,876	$ 7,851,544	$ 8,229,421	34%	135%	119%
Enclosure	$ 236,147	$ 23,378,299	$ 23,614,446	$ 290,619	$ 28,771,308	$ 29,061,927	123%	123%	123%
HVAC	$ 11,294,053	$ 6,498,976	$ 17,793,029	$ 4,618,669	$ 25,846,335	$ 30,465,005	41%	398%	171%
Maintenance	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Lighting	$ 5,542,434	$ -	$ 5,542,434	$ 5,710,644	$ -	$ 5,710,644	103%	0%	103%
Miscellaneous	$ 12,485,358	$ -	$ 12,485,358	$ 2,803,300	$ -	$ 2,803,300	22%	0%	22%
Customer Enrollment	$ 8,940,653	$ 7,928,503	$ 16,869,156	$ 6,207,444	$ 5,504,715	$ 11,712,159	69%	69%	69%
In Home Education	$ 2,657,489	$ 2,356,641	$ 5,014,130	$ 2,850,742	$ 2,528,017	$ 5,378,759	107%	107%	107%
Pilot [3]	$ 303,922	$ 269,516	$ 573,438	$ 80,858	$ 71,704	$ 152,563	0%	0%	0%
Implementation	$ 2,640,174	$ 2,341,287	$ 4,981,461	$ 2,899,291	$ 2,571,069	$ 5,470,360	0%	0%	0%
Safety - Unexpected overhead costs	$ -	$ -	$ -	$ 93,246	$ 78,572	$ 171,817	0%	0%	0%
Energy Efficiency TOTAL	**$ 55,412,873**	**$ 48,567,987**	**$ 103,980,860**	**$ 36,566,278**	**$ 73,223,264**	**$ 109,789,542**	**66%**	**151%**	**106%**
Administration									
Training Center	$ 301,343	$ 267,229	$ 568,572	$ 322,055	$ 285,596	$ 607,652	107%	107%	107%
Inspections	$ 1,538,944	$ 1,364,724	$ 2,903,668	$ 1,383,061	$ 1,226,488	$ 2,609,549	90%	90%	90%
Marketing and Outreach	$ 1,207,970	$ 1,071,218	$ 2,279,188	$ 1,312,389	$ 1,163,817	$ 2,476,207	109%	109%	109%
Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Measurement and Evaluation Studies [4]	$ 288,209	$ 194,101	$ 482,310	$ 62,283	$ 55,232	$ 117,516	22%	28%	24%
Regulatory Compliance	$ 306,957	$ 272,208	$ 579,165	$ 300,462	$ 266,447	$ 566,910	98%	98%	98%
General Administration	$ 4,100,056	$ 3,635,899	$ 7,735,955	$ 3,686,666	$ 3,256,989	$ 6,943,655	90%	90%	90%
CPUC Energy Division	$ 32,798	$ 29,085	$ 61,883	$ 26,988	$ 23,933	$ 50,921	82%	82%	82%
Administration Subtotal	**$ 7,776,277**	**$ 6,834,464**	**$ 14,610,741**	**$ 7,093,906**	**$ 6,278,503**	**$ 13,372,409**	**91%**	**92%**	**92%**
TOTAL PROGRAM COSTS	**$ 63,189,150**	**$ 55,402,451**	**$ 118,591,601**	**$ 43,660,184**	**$ 79,501,767**	**$ 123,161,951**	**69%**	**143%**	**104%**
Funded Outside of ESA Program Budget									
Indirect Costs				-	-	$ -			
NGAT Costs					$ 5,320,176	$ 5,320,176			

[1] Budget authorized in D.21-06-015, Attachment 1, Table 8.
[2] 2022 authorized budget and expenditures includes Benefit Burdens as approved in GRC (D.)20-12-005.
[3] Reflects carry forward VEC Pilot budget from 2021 to 2022 E $131,672 / G $116,766 total $248,438.
[4] Reflects carry forward Studies budget from 2021 to 2022 E $168,959 / G $88,351 total $257,310.



ESA Table 1A - Program Expenses Summary
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ESA Table 1A - Multifamily Whole Building Expenses

ESA Program (MFWB):	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Multifamily In-Unit [1]	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
ESA Multifamily Common Area Measures [2]	$ 30,413,070	$ 17,347,343	$ 47,760,413	$ 2,376,762	$ 3,933,141	$ 6,309,903	8%	23%	13%
ESA Multifamily Whole Building [3]	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
SPOC [4]	$ 418,485	$ 188,250	$ 606,735	$ 131,538	$ 116,647	$ 248,185	31%	62%	41%
TOTAL	**$ 30,831,555**	**$ 17,535,593**	**$ 48,367,148**	**$ 2,508,300**	**$ 4,049,788**	**$ 6,558,088**	**8%**	**23%**	**14%**

[1] Budget is included in ESA Main Program.
[2] Reflects CAM budget carried forward from 2021 to 2022 CAM Electric $18,077,670/ Gas $6,408,404 total of $24,486,074.
[3] Implementation to occur no earlier than January 2023.
[4] Reflects SPOC budget carried forward from 2021 to 2022 Electric $306,643/ Gas $89,069 total of $395,712.

ESA Table 1A-1 - Pilot Plus and Pilot Deep Expenses

	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Pilot Plus and Pilot Deep Program [1]	$ 4,637,129	$ 4,112,170	$ 8,749,299	$ 481,113	$ 426,647	$ 907,761	10%	10%	10%
TOTAL	**$ 4,637,129**	**$ 4,112,170**	**$ 8,749,299**	**$ 481,113**	**$ 426,647**	**$ 907,761**	**10%**	**10%**	**10%**

[1] Authorized budget adjusted to reflect carry backward budget from 2022 to 2021 of $33,308.

ESA Table 1A-2 - Building Electrification Expenses [1]

	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Building Electrification Program	$ -	$ -	$ -	$ -	$ -	$ -			
TOTAL	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**0%**	**0%**	**0%**

[1] This Pilot applicable to SCE only.

ESA Table 1A-3 - Clean Energy Homes Expenses [1]

	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Clean Energy Homes Program	$ -	$ -	$ -	$ -	$ -	$ -			
TOTAL	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**0%**	**0%**	**0%**

[1] This Pilot is applicable to SCE only.

ESA Table 1A-4 - Leveraging - CSD Expenses

	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Program Leveraging - CSD [1]	$ 2,503,978	$ 1,467,786	$ 3,971,764	$ 815	$ 723	$ 1,538	0%	0%	0%
MCE Pilot	$ 689,000	$ 611,000	$ 1,300,000	$ 1,378,000	$ 1,222,000	$ 2,600,000	200%	200%	200%
TOTAL	**$ 3,192,978**	**$ 2,078,786**	**$ 5,271,764**	**$ 1,378,815**	**$ 1,222,723**	**$ 2,601,538**	**43%**	**59%**	**49%**

[1] Reflects CSD budget carried forward from 2021 to 2022 CSD LIWP Electric $1,918,299/ Gas $948,410 total of $2,866,709.

ESA Table 2 - ESA Main Expenses and Energy Savings by Measures Installed (SF, MH, MF In-Unit)
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Measures	Basic	Plus	Units	ESA Main Program Totals 2022 Completed & Expensed Installation: Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses ($)	% of Expenditures
Appliances									
High Efficiency Clothes Washer	-	√	Each	2,289	423,465	76	44,027	$ 2,029,323	2.1%
Refrigerator	-	√	Each	7,869	4,366,162	611		$ 8,452,057	8.7%
New - Clothes Dryer	-	√	Each	-	-	-	-	$ -	0.0%
New - Dishwasher	-	N/A	Each	-	-	-	-	$ -	0.0%
Freezers	-	N/A	Home	-	-	-	-	$ -	0.0%
Domestic Hot Water									
Other Domestic Hot Water [5]	√	-	Home	51,498	293,185	41	260,231	$ 4,217,051	4.4%
Water Heater Tank and Pipe Insulation	-	√	Home	6,829	25,029	-	27,103	$ 549,776	0.6%
Water Heater Repair/Replacement	-	√	Home	1,423	-	-	11,121	$ 2,824,716	2.9%
Low-Flow Showerhead / Combined Showerhead/TSV	√	-	Home	-	-	-	-	$ -	0.0%
Heat Pump Water Heater	-	√	Each	150	267,716	197	-	$ 616,582	0.6%
Thermostatic Tub Spout/Diverter	√	-	Each	304	7	-	571	$ 28,660	0.0%
Thermostatic Shower Valve	√	-	Each	-	-	-	-	$ -	0.0%
New - Solar Water Heating	-	N/A	Home	-	-	-	-	$ -	0.0%
Enclosure									
Air Sealing [1]	-	√	Home	44,303	2,037,938	186	177,212	$ 23,948,669	24.8%
Caulking	-	√	Home	-	-	-	-	$ -	0.0%
New - Diagnostic Air Sealing	-	√	Home	-	-	-	-	$ -	0.0%
Attic Insulation	-	√	Home	1,707	20,191	4	75,501	$ 3,203,943	3.3%
New - Floor Insulation	-	√	Home	-	-	-	-	$ -	0.0%
HVAC									
FAU Standing Pilot Conversion	-	N/A	Home	-	-	-	-	$ -	0.0%
Furnace Repair/Replacement [6]	-	√	Each	1,729	-	-	(42,218)	$ 6,434,934	6.7%
Room A/C Replacement	-	√	Each	305	(57,470)	(10)	-	$ 234,362	0.2%
Central A/C replacement	-	√	Each	6	2,359	0.42	-	$ 17,638	0.0%
Heat Pump Replacement	-	√	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Replacement)	-	√	Each	351	138,728	22	-	$ 233,411	0.2%
Evaporative Cooler (Installation)	-	N/A	Each	-	-	-	-	$ -	0.0%
Duct Test and Seal	-	√	Home	703	(940)	(0.12)	-	$ 299,942	0.3%
Energy Efficient Fan Control	-	N/A	Home	-	-	-	-	$ -	0.0%
New - Prescriptive Duct Sealing	-	√	Home	23,425	3,659,688	2,647	258,378	$ 14,995,865	15.5%
High Efficiency Forced Air Unit (HE FAU)	-	√	Home	-	-	-	-	$ -	0.0%
A/C Time Delay	-	√	Home	29	6,359	4	-	$ 7,464	0.0%
Smart Thermostat	-	√	Home	13,780	2,883,599	519	388,694	$ 3,402,049	3.5%
New - Portable A/C	-	√	Each	74	-	-	-	$ 42,199	0.0%
New - Central Heat Pump-FS (propane or gas space)	-	N/A	Home	-	-	-	-	$ -	0.0%
New - Wholehouse Fan	-	√	Each	2	367	1	(2)	$ 2,709	0.0%
Blower Motor Retrofit	-	N/A	Each	-	-	-	-	$ -	0.0%
Maintenance									
Furnace Clean and Tune	-	N/A	Home	-	-	-	-	$ -	0.0%
Central A/C Tune up	-	√	Home	5,721	779,379	881	(95)	$ 2,252,273	2.3%
New - Evaporative Cooler Maintenance	-	N/A	Home	-	-	-	-	$ -	0.0%
Lighting									
Interior Hard wired LED fixtures	-	√	Each	11,113	760,190	91	(17,097)	$ 564,842	0.6%
Exterior Hard wired LED fixtures	-	√	Each	50,196	258,158	-	-	$ 2,803,682	2.9%
LED Torchiere	√	-	Each	605	42,648	5	(971)	$ 38,937	0.0%
Occupancy Sensor	-	√	Each	11	320	1	-	$ 704	0.0%
LED Night Light	N/A	-	Each	-	-	-	-	$ -	0.0%
LED Reflector Bulbs	√	-	Each	52,585	597,418	14	(12,515)	$ 445,864	0.5%
LED A-Lamps	√	-	Each	189,572	1,820,460	45	(4,303)	$ 1,583,113	1.6%
Miscellaneous									
Pool Pumps	-	√	Each	5	5,465	1	-	$ 8,613	0.0%
Power Strip	√	-	Each	18	-	-	-	$ 5,114	0.0%
Power Strip Tier II	√	-	Each	36,694	6,271,496	180	-	$ 2,577,308	2.7%
NEW - Air Purifier	-	√	Home	120	-	-	-	$ 29,429	0.0%
Cold Storage	-	√	Each	51	-	-	-	$ 16,305	0.0%
New - Comprehensive Home Health and Safety Check-up	-	N/A	Home	-	-	-	-	$ -	0.0%
New - CO and Smoke Alarm	-	√	Each	-	-	-	-	$ -	0.0%
Pilots									
-	-	-	-	-	-	-	-	-	-
Customer Enrollment									
ESA Outreach & Assessment	√	√	Home	67,567	-	-	-	$ 10,279,730	10.6%
ESA In-Home Energy Education	√	√	Home	67,567	-	-	-	$ 4,569,319	4.7%
Total Savings/Expenditures	-	-			**24,601,916**	**5,516**	**1,165,638**	**$ 96,716,583**	**100%**
Total Households Weatherized [2]	-	-		**57,099**					

Households Treated			
- Single Family Households Treated		Home	52,566
- Multi-family Households Treated		Home	9,454
- Mobile Homes Treated		Home	5,547
Total Number of Households Treated		**Home**	**67,567**
# Eligible Households to be Treated for PY [3]		Home	59,340
% of Households Treated		%	114%
- Master-Meter Households Treated		Home	3,073

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.
[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.
[3] Based on D.21-06-015 Attachment 1, Table 6 targets.
[4] Savings estimates are sourced from the most recent ESA Impact Evaluation; measures not included in the Impact Evaluation utilize values from workpapers.
[5] Other Domestic Hot Water includes the following parts: Faucet Aerator, Low Flow Showerhead, and Thermostatic shower valve.
[6] Furnace Repair/Replacement contains some high-efficiency forced-air unit measures that will be reported separately starting in 2023.

ESA Program - Main	Year to Date Expenses: Electric	Gas	Total	
Administration [7]	$ 7,093,906	$ 6,278,503	$ 13,372,409	
Direct Implementation (Non-Incentive) [8]	$ 2,899,291	$ 2,571,069	$ 5,470,360	
Direct Implementation [9]	$ 33,666,987	$ 70,652,195	$ 104,319,182	*<<Includes measures costs*
TOTAL ESA Main COSTS	**$ 43,660,184**	**$ 79,501,767**	**$ 123,161,951**	

[7] Administrative includes expenses from Training Center, Inspections, Marketing and Outreach, Studies, Regulatory Compliance, General Administrative, and CPUC Energy Division categories.
[8] Direct Implementation (Non-Incentive) includes expenses from Implementation category.
[9] Direct Implementation includes expenses from Appliances, Domestic Hot Water, Enclosure, HVAC, Lighting, Miscellaneous, Customer Enrollment, In-Home Education, Safety Unexpected Overhead Costs, and VEC Pilot.

ESA Table 2A - Multifamily Common Area Measures Initiative Expenses and Energy Savings by Measures Installed
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ESA Multifamily Common Area Measures Program Totals [1]

ESA MF CAM Measures	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses ($)	% of Expenditure
Appliances								
High Efficiency Clothes Washer	Each	0	0	0	0	0	$ -	0.0%
Refrigerator	Each	7	-	370.63	0.06	(10.18)	$ 8,451.31	0.2%
Domestic Hot Water								
Non-Condensing Domestic Hot Water Boiler	Cap-kBtuh	0	0	-	-	-	$ -	0.0%
Condensing Domestic Hot Water Boiler	Cap-kBtuh	27	14449	-	-	48,707.58	$ 1,138,722.51	22.5%
Storage Water Heater	Cap-kBtuh	103	16503.48	-	-	66,352.78	$ 1,420,123.14	28.1%
Tankless Water Heater	Cap-kBtuh	30	6885	(83.85)	-	12,226.68	$ 248,179.36	4.9%
Heat Pump Water Heater	kW	0	0	-	-	-	$ -	0.0%
Demand Control DHW Recirculation Pump	Each	87	-	22,332.83	2.575	507.73	$ 191,961.57	3.8%
Low flow Showerhead	Each	13	-	-	-	92.74	$ 107.51	0.0%
Faucet Aerator	Each	0	-	-	-	-	$ -	0.0%
Envelope								
Attic Insulation	Sq Ft	7491	-	464.46	0.42	26.62	$ 10,920.95	0.2%
Wall Insulation Blow-in	Sq Ft	0	-	-	-	-	$ -	0.0%
Windows	Sq Ft	1600.21	-	4,540.21	4.71	26.14	$ 138,607.39	2.7%
Window Film	Sq Ft	0	-	-	-	-	$ -	0.0%
HVAC								
Air Conditioners Split System	Cap-Tons	23	91.8	6,017.46	7.65	(118.03)	$ 282,970.23	5.6%
Heat Pump Split System	Cap-Tons	10	35	4,365.00	3.24	-	$ 100,027.04	2.0%
Packaged Air Conditioner	Cap-Tons	9	26.5	10,907.00	5.63	264.45	$ 89,944.10	1.8%
Package Terminal A/C	Cap-Tons	0	0	-	-	-	$ -	0.0%
Package Terminal Heat Pump	Cap-Tons	0	0	-	-	-	$ -	0.0%
Furnace Replacement	Cap-kBtuh	28	2336	1,157.82	1.01	1,120.80	$ 218,064.25	4.3%
Space Heating Boiler	Cap-kBtuh	16	3300	(4,896.00)	(0.48)	1,361.10	$ 232,654.51	4.6%
Smart Thermostat	Each	48	-	3,841.10	-	310.87	$ 12,493.86	0.2%
Lighting								
Interior LED Lighting	Each	1433	-	190666.28	1.584	(2,381.40)	$ 142,793.10	2.8%
Interior TLED Type A Lamps	Each	N/A	N/A	N/A	N/A	N/A	N/A	0.0%
Interior TLED Type C Lamps	Each	N/A	N/A	N/A	N/A	N/A	N/A	0.0%
LED T8 Lamp - Interior	Each	1272	-	284,264.64	3.18	(4,917.84)	$ 88,810.11	1.8%
LED T8 Lamp - Exterior	Each	250	-	29,805.00	0.65	-	$ 14,542.96	0.3%
Interior LED Fixture	Each	1429	-	508,098.29	4.25	(6,507.41)	$ 314,458.51	6.2%
Interior LED Screw-in	Each	838	-	115,679.04	0.82	(1,263.13)	$ 18,432.76	0.4%
Interior LED Exit Sign	Each	107	-	22,027.02	3.00	(381.03)	$ -	0.0%
Exterior LED Lighting	Each	24	-	6,327.12	-	-	$ 1,970.36	0.0%
LED Parking Garage Fixtures	Each	0	-	-	-	-	$ -	0.0%
LED Exterior Wall or Pole Mounted Fixture	Each	969	-	522,906.42	-	-	$ 366,159.69	7.2%
LED Corn Lamp for Exterior Wall or Pole Mounted	Each	41	-	22,136.82	-	-	$ 8,679.59	0.2%
Exterior LED Lighting - Pool	Each	N/A	-	-	-	-	$ -	0.0%
Wall or Ceiling Mounted Occupancy Sensor	Each	103	-	4,983.18	0.37	(86.23)	$ 11,247.80	0.2%
Miscellaneous								
Tier-2 Smart Power Strip	Each	2	-	260.00	0.04	(4.50)	$ 226.80	0.0%
Variable Speed Pool Pump	Each	0	-	-	-	-	$ -	0.0%
Ancillary Services								
Audit [4]	-	0	-	0	0	0	$ -	0.0%
Total		**15,953**	**43,627**	**1,755,800**	**39**	**115,338**	**$ 5,052,098**	

[1] Measures are customized by each IOU. Measures list may change based on available information on both costs and benefits and may vary across climate zones. Each IOU should fill out Table 2B as it pertains to their program.

[4] Audit costs may be covered by other programs or projects may utilize previous audits. Not all participants will have an audit cost associated with their project.

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated [2]	45
Subtotal of Master-metered Multifamily Properties Treated	7
Total Number of Multifamily Tenant Units w/in Properties Treated [3]	4298
Total Number of buildings w/in Properties Treated	**520**

[2] Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings.

[3] Multifamily tenant units are the number of dwelling units located within properties treated. This number does not represent the same number of dwellings treated as captured in Table 2 nor 2A.

	Year to Date Expenses		
ESA Program - MF CAM [5]	**Electric**	**Gas**	**Total**
Administration	$ 478,960	$ 424,738	$ 903,699
Direct Implementation (Non-Incentive)	$ 842,480	$ 747,105	$ 1,589,585
Direct Implementation [7]	$ 1,055,322	$ 2,761,298	$ 3,816,620
TOTAL MF CAM COSTS [6]	**$ 2,376,762**	**$ 3,933,141**	**$ 6,309,903**

<<Includes measures costs

[5] Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022, modified by D.17-12-009, where 65% of tenants are income eligible based (at or below 200% of the Federal Poverty Guidelines).

[6] Commissioning costs, as allowable per the Decision, are included in measures total cost unless otherwise noted.

[7] Direct implementation expenses include measures costs and accruals for 2022.

Notes:

*Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

**Implementation of the MF CAM Initiative AL 3196-E-A_2654-G-A was approved effective 5/30/2018.

ESA Table 2B - Multifamily Whole Building Expenses and Energy Savings by Measures Installed
Pacific Gas and Electric Company
Program Year 2022 Annual Report

ESA Multifamily Whole Building Program Totals

ESA MFWB Measures	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses ($)	% of Expenditure
Appliances								
-	-	-	-	-	-	-	-	-
Domestic Hot Water								
Central Boiler	Cap-kBTUh	-	-	-	-	-	$ -	-
Faucet Aerator	Each	-	-	-	-	-	$ -	-
Pipe Insulation	Home	-	-	-	-	-	$ -	-
Envelope								
-	-	-	-	-	-	-	-	-
HVAC								
AC Tune-up	Cap-Tons	-	-	-	-	-	$ -	-
Furnace Replacement	Cap-kBTUh	-	-	-	-	-	$ -	-
HEAT Pump Split System	Cap-Tons	-	-	-	-	-	$ -	-
HEAT Pump Split System	Each	-	-	-	-	-	$ -	-
Programmable Thermostat	Each	-	-	-	-	-	$ -	-
Lighting								
Exterior LED Lighting	Fixture	-	-	-	-	-	$ -	-
Exterior LED Lighting - Pool	Lamp	-	-	-	-	-	$ -	-
Interior LED Exit Sign	Fixture	-	-	-	-	-	$ -	-
Interior LED Fixture	Fixture	-	-	-	-	-	$ -	-
Interior LED Lighting	KiloLumen	-	-	-	-	-	$ -	-
Interior LED Screw-in	Lamp	-	-	-	-	-	$ -	-
Interior TLED Type A Lamps	Lamp	-	-	-	-	-	$ -	-
Interior TLED Type C Lamps	Lamp	-	-	-	-	-	$ -	-
Miscellaneous								
Tier-2 Smart Power Strip	Each	-	-	-	-	-	$ -	-
Variable Speed Pool Pump	Each	-	-	-	-	-	$ -	-
Ancillary Services								
Audit	-	-	-	-	-	-	$ -	-
Total	-	-	-	-	-	-	$ -	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated	0
Subtotal of Master-metered Multifamily Properties Treated	0
Total Number of Multifamily Tenant Units w/in Properties Treated	0
Total Number of buildings w/in Properties Treated	0

ESA Program - MFWB	Year to Date Expenses		
	Electric	Gas	Total
Administration			$ -
Direct Implementation (Non-Incentive)			$ -
Direct Implementation			$ -
TOTAL MFWB COSTS	$ -	$ -	$ -

<<Includes measures costs

Note:
* MFWB implementation to occur no earlier than January 2023.

ESA Table 2C - Pilot Plus and Pilot Deep Expenses and Energy Savings by Measures Installed
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Measures	ESA Program - Pilot Plus							ESA Program - Pilot Deep						
		2022 Completed & Expensed Installation [1]							2022 Completed & Expensed Installation [1]					
	Units (Each or Home)	Quantity Installed	kWh [2] (Annual)	kW [2] (Annual)	Therms [2] (Annual)	Expenses ($) [3]	% of Expenditures	Units (Each or Home)	Quantity Installed	kWh [2] (Annual)	kW [2] (Annual)	Therms [2] (Annual)	Expenses ($) [3]	% of Expenditures
Appliances														
High Efficiency Clothes Washer	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Refrigerator	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Microwave	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - Freezer	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Domestic Hot Water														
Other Domestic Hot Water	Home	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Water Heater Tank and Pipe Insulation	Home	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Water Heater Repair/Replacement	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Combined Showerhead/TSV	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - Tub Diverter/ Tub Spout	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Enclosure														
Air Sealing	Home	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Caulking	Home	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
HVAC														
FAU Standing Pilot Conversion	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Furnace Repair/Replacement	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Room A/C Replacement	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Central A/C replacement	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Duct Test and Seal	Home	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%		-	-	-	-	$ -	0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - A/C Time Delay	Home	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - Smart Thermostat	Home	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Maintenance														
Furnace Clean and Tune	Home	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Lighting														
Interior Hard wired LED fixtures	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Exterior Hard wired LED fixtures	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
LED Torchiere	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Occupancy Sensor	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
LED Night Light	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - LED R/BR Lamps	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - LED A-Lamps	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Miscellaneous														
Pool Pumps	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Smart Strip	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Smart Strip Tier II	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Pilots														
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Customer Enrollment														
ESA Outreach & Assessment	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
ESA In-Home Energy Education	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
Total Savings/Expenditures		**-**	**-**	**-**	**-**	**$ -**	**0.0%**		**-**	**-**	**-**	**-**	**$ -**	**0.0%**
Total Households Weatherized		**-**	**-**	**-**	**-**	**$ -**	**0.0%**		-	-	-	-	$ -	0.0%

[1] As of December 31, 2022, PG&E has begun installation, but has not fully completed a project. "Completed and Expensed Installation" project savings and expenses will be reported when projects have been fully closed (i.e. inspected, issues resolved, permits closed as applicable) and reported by Pilot Implementer to PG&E. All measures and savings from a project will be reported as either Pilot Plus or Pilot Deep. Savings from a single project will not span both tables.

[2] PG&E will report savings in monthly and annual reports based on the energy modeling software's estimate of savings. PG&E will additionally report the meter-based energy savings estimates from pilot treatments; however, such data requires 12 months of post-treatment monitoring and analysis.

[3] Final, disaggregated costs for measure installations will be reported in Table 2C once projects are fully completed and billed to PG&E by the Pilot Implementer.

Pilot Plus Households Treated	Total	
- Single Family Households Treated	Home	-
- Multi-family Households Treated	Home	-
- Mobile Homes Treated	Home	-
Total Number of Households Treated	**Home**	**-**
# Eligible Households to be Treated for PY [4]	Home	N/A
% of Households Treated	%	0%
- Master-Meter Households Treated	Home	-

Pilot Deep Households Treated	Total	
- Single Family Households Treated	Home	-
- Multi-family Households Treated	Home	-
- Mobile Homes Treated	Home	-
Total Number of Households Treated	**Home**	**-**
# Eligible Households to be Treated for PY [4]	Home	N/A
% of Households Treated	%	0%
- Master-Meter Households Treated	Home	-

[4] D.21-06-015 did not specify annual home treatment or savings targets for Pilot Plus/Deep.

ESA Program - Pilot Plus and Pilot Deep	Year to Date Expenses [5]		
	Electric	Gas	Total
Administration [6]	$ 173,123	$ 153,524	$ 326,647
Direct Implementation (Non-Incentive) [7]	$ 300,040	$ 266,073	$ 566,114
Direct Implementation [8]	$ 7,950	$ 7,050	$ 15,000
TOTAL Pilot Plus and Pilot Deep COSTS	**$ 481,113**	**$ 426,647**	**$ 907,761**

<<Includes measures costs

[5] Total ESA Pilot Plus and Pilot Deep YTD expenses may contain a combination of expenses and acrrued expenses as reported in ESA Table 1A.

[6] Administration includes expenses from the following categories: General Administration, Regulatory Compliance, Training, Inspections, Marketing and Outreach, and Evaluation.

[7] Direct Implementation (Non-Incentive) includes expenses for Implementer Administration and Marketing.

[8] Direct Implementation includes expenses for measures delivery.

ESA Table 2D - Building Electrification Expenses and Energy Savings by Measures Installed (SCE Only)
Pacific Gas and Electric Company
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Measures	Units	ESA Program - Building Electrification Retrofit Pilot [1]					
		2022 Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses ($)	% of Expenditure
Appliances							
Electric Dryer	Each	-	-	-	-	$ -	-
Heat Pump Dryer	Each	-	-	-	-	$ -	-
Induction Cooktop	Each	-	-	-	-	$ -	-
Induction Range	Each	-	-	-	-	$ -	-
Domestic Hot Water							
Heat Pump Water Heater	Each	-	-	-	-	$ -	-
Enclosure							
Attic Insulation	Home	-	-	-	-	$ -	-
HVAC							
Heat Pump HVAC	Each	-	-	-	-	$ -	-
Duct Seal	Each	-	-	-	-	$ -	-
Smart Thermostat	Each	-	-	-	-	$ -	-
Miscellaneous [2]							
Minor Home Repair	Home	-	-	-	-	$ -	-
Carbon Monoxide/Smoke Alarm	Each	-	-	-	-	$ -	-
Electric Panel	Each	-	-	-	-	$ -	-
Electric Sub-Panel	Each	-	-	-	-	$ -	-
Electrical Circuit Run	Each	-	-	-	-	$ -	-
Induction Cookware	Home	-	-	-	-	$ -	-
Customer Enrollment							
Energy Assessment	Home	-	-	-	-	$ -	-
Total Savings/Expenditures		-	-	-	-	$ -	-

[1] The costs for the following measures are included in the overall expenditures of the BE Pilot: additional line set for ductless mini-splits and building permits.
[2] These measures do not have any savings associated and may be required to complete the installation to electrify the residential end-uses of participating households.

Households Treated		Total
Single Family Households Treated	Home	-
Estimated Avg. Annual Bill SavingsTreated [3]	Home	-

ESA Program - Building Electrification	Year to Date Expenses			
	Electric	Gas	Total	
Administration	-	-	$ -	
Direct Implementation (Non-Incentive)	-	-	$ -	
Direct Implementation	-	-	$ -	*<<Includes measures costs*
TOTAL Building Electrification COSTS	$ -	$ -	$ -	

[3] Estimated average annual bill savings will be calculated prior to participation and must not increase total energy costs.

ESA Table 2E - Clean Energy Homes Expenses and Energy Savings by Measures Installed (SCE Only)
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Measures	Units	ESA Program - Clean Energy Homes New Construction Pilot 2022 Completed & Expensed Installation Quantity	Avoided (CO_2e) emissions	Incentives Paid ($)	% of Expenditure
Education and Outreach					
Direct Outreach (Developers and Owners)	Each	-	N/A	$ -	0.0%
Educational Webinars	Each	-	N/A	$ -	0.0%
Technical Design Assistance (Reserved)					
Single-Family Homes	Each	-	-	$ -	0.0%
Multifamily Properties	Each	-	-	$ -	0.0%
• Buildings	Each	-	-	$ -	0.0%
• No. of Dwelling Units	Each	-	-	$ -	0.0%
Technical Design Assistance (In Process)					
Single-Family Homes	Home	-	-	$ -	0.0%
Multifamily Properties	Each	-	-	$ -	0.0%
• Buildings	Each	-	-	$ -	0.0%
• No. of Dwelling Units	Each	-	-	$ -	0.0%
Technical Design Assistance (Completed)					
Single-Family Homes	Each	-	-	$ -	0.0%
Multifamily Properties	Each	-	-	$ -	0.0%
• Buildings	Each	-	-	$ -	0.0%
• No. of Dwelling Units		-	-	$ -	0.0%
	Home	-		$ -	0.0%
Total Savings/Expenditures		**-**	**-**	**$ -**	**0.0%**

Households Treated		Total
- Single Family Households Treated	Home	-
- Multifamily Dwelling Units Treated	Home	-
Total Number of Households Treated	**Home**	**-**

ESA Program - Clean Energy Homes	Year to Date Expenses Electric	Gas	Total	
Administration	$ -	$ -	$ -	
Direct Implementation (Non-Incentive)	$ -	$ -	$ -	
Direct Implementation	$ -	$ -	$ -	*<<Includes measures costs*
TOTAL Clean Energy Homes COSTS	$ -	$ -	$ -	

ESA Table 2F - CSD Leveraging Expenses and Energy Savings by Measures Installed
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Measures	Units	ESA Program - CSD Leveraging: Year-To-Date Completed & Expensed Installation — Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses ($)	% of Expenditure
Appliances							
High Efficiency Clothes Washer	Each	-	-	-	-	$ -	0.0%
Refrigerators	Each	-	-	-	-	$ -	0.0%
Microwaves	Each	-	-	-	-	$ -	0.0%
New - Freezer	Each	-	-	-	-	$ -	0.0%
Domestic Hot Water							
Water Heater Blanket	Home	-	-	-	-	$ -	0.0%
Low Flow Shower Head	Home	-	-	-	-	$ -	0.0%
Water Heater Pipe Insulation	Home	-	-	-	-	$ -	0.0%
Faucet Aerator	Home	-	-	-	-	$ -	0.0%
Water Heater Repair/Replacement	Each	-	-	-	-	$ -	0.0%
Thermostatic Shower Valve	Each	-	-	-	-	$ -	0.0%
New - Combined Showerhead/TSV	Each	-	-	-	-	$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%
New - Tub Diverter/ Tub Spout	Each	-	-	-	-	$ -	0.0%
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%
Enclosure							
Air Sealing / Envelope	Home	-	-	-	-	$ -	0.0%
Caulking	Home	-	-	-	-	$ -	0.0%
Attic Insulation	Home	-	-	-	-	$ -	0.0%
HVAC							
FAU Standing Pilot Conversion	Each	-	-	-	-	$ -	0.0%
Furnace Repair/Replacement	Each	-	-	-	-	$ -	0.0%
Room A/C Replacement	Each	-	-	-	-	$ -	0.0%
Central A/C replacement	Each	-	-	-	-	$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	$ -	0.0%
Duct Testing and Sealing	Home	-	-	-	-	$ -	0.0%
New - Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%
New - Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	0.0%
New - A/C Time Delay	Home	-	-	-	-	$ -	0.0%
Maintenance							
Furnace Clean and Tune	Home	-	-	-	-	$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	$ -	0.0%
Lighting							
Compact Fluorescent Lights (CFL)	Each	-	-	-	-	$ -	0.0%
Interior Hard wired CFL fixtures	Each	-	-	-	-	$ -	0.0%
Exterior Hard wired CFL fixtures	Each	-	-	-	-	$ -	0.0%
Torchiere	Each	-	-	-	-	$ -	0.0%
Occupancy Sensor	Each	-	-	-	-	$ -	0.0%
LED Night Lights	Each	-	-	-	-	$ -	0.0%
New - LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	$ -	0.0%
New - LED Reflector Bulb	Each	-	-	-	-	$ -	0.0%
New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	$ -	0.0%
New - LED A-Lamps	Each	-	-	-	-	$ -	0.0%
Miscellaneous							
Pool Pumps	Each	-	-	-	-	$ -	0.0%
Smart Power Strips - Tier 1	Each	-	-	-	-	$ -	0.0%
New - Smart Power Strips - Tier 2	Each	-	-	-	-	$ -	0.0%
Pilots							
-	-	-	-	-	-	-	-
Customer Enrollment							
Outreach & Assessment	Home	-				$ -	0.0%
In-Home Education	Home	-				$ -	0.0%
Total Savings/Expenditures		-	-	-	-	$ -	0.0%
Total Households Weatherized		-	-	-	-	-	-

CSD MF Buildings Treated			Total
- Multifamily			0

ESA Program - CSD Leveraging			Electric	Gas	Total	
Administration [1]			$ 815	$ 723	$ 1,538	
Direct Implementation (Non-Incentive) [2]			$ -	$ -	$ -	
Direct Implementation [3]			$ -	$ -	$ -	*<<Includes measures costs*
TOTAL CSD Leveraging COSTS			$ 815	$ 723	$ 1,538	

[1] Administration includes administration labor expenses.
[2] Direct Implementation (Non-Incentive) includes Implementer expenses.
[3] Direct Implementation includes expenses for installation of measures.

	A	B	C	D	E	F	G	H	I
1	**ESA Table 3 - Program Cost Effectiveness** **Pacific Gas and Electric Company** **Program Year 2022 Annual Report**								
2									
3									
4									
5	**Program**	**Ratio of Benefits Over Costs**					**Net Benefits $**		
6		**ESACET [2]**	**Resource Test**	**TRC**	**PAC**	**RIM**	**ESACET**	**Resource Test**	**TRC**
7	**ESA In-Unit (SF, MH, MF-In-Unit)**	**0.69**	**0.58**	**0.34**	**0.34**	**0.25**	**(36.50)**	**(29.34)**	**(77.91)**
8	**ESA MF CAM**	-	-	**0.52**	**0.52**	**0.38**	-	-	**(2.87)**
9	**ESA MFWB (MF In-Unit, MF CAM, MFWB)**	-	-	-	-	-	-	-	-
10	**ESA Pilot Plus and Pilot Deep [1]**	-	-	-	-	-	-	-	-
11	**Building Electrification**	-	-	-	-	-	-	-	-
12	**Clean Energy Homes**	-	-	-	-	-	-	-	-
13	[1] PG&E did not complete Pilot Plus/Deep projects in 2022. There are no savings to analyze for cost-effectiveness.								
14	[2] PG&E used the CET 2024 Avoided Cost Calculator, as required by D.16-06-007 for cost-effectiveness analysis.								
15									
16	**Notes:**								
17	*All program measures, including resource and non-resource measures, are represented in the ESACET. Only measures considered resource measures are represented in the Resource Test. Resource measures, as defined by the ESA Cost Effectiveness Working Group, include any measure with a unit savings of less than one kWh or one therm.								
18	*The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs.								
19	*The Resource Test includes energy benefits and program measure and installation costs.								
20	*ESA CAM savings estimates are based on approved workpapers.								
21	*Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC (renamed the Resource Test).								
22	*MFWB implementation to occur no earlier than January 2023.								

ESA Table 4 - Detail by Housing Type and Source [1]
Pacific Gas and Electric Company
Program Year 2022 Annual Report

	Customer	Housing Type	2022 Energy Savings [2] # Homes /Properties Treated	(mWh)	MW	(mTherm)	2022 Expenses
7	**Gas and Electric Customers**						
8	**Owners - Total**		**31,239**	**13.50**	**3.45**	**718.69**	**$ 50,606,599**
9		**Single Family**	27,313	12.20	3.06	658.51	$ 45,461,286
10		**Multi Family**	158	0.05	0.01	2.31	$ 168,341
11		**Mobile Homes**	3,768	1.25	0.39	57.86	$ 4,976,971
12	**Renters - Total**		**23,925**	**7.08**	**1.17**	**340.14**	**$ 20,909,759**
13		**Single Family**	16,038	5.50	1.03	247.29	$ 15,230,637
14		**Multi Family**	7,673	1.50	0.12	89.47	$ 5,424,670
15		**Mobile Homes**	214	0.08	0.02	3.38	$ 254,452
16	**Electric Customers (only)**						
17	**Owners - Total**		**4,930**	**2.14**	**0.41**	**1.61**	**$ 2,965,262**
18		**Single Family**	4,255	1.91	0.39	1.36	$ 2,614,832
19		**Multi Family**	39	0.02	0.00	0.07	$ 34,913
20		**Mobile Homes**	636	0.21	0.02	0.18	$ 315,517
21	**Renters - Total**		**3,459**	**1.04**	**0.12**	**2.93**	**$ 1,974,386**
22		**Single Family**	1,880	0.65	0.08	0.15	$ 994,784
23		**Multi Family**	1,444	0.34	0.03	2.60	$ 896,727
24		**Mobile Homes**	135	0.05	0.01	0.17	$ 82,875
25	**Gas Customers (only)**						
26	**Owners - Total**		**3,228**	**0.71**	**0.31**	**84.96**	**$ 4,661,652**
27		**Single Family**	2,445	0.57	0.24	71.77	$ 3,715,531
28		**Multi Family**	6	0.00	0.00	0.07	$ 5,574
29		**Mobile Homes**	777	0.14	0.07	13.11	$ 940,547
30	**Renters - Total**		**786**	**0.12**	**0.05**	**17.31**	**$ 749,878**
31		**Single Family**	641	0.12	0.05	15.68	$ 681,532
32		**Multi Family**	136	0.01	0.00	1.47	$ 60,215
33		**Mobile Homes**	9	0.00	0.00	0.16	$ 8,131
34	**Gas and Electric Total - ESA MFWB**						
35	ESA Multifamily In-Unit [3]	-	-	-	-	-	-
36	ESA Multifamily Common Area Measures [4]	-	-	-	-	-	-
37	ESA Multifamily Whole Building [5]	-	-	-	-	-	-
38	**Totals:**		**67,567**	**24.60**	**5.52**	**1,165.64**	**$ 81,867,535**

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit). There are no Pilot Plus/Deep data to report because PG&E did not complete pilot projects in 2022.
[2] Savings estimates are sourced from the most recent ESA Impact Evaluation; measures not included in the Impact Evaluation utilize values from workpapers.
[3] Included in ESA Main Program reported in the above table lines 9-33
[4] MF CAM totals are included in Table 2A MF CAM
[5] Implementation to occur no earlier than January 2023.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible Households Treated by Both Utilities in Shared Service Territory
2022	SCE	5,415	0
2022	SoCalGas	93,411	2,499

	A	B	C	D	E	F	G
1	**ESA Table 5 - Direct Purchases & Installation Contractors [1]**						
2	**Pacific Gas and Electric Company**						
3	**Program Year 2022 Annual Report**						
4							
5	**Contractor**	**County**	**Contractor Type**				**2022 Annual Expenditures**
6			**Private**	**CBO**	**WMDVBE**	**LIHEAP**	
7	**Implementer 1**						
8	1	Alameda, Contra Costa, Marin, Napa, San Francisco, Alpine, Amador, Calaveras, Fresno, Kern, Kings, Madera, Mariposa, Merced, San Bernardino, San Joaquin, Stanislaus, Tulare, Tuolumne	X	-	-	-	$ 755,251.08
9	2	Fresno, Madera, Kings, Tulare, Kern	X	-	-	-	$ 1,722,908.35
10	3	San Francisco, San Mateo, Santa Clara, Alameda, Contra Costa, San Joaquin, Stanislaus, Merced, Solano	X	-	X	-	$ 766,352.72
11	4	Alameda, Contra Costa, San Francisco	X	-	-	-	$ 1,444,763.29
12	5	Merced, Madera, Tuolumne, Mariposa, Fresno	X	-	-	-	$ 759,751.12
13	6	Fresno, Madera, Kings, Tulare	X		X		$ 473,305.93
14	7	Alameda, Contra Costa, Napa, Yolo, Solano, Sacramento, San Joaquin		X			$ 2,626,682.45
15	8	Kern, Tulare, Kings, Fresno, Madera, Monterey, Stanislaus and San Joaquin	X	-	-	-	$ 212,669.97
16	9	Fresno, Madera, Merced, Stanislaus, San Joaquin, Kern, Tulare, Kings, Contra Costa, Alameda	X	-	-	-	$ 70,621.39
17	10	Contra Costa, San Francisco, San Mateo, Santa Clara		X		-	$ 211.53
18	11	Merced, Stanislaus, San Joaquin	X	-	X	-	$ 448,475.03
19	12	Fresno	X	-	X	-	$ 2,398,478.60
20	13	Kern	X	-	X	-	$ 822,555.77
21	14	Napa, San Francisco, Contra Costa, Alameda, Sonoma, Solano, Marin	X	-	-	-	$ 12,495,200.16
22	15	Kern, Kings, Madera	X		X		$ 67,020.07
23	16	Contra Costa, Napa	X	-	-	-	$ 690,976.81
24	17	Shasta, Tehama, Glenn Butte, Colusa, Calaveras, El Dorado, Humbolt, Mendocino, Placer, Plumas, Sacramento, Solano, Sonoma, Yolo, Yuba, Stanisluas	X	-	-	-	$ 81,387.84
25	18	Alpine, Amador, Calaveras, Kern, Contra Costa	X		X		$ 914,324.28
26	19	Fresno, Madera, Merced, San Luis Obispo, San Joaquin, Stanislaus	X	-	-	-	$ 429,067.26
27	20	Alameda, Contra Costa, San Francisco, Marin, San Joaquin, Stanislaus, Fresno, Merced	X		X		$ 5,314,023.62
28	21	Kern, Fresno, Calaveras, Kings, Madera, Mariposa, Merced, San Joaquin, Tulare, Tuolumne, Stanislaus	X	-	-	-	$ 719,632.52
29	22	Kern, Kings, Tulare, Fresno, Madera	X	-	-	-	$ 924,094.67
30	**Implementer 1 Contractor Expenditures**						**$ 34,137,754.46**
31							
32	**Contractor**	**County**	**Contractor Type**				**2022 Annual Expenditures**
33			**Private**	**CBO**	**WMDVBE**	**LIHEAP**	
34	**Implementer 2**						
35	1	Fresno, Kings, Madera	X	-	-	-	$ 373,790.45
36	2	San Luis Obispo, Santa Barbara			X		$ 957,580.00
37	3	Butte, Colusa, El Dorado, Fresno, Glenn, Kern, Mariposa, Nevada, Placer, Sacramento, San Joaquin, San Mateo, Santa Clara, Solano, Sonoma, Stanislaus, Sutter, Tehama, Tuolumne, Yolo, Yuba	X	-	-	-	$ 3,532,557.43
38	4	Fresno	X	-	-	-	$ 4,096,042.76
39	5	San Mateo, Santa Clara, Solano, Sonoma	X	-	-	-	$ 367,490.06
40	6	Santa Cruz, Santa Clara	X	-	-	-	$ 1,808,180.27
41	7	Tuolumne, Mariposa, Fresno, Madera, Merced	X	-	-	-	$ 4,345,694.20
42	8	Santa Cruz, Santa Barbara, Monterey, San Luis Obispo	-	X	-	X	$ 289,903.30
43	9	Humboldt, Kings, Tulare, Madera, Fresno	-	-	X	-	$ 4,348,717.50
44	10	Sacramento, Yolo, San Joaquin, Solano	-	X		-	$ 3,262,051.15
45	11	Kern	-	-	X	-	$ 904,925.46
46	12	Fresno	-	-	X	-	$ 7,250.31
47	13	Calaveras, Fresno, Kern, Kings, Madera, Merced, Sacramento, San Joaquin, Stanislaus, Tulare	X	-	-	-	$ 584,988.71
48	14	San Mateo, Santa Clara	-	X	-	-	$ 53,230.32
49	15	Merced, Sacramento, San Joaquin, Solano, Stanislaus, Yolo	-	-	X	-	$ 3,633,064.82
50	16	Fresno, Kern, Kings, Merced, San Joaquin, Stanislaus,	-	-	X	-	$ 6,890,981.36
51	17	Alpine, Amador, Butte, Calaveras, Colusa, El Dorado,	-	-	X	-	$ 1,866,138.84
52	18	Kern	-	-	X	-	$ 2,320,871.77
53	19	Fresno, Kern, Kings, Tulare	-	X	-	X	$ 215,368.33
54	20	Sonoma, Solano	X	-	-	-	$ 1,852,443.15
55	21	Fresno, Merced	X	-	-	-	$ 51,815.36
56	22	Kern, San Luis Obispo, Santa Barbara			X		$ 357,490.54
57	23	Butte, Colusa, Glenn, Lake, Mendocino, Nevada, Placer, Plumas, Sacramento, Shasta, Sierra, Sutter, Tehama, Yolo, Yuba	-	-	X	-	$ 777,260.56
58	24	Butte, Calaveras, Colusa, El Dorado, Fresno, Glenn, Humboldt, Mendocino, Placer, Plumas, San Joaquin, Shasta, Solano, Sonoma, Stanislaus, Sutter, Tehama, Yolo, Yuba	X	-	-	-	$ 3,743,238.28
59	25	Tehama, Shasta		X	-	X	$ 357,489.93
60	26	Santa Clara	X				$ 9,901.61
61	27	Amador, Calaveras, El Dorado, Kern, Monterey, Nevada, Placer, Sacramento, San Benito, Santa Cruz	X	-	-	-	$ 5,895,597.88
62	28	Fresno, Madera, Merced, San Joaquin, San Luis Obispo, Stanislaus	X	-	-	-	$ 1,494,637.76
63	29	Monterey, San Joaquin, San Mateo, Santa Clara, Solano		-	X	-	$ 2,315,513.94
64	30	Amador, Butte, Calaveras, Colusa, El Dorado, Fresno, Glenn, Humboldt, Kern, Kings, Lake, Madera, Mariposa, Merced, Monterey, Nevada, Placer, Sacramento, San Benito, San Joaquin, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Solano, Sonoma, Stanislaus, Sutter, Tehama, Tulare, Tuolumne, Yolo, Yuba	X	-	-	-	$ 4,841,362.93
65	31	Monterey, San Benito, San Luis Obispo, Santa Barbara, Santa Cruz	X	-	-	-	$ 1,279,530.12
66	32	Butte, El Dorado, Fresno, Glenn, Kern, Lake, Madera, Merced, Nevada, Placer, San Joaquin, Santa Clara, Solano, Stanislaus, Sutter, Tulare, Yolo, Yuba	X	-	-	-	$ 1,542,514.91
67	33	Fresno, Kern, Kings, Madera, Tulare	X	-	-	-	$ 3,060,841.19
68	**Implementer 1 Contractor Expenditures**						**$ 67,438,465.20**
69	**Total Contract Expenditure**						**$ 101,576,219.66**
70	[1] Annual Expenditures reflect invoices for projects paid in 2022 including NGAT work. Table 1 and 1A costs include labor and materials, accruals and cost corrections for 2022.						
71							
72	**Notes:**						
73	*Includes Direct Purchases & Installation Contractors for the ESA Main Program only.						
74	*PG&E did not complete projects nor issue payment for installations for ESA Pilot Plus and Pilot Deep in 2022. See ESA Table 7 for ESA Pilot Plus/Deep contract expenses, which include pilot implementator and non-installation subcontractors.						

ESA Table 6 - Installation Cost of Program Installation Contractors [1]
Pacific Gas and Electric Company
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		Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2022 Program Total				
			Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Installations	Costs	Cost/ Unit	Cost/ Household
			Units	%	Units	%	$	%	Units	%	Units	%	$	%					
8	Dwellings	Each	170,582	27%	-	0%	$ 5,600,228	7%	468,019	73%	-	0%	$ 76,267,307	93%	638,601	67,567	$ 81,867,534	$ 128.20	$ 1,211.65
9	**Appliances**																		
10	High Efficiency Clothes Washer	Each	7	0%	7	0%	$ 6,206	0%	2,282	100%	2,280	100%	$ 2,023,117	100%	2,287	2,287	$ 2,029,323	$ 887	$ 887
11	Refrigerator	Each	175	2%	175	2%	$ 187,967	2%	7,694	98%	7,694	98%	$ 8,264,090	98%	7,869	7,869	$ 8,452,057	$ 1,074	$ 1,074
12	Microwave	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
13	New - Freezer	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
14	**Domestic Hot Water**																		
15	Other Domestic Hot Water	Home	3,083	6%	3,083	6%	$ 252,460	6%	48,415	94%	48,415	94%	$ 3,964,591	94%	51,498	51,498	$ 4,217,051	$ 82	$ 82
16	Water Heater Repair/Replacement	Home	20	1%	20	1%	$ 39,701	1%	1,403	99%	1,403	99%	$ 2,785,015	99%	1,423	1,423	$ 2,824,716	$ 1,985	$ 1,985
17	Water Heater Tank and Pipe Insulation	Home	225	3%	225	3%	$ 18,114	3%	6,604	97%	6,604	97%	$ 531,662	97%	6,829	6,829	$ 549,776	$ 81	$ 81
18	New - Heat Pump Water Heater	Each	23	15%	22	15%	$ 94,543	15%	127	85%	127	85%	$ 522,039	85%	150	149	$ 616,582	$ 4,111	$ 4,138
19	New - Tub Diverter/ Tub Spout	Each	10	3%	7	3%	$ 943	3%	294	97%	230	97%	$ 27,717	97%	240	237	$ 28,660	$ 119	$ 121
20	New - Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
21	Combined Showerhead/TSV	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
22	CAM - Central Boiler	Cap-kBTUh	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
23	CAM - Faucet Aerator	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
24	CAM - Pipe Insulation	Home	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
25	**Enclosure**																		
26	Air Sealing	Home	3,535	8%	3,535	8%	$ 1,910,899	8%	40,768	92%	40,768	92%	$ 22,037,770	92%	44,303	44,303	$ 23,948,669	$ 541	$ 541
27	Attic Insulation	Home	269	16%	269	16%	$ 504,898	16%	1,438	84%	1,438	84%	$ 2,699,045	84%	1,707	1,707	$ 3,203,943	$ 1,877	$ 1,877
28	**HVAC**																		
29	FAU Standing Pilot Conversion	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
30	Furnace Repair/Replacement	Each	28	2%	28	2%	$ 104,209	2%	1,701	98%	1,701	98%	$ 6,330,725	98%	1,729	1,729	$ 6,434,934	$ 3,722	$ 3,722
31	Room A/C Replacement	Each	26	9%	26	9%	$ 19,978	9%	279	91%	279	91%	$ 214,383	91%	305	305	$ 234,362	$ 768	$ 768
32	Central A/C Replacement	Each	-	0%	-	0%	$ -	0%	6	100%	6	100%	$ 17,638	100%	6	6	$ 17,638	$ 2,940	$ 2,940
33	Heat Pump Replacement	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
34	Evaporative Coolers (Replacement)	Each	22	6%	14	5%	$ 14,630	6%	329	94%	248	95%	$ 218,781	94%	270	262	$ 233,411	$ 864	$ 891
35	Evaporative Coolers (Installation)	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
36	Duct Test and Seal	Home	53	8%	53	8%	$ 22,613	8%	650	92%	650	92%	$ 277,329	92%	703	703	$ 299,942	$ 427	$ 427
37	New - Energy Efficient Fan Control	Home	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
38	New - Prescriptive Duct Sealing	Home	2,558	11%	2,558	11%	$ 1,637,542	11%	20,867	89%	20,867	89%	$ 13,358,323	89%	23,425	23,425	$ 14,995,865	$ 640	$ 640
39	New - Smart Thermostat	Home	1,066	8%	1,029	8%	$ 263,177	8%	12,714	92%	12,433	92%	$ 3,138,871	92%	13,499	13,462	$ 3,402,049	$ 252	$ 253
40	CAM - HEAT Pump Split System	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
41	New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
42	New - A/C Time Delay	Home	-	0%	-	0%	$ -	0%	29	100%	27	100%	$ 7,464	100%	27	27	$ 7,464	$ 276	$ 276
43	New - Portable A/C	Each	-	0%	-	0%	$ -	0%	74	100%	74	100%	$ 42,199	100%	74	74	$ 42,199	$ 570	$ 570
44	**New - Wholehouse Fan**	Each	-	0%	-	0%	$ -	0%	2	100%	2	100%	$ 2,709	100%	2	2	$ 2,709	$ 1,355	$ 1,355
45	CAM - Programmable Thermostat	Each	-	-	-		$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
46	**Maintenance**																		
47	Furnace Clean and Tune	Home	-	-	-	0%	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
48	Central A/C Tune-up	Home	-	0%		0%		0%	5,721	100%	5,721	100%	$ 2,252,273	100%	5,721	5,721	$ 2,252,273	$ 394	$ 394
49	Evaporative Cooler Maintenance	Home	-	-	-	0%	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
50	**Lighting**																		
51	Exterior Hard wired LED fixtures	Each	1,627	3%	740	3%	$ 90,876	3%	48,569	97%	20,880	97%	$ 2,712,807	97%	22,507	21,620	$ 2,803,682	$ 125	$ 130
52	Interior Hard wired LED fixtures	Each	370	3%	140	3%	$ 18,806	3%	10,743	97%	4,269	97%	$ 546,036	97%	4,639	4,409	$ 564,842	$ 122	$ 128
53	Occupancy Sensor	Each	(1)	-9%	1	14%	$ (64)	-9%	12	109%	6	86%	$ 768	109%	5	7	$ 704	$ 141	$ 101
54	LED Torchiere	Each	133	22%	65	13%	$ 8,560	22%	472	78%	429	87%	$ 30,378	78%	562	494	$ 38,937	$ 69	$ 79
55	New - LED A-Lamps	Each	12,859	7%	3,271	6%	$ 107,385	7%	176,713	93%	49,598	94%	$ 1,475,727	93%	62,457	52,869	$ 1,583,113	$ 25	$ 30
56	New - LED R/BR Lamps	Each	5,899	11%	1,080	11%	$ 50,017	11%	46,686	89%	8,465	89%	$ 395,846	89%	14,364	9,545	$ 445,864	$ 31	$ 47
57	CAM - Exterior LED Lighting	Fixture	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
58	CAM - Exterior LED Lighting - Pool	Lamp	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
59	Exterior LED Lighting - Spa	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
60	CAM - Interior LED Fixture	Fixture	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
61	CAM - Interior LED Lighting	KiloLumen	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
62	CAM - Interior LED Screw-in	Lamp	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
63	CAM - Interior TLED Type A Lamps	Lamp	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
64	CAM - Interior TLED Type C Lamps	Lamp	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
65	CAM - Interior LED Exit Sign	Fixture	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
66	**Miscellaneous**																		
67	Smart Strip	Each	-	0%	-	0%	$ -	0%	18	100%	9	100%	$ 5,114	100%	9	9	$ 5,114	$ 568	$ 568
68	Smart Strip Tier II	Each	3,440	9%	1,530	8%	$ 241,618	9%	33,254	91%	16,525	92%	$ 2,335,690	91%	19,965	18,055	$ 2,577,308	$ 129	$ 143
69	Cold Storage	Each	-	0%	-	0%	$ -	0%	51	100%	51	100%	$ 16,305	100%	51	51	$ 16,305	$ 320	$ 320
70	Pool Pump	Each	-	0%	-	0%	$ -	0%	5	100%	5	100%	$ 8,613	100%	5	5	$ 8,613	$ 1,723	$ 1,723
71	NEW - Air Purifier	Each	21	18%	21	18%	$ 5,150	18%	99	83%	99	83%	$ 24,279	83%	120	120	$ 29,429	$ 245	$ 245
72	**Ancillary Services**																		
73	Commissioning	Home	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
74	CAM - Audit	Home	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
75	**Customer Enrollment**																		
76	ESA In-Home Energy Education	Home	67,567																
77	ESA Outreach & Assessment	Home	67,567																

78 [1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit) . There are no Pilot Plus/Deep data to report because PG&E did not complete pilot projects in 2022.

ESA Table 7 - Expenditures Recorded by Cost Element [1]
Pacific Gas and Electric Company
Program Year 2022 Annual Report

ESA Program:	Labor [1]	Non-Labor [2]	Contractor [3]	Total
Energy Efficiency				
ESA Main Program (SF, MH, MF In-Unit)				
Appliances	$ -	$ -	$ 10,633,588	$ 10,633,588
Domestic Hot Water	$ -	$ -	$ 8,229,421	$ 8,229,421
Enclosure	$ -	$ -	$ 29,061,927	$ 29,061,927
HVAC	$ -	$ -	$ 30,465,005	$ 30,465,005
Maintenance	$ -	$ -	$ -	$ -
Lighting	$ -	$ -	$ 5,710,644	$ 5,710,644
Miscellaneous	$ -	$ -	$ 2,803,300	$ 2,803,300
Customer Enrollment	$ -	$ -	$ 11,712,159	$ 11,712,159
In Home Education	$ -	$ -	$ 5,378,759	$ 5,378,759
Pilot	$ -	$ -	$ 152,563	$ 152,563
Implementation [4]	$ -	$ -	$ 5,470,360	$ 5,470,360
Safety - Unexpected overhead costs	$ -	$ -	$ 171,817	$ 171,817
Multi-Family SPOC	$ -	$ -	$ 248,185	$ 248,185
Multi-Family Common Area Measures	$ 9,538	$ -	$ 6,300,365	$ 6,309,903
Multi-Family Whole Building	$ -	$ -	$ -	$ -
Building Electrification (SCE Only)	$ -	$ -	$ -	$ -
Clean Energy Homes (SCE Only)	$ -	$ -	$ -	$ -
CSD Leveraging	$ 1,538	$ -	$ -	$ 1,538
MCE LIFT PILOT	$ -	$ 2,600,000	$ -	$ 2,600,000
Energy Efficiency TOTAL	**$ 11,076**	**$ 2,600,000**	**$ 116,338,092**	**$ 118,949,168**
Training Center	$ 191,696	$ 50,397	$ 365,559	$ 607,652
Workforce Education and Training				$ -
Inspections	$ 2,605,863	$ 3,686	$ -	$ 2,609,549
Marketing and Outreach	$ 385,484	$ 421,109	$ 1,669,613	$ 2,476,207
Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -
Measurement and Evaluation Studies	$ -	$ -	$ 117,516	$ 117,516
Regulatory Compliance	$ 486,245	$ 364	$ 80,300	$ 566,910
General Administration	$ 5,107,417	$ -	$ 1,836,238	$ 6,943,655
CPUC Energy Division	$ -	$ -	$ 50,921	$ 50,921
Administration TOTAL	**$ 8,776,705**	**$ 475,556**	**$ 4,120,146**	**$ 13,372,408**
Pilot Plus and Pilot Deep [5]	$ 313,877	$ 84	$ 593,800	$ 907,761
TOTAL PROGRAM COSTS	**$ 9,101,658**	**$ 3,075,640**	**$ 121,052,039**	**$ 133,229,337**

[1] Labor costs include any internal direct costs (administrative and/or implementation), burdened by overhead, that represents person hours.
[2] Non-Labor costs include all direct internal costs (administrative and/or implementation) not covered under labor.
[3] Contract costs include all outsourced costs (administrative and/or implementation). Contract costs do not need to be further broken out by labor/non-labor.
[4] This budget category includes the primary Implementer(s) administrative fee for ESA Main.
[5] PG&E did not complete Pilot Plus/Deep projects in 2022.

Note:
*MFWB implementation to occur no earlier than January 2023.

ESA Table 8 - Homes Unwilling / Unable to Participate [1]
Pacific Gas and Electric Company
Program Year 2022 Annual Report

	Reason Provided							
County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
ALAMEDA	129	2,667	3	389	68	261	227
ALPINE	-	-	-	-	-	-	-
AMADOR	7	87	1	13	-	1	32
BUTTE	55	319	4	56	27	3	58
CALAVERAS	4	70	-	1	1	2	19
COLUSA	11	86	-	4	4	3	7
CONTRA COSTA	306	2,443	2	480	154	422	329
EL DORADO	22	160	-	33	4	3	61
FRESNO	187	1,849	32	56	57	39	208
GLENN	10	69	-	5	8	3	4
HUMBOLDT	14	15	1	3	7	-	5
KERN	175	2,309	7	80	46	243	427
KINGS	2	72	-	1	1	1	7
LAKE	10	296	3	10	12	8	2
LASSEN	-	-	-	-	-	-	-
MADERA	95	265	3	12	29	4	37
MARIN	12	295	1	32	3	17	9
MARIPOSA	6	5	-	-	1	-	6
MENDOCINO	3	47	-	1	1	-	-
MERCED	174	739	10	32	96	4	96
MONTEREY	73	502	-	132	12	119	240
NAPA	59	176	-	102	35	37	24
NEVADA	17	274	-	24	1	7	49
PLACER	34	205	-	48	18	15	40
PLUMAS	1	8	-	-	-	-	-
SACRAMENTO	339	580	4	121	56	21	170
SAN BENITO	19	104	-	19	7	12	9
SAN BERNARDINO	-	-	-	-	-	-	-
SAN FRANCISCO	19	690	1	137	10	55	44
SAN JOAQUIN	160	1,379	12	154	77	97	91
SAN LUIS OBISPO	17	574	-	5	14	-	24
SAN MATEO	3	68	-	2	11	-	3
SANTA BARBARA	4	517	-	4	2	-	103
SANTA CLARA	130	771	4	5	43	4	47
SANTA CRUZ	52	472	-	25	7	34	48
SHASTA	68	252	27	31	38	24	65
SIERRA	-	3	-	-	-	-	-
SISKIYOU	-	-	-	-	-	-	-
SOLANO	54	234	2	172	37	61	78
SONOMA	69	240	-	35	31	20	61
STANISLAUS	49	888	5	9	18	9	15
SUTTER	26	136	3	22	32	9	13
TEHAMA	36	124	17	8	30	6	40
TRINITY	-	-	-	-	-	-	-
TULARE	1	16	-	-	-	1	13
TUOLUMNE	6	48	-	7	2	-	16
YOLO	234	160	1	55	18	5	82
YUBA	36	110	3	12	16	7	10
Total	**2,728**	**20,324**	**146**	**2,337**	**1,034**	**1,557**	**2,819**

	Reason Provided - ESA Main						
County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
ALAMEDA	129	2,667	3	389	68	261	226
ALPINE	-	-	-	-	-	-	-
AMADOR	7	87	1	13	-	1	32
BUTTE	55	319	4	56	27	3	58
CALAVERAS	4	70	-	1	1	2	19
COLUSA	11	86	-	4	4	3	7
CONTRA COSTA	306	2,443	2	480	154	422	329
EL DORADO	22	160	-	33	4	3	60
FRESNO	187	1,849	32	56	57	39	207
GLENN	10	69	-	5	8	3	4
HUMBOLDT	14	15	1	3	7	-	4
KERN	175	2,309	7	80	46	243	426
KINGS	2	72	-	1	1	1	7
LAKE	10	296	3	10	12	8	1
LASSEN	-	-	-	-	-	-	-
MADERA	95	265	3	12	29	4	37
MARIN	12	295	1	32	3	17	9
MARIPOSA	6	5	-	-	1	-	6
MENDOCINO	3	47	-	1	1	-	-
MERCED	174	739	10	30	96	4	95
MONTEREY	73	502	-	132	12	119	239
NAPA	59	176	-	102	35	37	24
NEVADA	17	274	-	24	1	7	49
PLACER	34	205	-	48	18	15	39
PLUMAS	1	8	-	-	-	-	-
SACRAMENTO	339	580	4	121	56	21	168
SAN BENITO	19	104	-	19	7	12	9
SAN BERNARDINO	-	-	-	-	-	-	-
SAN FRANCISCO	19	690	1	137	10	55	44
SAN JOAQUIN	160	1,379	11	153	77	97	88
SAN LUIS OBISPO	17	574	-	5	14	-	24
SAN MATEO	3	68	-	2	11	-	3
SANTA BARBARA	4	517	-	4	2	-	103
SANTA CLARA	130	771	4	5	43	4	46
SANTA CRUZ	52	472	-	25	7	34	48
SHASTA	68	252	27	31	37	24	65
SIERRA	-	3	-	-	-	-	-
SISKIYOU	-	-	-	-	-	-	-
SOLANO	54	234	2	172	37	61	78
SONOMA	69	240	-	35	31	20	61
STANISLAUS	49	888	5	9	18	9	14
SUTTER	26	136	3	22	32	9	13
TEHAMA	36	124	17	8	30	6	39
TRINITY	-	-	-	-	-	-	-
TULARE	1	16	-	-	-	1	13
TUOLUMNE	6	48	-	7	2	-	16
YOLO	234	160	1	55	18	5	81
YUBA	36	110	3	12	16	7	9
Total	**2,728**	**20,324**	**145**	**2,334**	**1,033**	**1,557**	**2,800**

	Reason Provided - PP/PD							
County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
ALAMEDA							1
ALPINE							
AMADOR							
BUTTE							
CALAVERAS							
COLUSA							
CONTRA COSTA							
EL DORADO							1
FRESNO							1
GLENN							
HUMBOLDT							1
KERN							1
KINGS							
LAKE							1
LASSEN							
MADERA							
MARIN							
MARIPOSA							
MENDOCINO							
MERCED				2			1
MONTEREY							1
NAPA							
NEVADA							
PLACER							1
PLUMAS							
SACRAMENTO							2
SAN BENITO							
SAN BERNARDINO							
SAN FRANCISCO							
SAN JOAQUIN			1	1			3
SAN LUIS OBISPO							
SAN MATEO							
SANTA BARBARA							
SANTA CLARA							1
SANTA CRUZ							
SHASTA					1		
SIERRA							
SISKIYOU							
SOLANO							
SONOMA							
STANISLAUS							1
SUTTER							
TEHAMA							1
TRINITY							
TULARE							
TUOLUMNE							
YOLO							1
YUBA							1
Total	**-**	**-**	**1**	**3**	**1**	**-**	**19**

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), Pilot Plus and Deep, MF CAM, MFWB, CSD Leveraging, and Building Electrification.

Note:
*MFWB implementation to occur no earlier than January 2023.

ESAP Coordinated Treatment (SCE and SCG Only)

Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency [1]					
# of Households Received Measures from one Utility, but not other Utility or Partnering Agency	# of Customer Unwilling/Declined Program Measures	# of Customer Unavailable - Scheduling Conflicts	# of Hazardous Environment (unsafe/unclean)	# of Landlord Refused to Authorize Participation	# of Other Infeasible/ Ineligible
	-	-	-	-	-
	-	-	-	-	-
Total	-	-	-	-	-

Electrification.

Note:
*MFWB implementation to occur no earlier than January 2023.

ESA Table 9 - ESA Main Life Cycle Bill Savings by Measure (SF, MH, MF In-Unit) [1]
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Measure Name	Unit	2022 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings
Appliances						
High Efficiency Clothes Washer	Each	2,289	423,465.00	44,027.00	11	$ 1,297,221
Refrigerator	Each	7,869	4,366,162.02	-	15	$ 8,657,913
Microwave	Each	-	-	-	-	$ -
New - Freezer	Each	-	-	-	-	$ -
Domestic Hot Water						
Other Domestic Hot Water	Home	51,498	293,184.74	260,230.80	8	$ 3,238,420
Water Heater Tank and Pipe Insulation	Home	6,829	25,029.00	27,103.47	8	$ 330,576
Water Heater Repair/Replacement	Each	1,423	-	11,121.31	15	$ 200,344
Combined Showerhead/TSV	Each	-	-	-	-	$ -
New - Heat Pump Water Heater	Each	150	267,716.2	-	10	$ 391,322
New - Tub Diverter/ Tub Spout	Each	304	7.00	570.60	8	$ 6,326
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -
Enclosure						
Air Sealing / Envelope	Home	44,303	2,037,938.00	177,212.00	9	$ 4,898,643
Caulking	Home	-	-	-	-	$ -
Attic Insulation	Home	1,707	20,191.16	75,500.91	20	$ 1,695,147
HVAC						
FAU Standing Pilot Conversion	Each	-	-	-	-	$ -
Furnace Repair/Replacement	Each	1,729	-	(42,217.72)	16	$ (795,474)
Room A/C Replacement	Each	305	(57,469.67)	-	15	$ (113,960)
Central A/C replacement	Each	6	2,358.95	-	18	$ 5,295
Heat Pump Replacement	Each	-	-	-	-	$ -
Evaporative Cooler (Replacement)	Each	351	138,727.81	-	15	$ 275,091
Evaporative Cooler (Installation)	Each	-	-	-	-	$ -
Duct Test and Seal	Home	703	(940.12)	-	25	$ (2,572)
New - Energy Efficient Fan Control	Home	-	-	-	-	$ -
New - Prescriptive Duct Sealing	Home	23,425	3659687.75	258377.75	25	$ 16,432,771
New - Portable A/C	Each	74	0	0	9	$ -
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -
New - Wholehouse Fan	Each	2	366.79	(1.74)	20	$ 843
New - A/C Time Delay	Home	29	6,358.98	-	10	$ 9,295
New - Smart Thermostat	Home	13,780	2,883,599.20	388,693.83	9	$ 8,614,273
Maintenance						
Furnace Clean and Tune	Home	-	-	-	-	$ -
Central A/C Tune-up	Home	5,721	779,378.51	(94.54)	15	$ 1,543,771
Lighting						
Interior Hard wired LED fixtures	Each	11,113	760,189.61	(17,096.67)	16	$ 1,254,548
Exterior Hard wired LED fixtures	Each	50,196	258,158.03	-	16	$ 535,438
LED Torchiere	Each	605	42,648.35	(970.89)	16	$ 70,162
Occupancy Sensor	Each	11	320.2013094	0	8	390.2271911
LED Night Light	Each	-	-	-	-	$ -
New - LED R/BR Lamps	Each	52,585	597,418.19	(12,515.23)	16	$ 1,003,273
New - LED A-Lamps	Each	189,572	1,820,459.92	(4,303.28)	16	$ 3,694,677
Miscellaneous						
Pool Pumps	Each	5	5,464.65	-	10	$ 7,988
New - Air Purifier	Each	120	-	-	9	$ -
New - CO and Smoke Alarm	Each	-	-	-	-	$ -
New - Comprehensive Home Health and Safety	Home	-	-	-	-	$ -
Cold Storage	Each	51	-	-	5	$ -
Smart Strip	Each	18	-	-	5	$ -
Smart Strip Tier II	Each	36,694	6,271,496.00	-	5	$ 5,088,520
Pilots						
	-	-	-	-	-	-
Total						**$ 58,340,240**
Total Homes Served By the Program	**67,567**	-	-	-	-	-
Life Cycle Bill Savings Per Home	**$ 863**	-	-	-	-	-

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit).

Notes:
*Savings estimates are sourced from the most recent ESA Impact Evaluation; measures not included in the Impact Evaluation utilize values
*Per measure kWh and therm impacts are presented as total kWh savings divided by total participants and total therm savings divided by total participants.
*Average rates for kWh and therms paid by ESA participants in 2022 was used to calculate lifecycle bill savings.

	A	B	C	D	E	F	G
1	**ESA Table 9A - ESA MF CAM Life Cycle Bill Savings by Measure**						
2	**Pacific Gas and Electric Company**						
3	**Program Year 2022 Annual Report**						
4							
5	**MF CAM Measure Name[1]**	**Unit**	**2022 Number Installed**	**Per Measure Electric Impact (kWh)**	**Per Measure Gas Impact (Therms)**	**Effective Useful Life (years)**	**2022 Total Measure Life Cycle Bill Savings**
6	**Appliances**						
7	High Efficiency Clothes Washer	Each	0	0	0	-	$ -
8	Refrigerator	Each	7	52.95	(1.45)	14	$ 560
9	**Domestic Hot Water**						
10	Non-Condensing Domestic Hot Water Boiler	Cap-kBtuh	0	-	-	-	$ -
11	Condensing Domestic Hot Water Boiler	Cap-kBtuh	14449	-	3.37	20	$ 795,861
12	Storage Water Heater	Cap-kBtuh	16503.48	-	4.02	11	$ 670,245
13	Tankless Water Heater	Cap-kBtuh	6885	(0.01)	1.78	20	$ 168,911
14	Heat Pump Water Heater	kW		-	-	-	$ -
15	Demand Control DHW Recirculation Pump	Each	87	-	5.84	15	$ 49,273
16	Low flow Showerhead	Each	13	-	7.13	10	$ 909
17	Faucet Aerator	Each	0	-	-	-	$ -
18	**Envelope**						
19	Attic Insulation	Sq Ft	7491	0.06	0.00	20	$ 2,134
20	Wall Insulation Blow-in	Sq Ft	0	-	-	-	$ -
21	Windows	Sq Ft	1600.21	2.84	0.02	20	$ 9,693
22	**HVAC**						
23	Air Conditioners Split System	Cap-Tons	91.8	65.55	(1.29)	15	$ 7,648
24	Heat Pump Split System	Cap-Tons	35	124.71	-	15	$ 7,300
25	Packaged Air Conditioner	Cap-Tons	26.5	411.58	9.98	15	$ 19,166
26	Package Terminal A/C	Cap-Tons	0	-	-	-	$ -
27	Package Terminal Heat Pump	Cap-Tons	0	-	-	-	$ -
28	Furnace Replacement	Cap-kBtuh	2336	0.50	0.48	20	$ 16,695
29	Space Heating Boiler	Cap-kBtuh	3300	(1.48)	0.41	20	$ 951
30	Smart Thermostat	Each	48	80.02	6.48	9	$ 7,076
31	**Lighting**						
32	Interior LED Lighting	Each	1433	133.05	(1.66)	11	$ 135,747
33	Interior TLED Type A Lamps	Each	N/A	N/A	N/A	-	$ -
34	Interior TLED Type C Lamps	Each	N/A	N/A	N/A	-	$ -
35	LED T8 Lamp - Interior	Each	1272	223.48	-3.87	5	$ 80,964
36	LED T8 Lamp - Exterior	Each	250	119.22	-	5	$ 9,788
37	Interior LED Fixture	Each	1536	561.42	(8.11)	10	$ 427,568
38	Interior LED Screw-in	Each	838	138.04	(1.51)	2	$ 26,969
39	Interior LED Exit Sign	Each	107	205.86	(3.56)	0	$ -
40	Exterior LED Lighting	Each	24	263.63	-	15	$ 6,858
41	LED Parking Garage Fixtures	Each	0	-	-	-	$ -
42	LED Exterior Wall or Pole Mounted Fixture	Each	969	539.64	-	13	$ 693,979
43	LED Corn Lamp for Exterior Wall or Pole Mounted	Each	41	539.92	-	5	$ 6,678
44	Exterior LED Lighting - Pool	Each	N/A	N/A	N/A	-	$ -
45	Wall or Ceiling Mounted Occupancy Sensor	Each	103	48.38	(0.84)	8	$ 5,128
46	**Miscellanous**						
47	Tier-2 Smart Power Strip	Each	2	130.00	(2.25)	5	$ 306
48	**Total**						**$ 3,150,407**
49							
50	**Total Properties Served By the Program**	**45**					
51	**Life Cycle Bill Savings Per Property**	**$ 70,009**					
52	[1] Measures are customized by each IOU. Measures list may change based on available information on both costs and benefits and may vary across climate zones.						
53							
54	**Notes:**						
55	*Per measure kWh and therm impacts are presented as total kWh savings divided by total participants and total therm savings divided by total participants.						
56	*Average rates for kWh and therms paid by ESA participants in 2022 was used to calculate lifecycle bill savings.						

	A	B	C	D	E	F	G
1	**ESA Table 9B - ESA Pilot Plus and Pilot Deep Life Cycle Bill Savings by Measure [1]**						
2	**Pacific Gas and Electric Company**						
3	**Program Year 2022 Annual Report**						
4							
5	**Measure Name**	**Unit**	**2022 Number Installed**	**Per Measure Electric Impact (kWh)**	**Per Measure Gas Impact (Therms)**	**Effective Useful Life (years)**	**2022 Total Measure Life Cycle Bill Savings**
6	**Appliances**						
7	High Efficiency Clothes Washer	Each	-	N/A	N/A	N/A	N/A
8	Refrigerator	Each	-	N/A	N/A	N/A	N/A
9	Microwave	Each	-	N/A	N/A	N/A	N/A
10	New - Freezer	Each	-	N/A	N/A	N/A	N/A
11	**Domestic Hot Water**						
12	Other Domestic Hot Water	Home	-	N/A	N/A	N/A	N/A
13	Water Heater Tank and Pipe Insulation	Home	-	N/A	N/A	N/A	N/A
14	Water Heater Repair/Replacement	Each	-	N/A	N/A	N/A	N/A
15	Combined Showerhead/TSV	Each	-	N/A	N/A	N/A	N/A
16	New - Heat Pump Water Heater	Each	-	N/A	N/A	N/A	N/A
17	New - Tub Diverter/ Tub Spout	Each	-	N/A	N/A	N/A	N/A
18	New - Thermostat-controlled Shower Valve	Each	-	N/A	N/A	N/A	N/A
19	**Enclosure**						
20	Air Sealing / Envelope	Home	-	N/A	N/A	N/A	N/A
21	Caulking	Home	-	N/A	N/A	N/A	N/A
22	Attic Insulation	Home	-	N/A	N/A	N/A	N/A
23	**HVAC**						
24	FAU Standing Pilot Conversion	Each	-	N/A	N/A	N/A	N/A
25	Furnace Repair/Replacement	Each	-	N/A	N/A	N/A	N/A
26	Room A/C Replacement	Each	-	N/A	N/A	N/A	N/A
27	Central A/C replacement	Each	-	N/A	N/A	N/A	N/A
28	Heat Pump Replacement	Each	-	N/A	N/A	N/A	N/A
29	Evaporative Cooler (Replacement)	Each	-	N/A	N/A	N/A	N/A
30	Evaporative Cooler (Installation)	Each	-	N/A	N/A	N/A	N/A
31	Duct Test and Seal	Home	-	N/A	N/A	N/A	N/A
32	New - Energy Efficient Fan Control	Home	-	N/A	N/A	N/A	N/A
33	New - Prescriptive Duct Sealing	Home	-	N/A	N/A	N/A	N/A
34	New - High Efficiency Forced Air Unit (HE FAU)	Home	-	N/A	N/A	N/A	N/A
35	New - A/C Time Delay	Home	-	N/A	N/A	N/A	N/A
36	New - Smart Thermostat	Home	-	N/A	N/A	N/A	N/A
37	**Maintenance**						
38	Furnace Clean and Tune	Home	-	N/A	N/A	N/A	N/A
39	Central A/C Tune-up	Home	-	N/A	N/A	N/A	N/A
40	**Lighting**						
41	Interior Hard wired LED fixtures	Each	-	N/A	N/A	N/A	N/A
42	Exterior Hard wired LED fixtures	Each	-	N/A	N/A	N/A	N/A
43	LED Torchiere	Each	-	N/A	N/A	N/A	N/A
44	Occupancy Sensor	Each	-	N/A	N/A	N/A	N/A
45	LED Night Light	Each	-	N/A	N/A	N/A	N/A
46	New - LED R/BR Lamps	Each	-	N/A	N/A	N/A	N/A
47	New - LED A-Lamps	Each	-	N/A	N/A	N/A	N/A
48	**Miscellaneous**						
49	Pool Pumps	Each	-	N/A	N/A	N/A	N/A
50	Smart Strip	Each	-	N/A	N/A	N/A	N/A
51	Smart Strip Tier II	Each	-	N/A	N/A	N/A	N/A
52	**Pilots**						
53	-	-	-	-	-	-	-
54	**Total**		**-**	**N/A**	**N/A**	**N/A**	**N/A**
55							
56	**Total Homes Served By the Program**	**-**					
57	**Life Cycle Bill Savings Per Home**	N/A					
58	[1] PG&E did not complete Pilot Plus/Deep projects in 2022. There are no savings to report.						

ESA Table 9C - Building Electrification Life Cycle Bill Savings by Measure (SCE Only)
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Measure Name	Unit	2022 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings
Appliances						
High Efficiency Clothes Washer	Each					
Refrigerator	Each					
Microwave	Each					
New - Freezer	Each					
Domestic Hot Water						
Other Domestic Hot Water	Home					
Water Heater Tank and Pipe Insulation	Home					
Water Heater Repair/Replacement	Each					
Combined Showerhead/TSV	Each					
New - Heat Pump Water Heater	Each					
New - Tub Diverter/ Tub Spout	Each					
New - Thermostat-controlled Shower Valve	Each					
Enclosure						
Air Sealing / Envelope	Home					
Caulking	Home					
Attic Insulation	Home					
HVAC						
FAU Standing Pilot Conversion	Each					
Furnace Repair/Replacement	Each					
Room A/C Replacement	Each					
Central A/C replacement	Each					
Heat Pump Replacement	Each					
Evaporative Cooler (Replacement)	Each					
Evaporative Cooler (Installation)	Each					
Duct Test and Seal	Home					
New - Energy Efficient Fan Control	Home					
New - Prescriptive Duct Sealing	Home					
New - High Efficiency Forced Air Unit (HE FAU)	Home					
New - A/C Time Delay	Home					
New - Smart Thermostat	Home					
Maintenance						
Furnace Clean and Tune	Home					
Central A/C Tune-up	Home					
Lighting						
Interior Hard wired LED fixtures	Each					
Exterior Hard wired LED fixtures	Each					
LED Torchiere	Each					
Occupancy Sensor	Each					
LED Night Light	Each					
New - LED R/BR Lamps	Each					
New - LED A-Lamps	Each					
Miscellaneous						
Pool Pumps	Each					
Smart Strip	Each					
Smart Strip Tier II	Each					
Pilots						
-	-	-	-	-	-	-
Total						$ -
Total Homes Served By the Program	-	-	-	-	-	-
Life Cycle Bill Savings Per Home	N/A	-	-	-	-	-

Notes:

*Savings estimates are sourced from the PY 2015 to 2017 ESA Impact Evaluation; Energy Division instructed the IOUs to use these results for

*Per measure kWh and therm impacts are presented as total kWh savings divided by total participants and total therm savings divided by total participants.

*Average rates for kWh and therms paid by ESA participants in 2020 was used to calculate lifecycle bill savings.

ESA Table 10 - ESA Energy Rate Used for Bill Savings Calculations [1]
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Residential Energy Rate Used for Bill Savings Calculations [2]		
Year	$/kWh	$/Therm
2022	0.1769	1.6075
2023	0.3462	3.1454
2024	0.5082	4.6167
2025	0.6631	6.0243
2026	0.8114	7.3710
2027	0.9532	8.6594
2028	1.0889	9.8921
2029	1.2187	11.0714
2030	1.3429	12.1996
2031	1.4617	13.2791
2032	1.5754	14.3118
2033	1.6841	15.2997
2034	1.7882	16.2450
2035	1.8877	17.1493
2036	1.9830	18.0145
2037	2.0741	18.8422
2038	2.1612	19.6341
2039	2.2446	20.3917
2040	2.3244	21.1165
2041	2.4008	21.8100
2042	2.4738	22.4734
2043	2.5436	23.1081
2044	2.6105	23.7154
2045	2.6744	24.2963
2046	2.7356	24.8522

Non-Residential Energy Rate Used for Bill Savings Calculations (MF In-Unit, MF CAM, MFWB) [3]		
Year	$/kWh	$/Therm
2022	0.1900	1.2200
2023	0.3718	2.3872
2024	0.5457	3.5039
2025	0.7121	4.5722
2026	0.8712	5.5943
2027	1.0235	6.5722
2028	1.1692	7.5077
2029	1.3086	8.4027
2030	1.4420	9.2590
2031	1.5696	10.0782
2032	1.6916	10.8620
2033	1.8084	11.6119
2034	1.9201	12.3292
2035	2.0270	13.0156
2036	2.1293	13.6722
2037	2.2271	14.3004
2038	2.3207	14.9014
2039	2.4103	15.4764
2040	2.4959	16.0265
2041	2.5779	16.5528
2042	2.6563	17.0564
2043	2.7313	17.5381
2044	2.8031	17.9990
2045	2.8718	18.4399
2046	2.9375	18.8617

[1] For 2022, the average cost per kWh and therm paid by ESA participants is shown. Cost is escalated 3% annually for remaining years. These values do not include adjustments for TOU rates. Only the 2022 value is used to calculate lifecycle bill savings for this report.

[2] Summary includes ESA Main Program (SF, MH, MF-In-Unit), CSD Leveraging, and Building Electrification. Clean Energy Homes is not applicable. There are no Pilot Plus/Deep data to report because PG&E did not complete pilot projects in 2022.

[3] Summary data includes ESA MF CAM and MFWB. MF In-Unit is shown in residential rates. For 2022, the average cost per kWh and therm paid is based on the average data of completed CAM project. Cost is discounted 7.99% annually for remaining years. Lifecycle bill savings are calculated based on the actual useful life of installed measures

Note:

*MFWB implementation to occur no earlier than January 2023.

ESA Table 11 - ESA Bill Savings Calculations by Program Year
Pacific Gas and Electric Company
Program Year 2022 Annual Report

ESA Table 11

Bill Savings Calculations by Program Year (ESA Main - SF, MH, MF-In-Unit)

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2011	$ 145,900,978	$ 58,889,388	0.40	$ 460
2012	$ 131,145,519	$ 44,191,560	0.34	$ 384
2013	$ 142,181,389	$ 54,007,801	0.38	$ 437
2014	$ 145,940,449	$ 53,008,314	0.36	$ 429
2015	$ 136,775,345	$ 63,956,471	0.47	$ 636
2016	$ 105,094,305	$ 52,052,655	0.50	$ 700
2017	$ 122,778,059	$ 106,566,378	0.87	$ 1,224
2018	$ 122,576,966	$ 102,803,203	0.84	$ 1,207
2019	$ 168,368,608	$ 92,267,012	0.55	$ 865
2020	$ 133,404,957	$ 80,411,595	0.60	$ 930
2021	$ 155,136,501	$ 100,062,749	0.64	$ 970
2022	**$ 123,161,951**	**$ 58,340,240**	**0.47**	**$ 863**

ESA Table 11A

Bill Savings Calculations by Program Year (Pilot Plus and Pilot Deep) [1]

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022	**$ 907,761**	**N/A**	**N/A**	**N/A**

[1] PG&E did not complete Pilot Plus/Deep projects in 2022.

Note:
*Data for program years prior to 2022 is not applicable as program not authorized until D.21-06-015.

ESA Table 11B

Bill Savings Calculations by Program Year - MF CAM and MFWB [1]

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Property Average Lifecycle Bill Savings
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022	**$ 6,309,903**	**$ 4,517,144**	**0.72**	**$ 70,009**

[1] Summary data includes ESA MF CAM and MFWB. MF In-Unit is shown in ESA Main. MFWB implementation to occur no earlier than January 2023, therefore this data only reflects MF CAM.

ESA Table 11C

Bill Savings Calculations by Program Year - Building Electrification (SCE Only)

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022	**-**	**-**	**-**	**-**

Note:
*Data for program years prior to 2022 is not applicable as program not authorized until D.21-06-015.

ESA Table 12 - ESA Fund Shifting
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Program Year 2022	Budget			Expenditures			(Shift) or Carried Forward			FUND SHIFT AMOUNT									Total Shifted Gas/ Electric	%of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization
										Among Categories within Program Year 1-3			Carry Forward from 2021			Carry Back from 2023								
	Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures	Variance			(1) Shift of Current Year Authorized [1]			(2) Shift of Carry Forward [2]			(3) Shift of Carry Back								
							Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total						
Energy Efficiency																								
Appliance	$ 10,200,968	$ -	**$ 10,200,968**	$ 10,633,588	$ -	**$ 10,633,588**	$ (432,620)	$ -	**$ (432,620)**	$ 432,620	$ -	**$ 432,620**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 432,620	0.2%	1. Current Year Authorized	1. 2022	1. Shift $432,620 from Customer Enrollment electric to Applicance electric.	1. D.21-06-015
Domestic Hot Water	$ 1,111,675	$ 5,794,765	**$ 6,906,440**	$ 377,876	$ 7,851,544	**$ 8,229,421**	$ 733,799	$ (2,056,779)	**$ (1,322,981)**	$ (733,799)	$ 2,056,779	**$ 1,322,981**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 1,322,981	0.7%	1. Current Year Authorized 2. Current Year Authorized 3. Current Year Authorized	1. 2022 2. 2022 3. 2022	1. Shift $733,799 from Domestic Hot Water electric to Domestic Hot Water gas. 2. Shift $929,171 from Customer Enrollment electric to Domestic Hot Water gas. 3. Shift $393,809 from Program Admin electric and gas to Domestic Hot Water gas.	1. D.21-06-015 2. D.21-06-015 3. D.21-06-015
Enclosure	$ 236,147	$ 23,378,299	**$ 23,614,446**	$ 290,619	$ 28,771,308	**$ 29,061,927**	$ (54,472)	$ (5,393,009)	**$ (5,447,481)**	$ 54,472	$ 5,393,009	**$ 5,447,481**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 5,447,481	3.0%	1. Current Year Authorized 2. Current Year Authorized 3. Current Year Authorized 4. Current Year Authorized 5. Current Year Authorized	1. 2022 2. 2022 3. 2022 4. 2022 5. 2022	1. Shift $54,472 from Customer Enrollment electric to Enclosure electric. 2. Shift $36,991 from Customer Enrollment electric to Enclosure gas. 3. Shift $856,063 from Leveraging gas to Enclosure gas. 4. Shift $1,814,163 from Leveraging electric to Enclosure gas. 5. Shift $2,685,793 from MF CAM electric to Enclosure gas.	1. D.21-06-015 2. D.21-06-015 3. D.21-06-015 4. D.21-06-015 5. D.21-06-015
HVAC	$ 11,294,053	$ 6,498,976	**$ 17,793,029**	$ 4,618,669	$ 25,846,335	**$ 30,465,005**	$ 6,675,384	$ (19,347,359)	**$ (12,671,976)**	$ (6,675,384)	$ 19,347,359	**$ 12,671,976**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 12,671,976	7.0%	1. Current Year Authorized 2. Current Year Authorized 3. Current Year Authorized 4. Current Year Authorized	1. 2022 2. 2022 3. 2022 4. 2022	1. Shift $6,675,384 from HVAC electric to HVAC gas. 2. Shift $2,423,788 from Customer Enrollment gas to HVAC gas. 3. Shift $566,129 from Customer Enrollment electric to HVAC gas. 4. Shift $9,682,058 from Misc electric to HVAC gas.	1. D.21-06-015 2. D.21-06-015 3. D.21-06-015 4. D.21-06-015
Maintenance	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	-	-	-	-
Lighting	$ 5,542,434	$ -	**$ 5,542,434**	$ 5,710,644	$ -	**$ 5,710,644**	$ (168,210)	$ -	**$ (168,210)**	$ 168,210	$ -	**$ 168,210**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 168,210	0.1%	1. Current Year Authorized	1. 2022	1. Shift $168,210 from Customer Enrollment electric to Lighting electric.	1. D.21-06-015
Miscellaneous	$ 12,485,358	$ -	**$ 12,485,358**	$ 2,803,300	$ -	**$ 2,803,300**	$ 9,682,058	$ -	**$ 9,682,058**	$ (9,682,058)	$ -	**$ (9,682,058)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (9,682,058)	-5.3%	1. Current Year Authorized	1. 2022	1. Shift $9,682,058 from Misc electric to HVAC gas.	1. D.21-06-015
Customer Enrollment	$ 8,940,653	$ 7,928,503	**$ 16,869,156**	$ 6,207,444	$ 5,504,715	**$ 11,712,159**	$ 2,733,209	$ 2,423,788	**$ 5,156,997**	$ (2,733,209)	$ (2,423,788)	**$ (5,156,997)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (5,156,997)	-2.8%	1. Current Year Authorized 2. Current Year Authorized 3. Current Year Authorized	1. 2022 2. 2022 3. 2022	1. Shift $1,200,918 from Customer Enrollment electric to Applicance electric, Enclosure electric, Lighting electric, In-Home Energy Education electric, Implementation electric, and Safety - Unexpected Overhead Costs electric. 2. Shift $1,532,291 from Customer Enrollment electric to Domestic Hot Water gas, Enclosure gas, and HVAC gas. 3. Shift $2,423,788 from Customer Enrollment gas to HVAC gas.	1. D.21-06-015 2. D.21-06-015 3. D.21-06-015
In Home Education	$ 2,657,489	$ 2,356,641	**$ 5,014,130**	$ 2,850,742	$ 2,528,017	**$ 5,378,759**	$ (193,253)	$ (171,376)	**$ (364,629)**	$ 193,253	$ 171,376	**$ 364,629**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 364,629	0.2%	1. Current Year Authorized 2. Current Year Authorized	1. 2022 2. 2022	1. Shift $193,253 from Customer Enrollment electric to In-Home Energy Education electric. 2. Shift $171,376 from Program Admin electric and gas to In Home Education gas.	1. D.21-06-015 2. D.21-06-015
Pilot	$ 303,922	$ 269,516	**$ 573,438**	$ 80,858	$ 71,704	**$ 152,563**	$ 223,064	$ 197,812	**$ 420,876**	$ -	$ -	**$ -**	$ 131,672	$ 116,766	**$ 248,438**	$ -	$ -	**$ -**	$ 248,438	0.1%	1. N/A 2. Carried Forward 3. N/A	1. N/A 2. 2021 3. N/A	1. N/A 2. Shift from 2021 to 2022 3. N/A	1. N/A 2. D.21-06-015 3. N/A
Implementation	$ 2,640,174	$ 2,341,287	**$ 4,981,461**	$ 2,899,291	$ 2,571,069	**$ 5,470,360**	$ (259,117)	$ (229,782)	**$ (488,899)**	$ 259,117	$ 229,782	**$ 488,899**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 488,899	0.3%	1. Current Year Authorized 2. Current Year Authorized	1. 2022 2. 2022	1. Shift $259,117 from Customer Enrollment electric to Implementation electric. 2. Shift $229,782 from Program Admin electric and gas to Implementation gas.	1. D.21-06-015 2. D.21-06-015
Safety - Unexpected overhead costs	$ -	$ -	**$ -**	$ 93,246	$ 78,572	**$ 171,817**	$ (93,246)	$ (78,572)	**$ (171,817)**	$ 93,246	$ 78,572	**$ 171,817**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 171,817	0.1%	1. Current Year Authorized 2. Current Year Authorized	1. 2022 2. 2022	1. Shift $93,246 from Customer Enrollment electric to Safety - Unexpected Overhead Costs electric. 2. Shift $78,572 from Program Admin electric and gas to Safety Unexpected Overhead gas.	1. D.21-06-015 2. D.21-06-015
MF- SPOC	$ 418,485	$ 188,250	**$ 606,735**	$ 131,538	$ 116,647	**$ 248,185**	$ 286,947	$ 71,603	**$ 358,550**	$ -	$ -	**$ -**	$ 306,643	$ 89,069	**$ 395,712**	$ -	$ -	**$ -**	$ 395,712	0.2%	1. N/A 2. Carried Forward 3. N/A	1. N/A 2. 2021 3. N/A	1. N/A 2. Shift from 2021 to 2022 3. N/A	1. N/A 2. D.21-06-015 3. N/A
MF- Common Area Measures	$ 30,413,070	$ 17,347,343	**$ 47,760,413**	$ 2,376,762	$ 3,933,141	**$ 6,309,903**	$ 28,036,308	$ 13,414,202	**$ 41,450,510**	$ (2,685,793)	$ -	**$ (2,685,793)**	$ 18,077,670	$ 6,408,404	**$ 24,486,074**	$ -	$ -	**$ -**	$ 21,800,281	12.0%	1. Carried Forward 2. Current Year Authorized	1. 2021 2. 2022	1. Shift from 2021 to 2022. 2. Shift $2,685,793 from MF CAM electric to Enclosure gas.	1. D.21-06-015 2. D.21-06-015
MF- Leveraging-CSD LIWP	$ 2,503,978	$ 1,467,786	**$ 3,971,764**	$ 815	$ 723	**$ 1,538**	$ 2,503,163	$ 1,467,063	**$ 3,970,226**	$ (2,503,163)	$ (1,467,063)	**$ (3,970,226)**	$ 1,918,299	$ 948,410	**$ 2,866,709**	$ -	$ -	**$ -**	$ (1,103,517)	-0.6%	1. Carried Forward 2. Current Year Authorized 3. Current Year Authorized 4. Current Year Authorized 5. Current Year Authorized	1. 2021 2. 2022 3. 2022 4. 2022 5. 2022	1. Shift from 2021 to 2022 2. Shift $689,000 from Leveraging electric to MCE-LIFT electric. 3. Shift $611,000 from Leveraging gas to MCE-LIFT gas. 4. Shift $856,063 from Leveraging gas to Enclosure gas. 5. Shift $1,814,163 from Leveraging electric to Enclosure gas.	1. D.21-06-015 2. D.21-06-015 3. D.21-06-015 4. D.21-06-015 5. D.21-06-015
MF- MCE-LIFT Pilot	$ 689,000	$ 611,000	**$ 1,300,000**	$ 1,378,000	$ 1,222,000	**$ 2,600,000**	$ (689,000)	$ (611,000)	**$ (1,300,000)**	$ 689,000	$ 611,000	**$ 1,300,000**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 1,300,000	0.7%	1. Current Year Authorized 2. Current Year Authorized	1. 2022 2. 2022	1. Shift $689,000 from Leveraging electric to MCE-LIFT electric. 2. Shift $611,000 from Leveraging gas to MCE-LIFT gas.	1. D.21-06-015 2. D.21-06-015
Multi-Family Whole Building	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	N/A	N/A	N/A	N/A
Pilot Plus and Pilot Deep	$ 4,637,129	$ 4,112,170	**$ 8,749,299**	$ 481,113	$ 426,647	**$ 907,761**	$ 4,156,016	$ 3,685,523	**$ 7,841,538**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	N/A	N/A	N/A	N/A
Building Electrification	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	N/A	N/A	N/A	N/A
Clean Energy Homes	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	N/A	N/A	N/A	N/A
SASH/MASH	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	N/A	N/A	N/A	N/A
Energy Efficiency TOTAL	**$ 94,074,535**	**$ 72,294,536**	**$ 166,369,071**	**$ 40,934,506**	**$ 78,922,423**	**$ 119,856,929**	**$ 53,140,029**	**$ (6,627,887)**	**$ 46,512,142**	**$ (23,123,487)**	**$ 23,997,026**	**$ 873,539**	**$ 20,434,284**	**$ 7,562,649**	**$ 27,996,933**	**$ -**	**$ -**	**$ -**	**$ 28,870,472**	16.0%	N/A	N/A	N/A	N/A
Training Center	$ 301,343	$ 267,229	**$ 568,572**	$ 322,055	$ 285,596	**$ 607,652**	$ (20,712)	$ (18,367)	**$ (39,080)**	$ 20,712	$ 18,367	**$ 39,080**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 39,080	0.0%	1. Current Year Authorized 2. Current Year Authorized	1. 2022 2. 2022	1. Shift $20,712 from General Admin electric to Training Center electric. 2. Shift $18,367 from General Admin gas to Training Center gas.	1. D.21-06-015 2. D.21-06-015
Inspections	$ 1,538,944	$ 1,364,724	**$ 2,903,668**	$ 1,383,061	$ 1,226,488	**$ 2,609,549**	$ 155,883	$ 138,236	**$ 294,119**	$ (155,883)	$ (138,236)	**$ (294,119)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (294,119)	-0.2%	1. Current Year Authorized 2. Current Year Authorized	1. 2022 2. 2022	1. Shift $155,883 from Inspections electric to Energy Efficiency gas. 2. Shift $138,236 from Inspections gas to Energy Efficiency gas	1. D.21-06-015 2. D.21-06-015
Marketing and Outreach	$ 1,207,970	$ 1,071,218	**$ 2,279,188**	$ 1,312,389	$ 1,163,817	**$ 2,476,207**	$ (104,419)	$ (92,599)	**$ (197,019)**	$ 104,419	$ 92,599	**$ 197,019**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 197,019	0.1%	1. Current Year Authorized 2. Current Year Authorized	1. 2022 2. 2022	1. Shift $104,419 from General Admin electric to Marketing and Outreach electric. 2. Shift $92,599 from General Admin gas to Marketing and Outreach gas.	1. D.21-06-015 2. D.21-06-015
Statewide ME&O	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	N/A	N/A	N/A	N/A
M&E Studies	$ 288,209	$ 194,101	**$ 482,310**	$ 62,283	$ 55,232	**$ 117,516**	$ 225,926	$ 138,869	**$ 364,795**	$ -	$ -	**$ -**	$ 168,959	$ 88,351	**$ 257,310**	$ -	$ -	**$ -**	$ 257,310	0.1%	1. N/A 2. Carried Forward 3. N/A	1. N/A 2. 2021 3. N/A	1. N/A 2. Shift from 2021 to 2022 3. N/A	1. N/A 2. D.21-06-015 3. N/A
Regulatory Compliance	$ 306,957	$ 272,208	**$ 579,165**	$ 300,462	$ 266,447	**$ 566,910**	$ 6,495	$ 5,761	**$ 12,256**	$ (6,495)	$ (5,761)	**$ (12,256)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (12,256)	0.0%	1. Current Year Authorized 2. Current Year Authorized	1. 2022 2. 2022	1. Shift $6,495 from Regulatory Compliance electric to Energy Efficiency gas. 2. Shift $5,761 from Regulatory Compliance gas to Energy Efficiency gas.	1. D.21-06-015 2. D.21-06-015
General Administration	$ 4,100,056	$ 3,635,899	**$ 7,735,955**	$ 3,686,666	$ 3,256,989	**$ 6,943,655**	$ 413,390	$ 378,910	**$ 792,300**	$ (413,390)	$ (378,910)	**$ (792,300)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (792,300)	-0.4%	1. Current Year Authorized 2. Current Year Authorized 3. Current Year Authorized 4. Current Year Authorized	1. 2022 2. 2022 3. 2022 4. 2022	1. Shift $125,132 from General Admin electric to Training Center electric, and Marketing and Outreach electric. 2. Shift $110,966 from General Admin gas to Training Center gas, and Marketing and Outreach gas. 3. Shift $288,258 from General Admin electric to Energy Efficiency gas. 4. Shift $267,944 from General Admin gas to Energy Efficiency gas.	1. D.21-06-015 2. D.21-06-015 3. D.21-06-015 4. D.21-06-015
CPUC Energy Division	$ 32,798	$ 29,085	**$ 61,883**	$ 26,988	$ 23,933	**$ 50,921**	$ 5,810	$ 5,152	**$ 10,962**	$ (5,810)	$ (5,152)	**$ (10,962)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (10,962)	0.0%	1. Current Year Authorized 2. Current Year Authorized	1. 2022 2. 2022	1. Shift $5,810 from CPUC Energy Division electric to Energy Efficiency gas. 2. Shift $5,152 from CPUC Energy Division gas to Energy Efficiency gas	1. D.21-06-015 2. D.21-06-015
TOTAL PROGRAM COSTS	**$ 101,850,812**	**$ 79,129,000**	**$ 180,979,812**	**$ 48,028,412**	**$ 85,200,926**	**$ 133,229,337**	**$ 53,822,401**	**$ (6,071,925)**	**$ 47,750,475**	**$ (23,579,933)**	**$ 23,579,933**	**$ 0**	**$ 20,603,243**	**$ 7,651,000**	**$ 28,254,243**	**$ -**	**$ -**	**$ -**	**$ 28,254,243**	**15.6%**	-	-	-	-
Carryforward from 2022 and prior years [3]	$ 30,242,468	$ 17,508,008	$ 47,750,475	$ -	$ -	$ -	$ 30,242,468	$ 17,508,008	$ 47,750,475	$ -	$ -	$ -	$ 30,242,468	$ 17,508,008	$ 47,750,475	$ -	$ -	$ -	$ -					
Approved Budget for Unspent Funds in 2022			$ -			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -					
TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	**$ 132,093,280**	**$ 96,637,008**	**$ 228,730,288**	**$ 48,028,412**	**$ 85,200,926**	**$ 133,229,337**	**$ 84,064,868**	**$ 11,436,082**	**$ 95,500,951**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**					

[1] Shift a total of $2,015,050 from electric budget categories to electric budget categories. Shift a total of $4,418,911 from gas budget categories to gas budget categories. Shift a total of $23,579,933 from electric budget categories to gas budget categories.
[2] Carried forward a total of $28,254,243 from 2021 to 2023. Carried forward budget categories include Pilot, Studies, MF SPOC, MF CAM, and CSD Leveraging.
[3] Carry forward a total of $47,750,475 from 2022 to 2023. Carry forward budget categories include Pilot, Studies, MF SPOC, MF CAM, Pilot Plus and Pilot Deep.

ESA Table 13 - ESA Categorical and Other Enrollment
Pacific Gas and Electric Company
Program Year 2022 Annual Report

ESA Main (SF, MH, MF In-Unit) [1]	
Type of Enrollment	**Number of Homes Treated**
Women, Infants, and Children Program (WIC)	3,629
Supplemental Security Income (SSI)	3,270
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	4,067
CalWORKs/Temporary Assistance for Needy Families (TANF) or Tribal TANF	141
Tribal TANF	Combined with TANF
Medicaid/Medi-Cal for Families	11,017
Healthy Families A&B	5,846
National School Lunch Program (NSLP) - Free Lunch	464
Low-income Home Energy Assistance Program (LIHEAP)	1,400
Bureau of Indian Affairs General Assistance	3
Head Start Income Eligible - (Tribal Only)	5
CARE Income Certified	1,580
80/20 Rule [2]	3,104
Targeted Self Certification	2,467
Multiple Categorical Programs	1,761
Standard Enrollment	28,813
Total	**67,567**

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit).

[2] Pursuant to D.01-03-028 OP 3(a) which is applicable to master-metered as well as individual metered homes which allows treatment of property when 80% of tenants are income qualified for ESA Program.

ESA MF CAM	
Type of Enrollment	**Number of Homes Treated**
Women, Infants, and Children Program (WIC)	N/A
Supplemental Security Income (SSI)	N/A
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	N/A
CalWORKs/Temporary Assistance for Needy Families (TANF)	N/A
Tribal TANF	N/A
Medicaid/Medi-Cal for Families	N/A
Healthy Families A&B	N/A
National School Lunch Program (NSLP) - Free Lunch	N/A
Low-income Home Energy Assistance Program (LIHEAP)	N/A
Bureau of Indian Affairs General Assistance	N/A
Head Start Income Eligible - (Tribal Only)	N/A
CARE Income Certified	N/A
80/20 Rule	N/A
Targeted Self Certification	N/A
Multiple Programs	N/A
Standard Enrollment	N/A
Total	**-**

ESA Pilot Plus and Pilot Deep [3]	
Type of Enrollment	**Number of Homes Treated**
Women, Infants, and Children Program (WIC)	-
Supplemental Security Income (SSI)	-
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	-
CalWORKs/Temporary Assistance for Needy Families (TANF)	-
Tribal TANF	-
Medicaid/Medi-Cal for Families	-
Healthy Families A&B	-
National School Lunch Program (NSLP) - Free Lunch	-
Low-income Home Energy Assistance Program (LIHEAP)	-
Bureau of Indian Affairs General Assistance	-
Head Start Income Eligible - (Tribal Only)	-
CARE Income Certified	-
80/20 Rule	-
Targeted Self Certification	-
Standard Enrollment	-
Total	**-**

[3] PG&E did not complete Pilot Plus/Deep projects in 2022.

ESA Building Electrification (SCE Only)	
Type of Enrollment	**Number of Homes Treated**
Women, Infants, and Children Program (WIC)	-
Supplemental Security Income (SSI)	-
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	-
CalWORKs/Temporary Assistance for Needy Families (TANF)	-
Tribal TANF	-
Medicaid/Medi-Cal for Families	-
Healthy Families A&B	-
National School Lunch Program (NSLP) - Free Lunch	-
Low-income Home Energy Assistance Program (LIHEAP)	-
Bureau of Indian Affairs General Assistance	-
Head Start Income Eligible - (Tribal Only)	-
CARE Income Certified	-
80/20 Rule	-
Targeted Self Certification	-
Standard Enrollment	-
Total	**-**

Note:
*Categorical enrollment is not applicable to MFWB or Clean Energy Homes.

ESA Table 14 - ESA Leveraging & Integration [1] [6]
Pacific Gas and Electric Company
Program Year 2022 Annual Report

ESA Main (SF, MH, MF In-Unit) [1]

Partner	Brief Description of Effort	Relationship outside of the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
Self Help Home Improvement Project (SHHIP)	Coordination with LIHEAP and Redding Electric Utility (REU)	Yes	Yes	$ 43,794	Unknown	unknown	32	Installation contractor provided dollars saved	N	Unknown amount of energy savings.
GRID Alternatives	Coordination with the Single-family Affordable Solar Homes Program Administrator, current GRID Alternatives, on referrals and homes treated.	Yes	Unknown	Unknown	Unknown	Unknown	295	Unknown	N	Unknown amount of energy savings
Residential Newsletter	As part of the Residential Integrated Campaign, the Residential Newsletter promoted the ESA program to 1.6M income-qualified customers with medium to high energy bills in 2022.	No	No	N/A	N/A	N/A	Unknown	N/A	N/A	Unknown amount of energy or dollar savings
ESA Water-Energy Coordination Program	This purpose of this effort is to allow ESA contractors to offer water conservation measures while they treat ESA customers. Water Agencies select from a standardized menu of options that can include replacing toilets, leak detection, meter checks, etc. Water offerings are paid by each participating Water Agency.	Yes	Yes	Unknown	~ 12,117 kWh/year ~ 9,080,000 million gallons of water/year	TBD	507 homes received water measures in 2022	CPUC Water / Energy Calculator documented in the Water Energy Nexus workpaper	N	Unknown amount of dollars saved.

MF CAM and MFWB

Partner	Brief Description of Effort	Relationship outside of the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
Advanced Energy Build	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	1	N/A	N/A	
3C-REN Multifamily Home Energy Savings	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Air District Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
BAAQMD Charge! Program	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
BayREN BAMBE	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	19	N/A	N/A	
BayREN Home	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
BUILD	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	4	N/A	N/A	
CEDA	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Comfortable Homes Program	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Demand Management Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Energy Star Rebate Finder	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Energy Smart Homes	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	5	N/A	N/A	
ESA MF CAM	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	16	N/A	N/A	
ESA Main	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	5	N/A	N/A	
GoGreen Financing,	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
LIHEAP	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
LIWP	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	6	N/A	N/A	
MCE MFES and LIFT programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	1	N/A	N/A	
MESP	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	2	N/A	N/A	
Non PG&E EV Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	1	N/A	N/A	
OBF	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	1	N/A	N/A	
Other Utility SPOC	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
PACE	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
PG&E EV Progrms,	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
PG&E Market Place	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
RAHP	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Rebate Catalogue	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SCE Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SCG Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SDG&E Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SGIP	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	1	N/A	N/A	
Smart Energy Line	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SMUD Multifamily	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	3	N/A	N/A	
SMUD Neighborhood Solarshares	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SMUD Smart Homes	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	1	N/A	N/A	
SOMAH	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	1	N/A	N/A	
TECH	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	1	N/A	N/A	
TID Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Water District Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	

ESA Pilot Plus and Pilot Deep [6]

Partner	Brief Description of Effort	Relationship outside of the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
-	-	-	-	-	-	-	-	-	-	-

ESA Building Electrification (SCE Only)

Partner	Brief Description of Effort	Relationship outside of the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-

ESA Clean Energy Homes (SCE Only)

Partner	Brief Description of Effort	Relationship outside of the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-

[1] Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.
[2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).
[3] Annual Energy savings/benefits for measures installation in 2021. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.
[4] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.
[5] In footnotes, provide information on methodology used to calculate cost and/or resource savings.
[6] As of the end of 2022, PG&E and its Pilot Implementer had not formalized any partnerships for leveraging and integration.

Notes:
*Summary data includes ESA Main Program (SF, MH, MF-In-Unit), Pilot Plus and Pilot Deep, MF CAM, Building Electrification, and Clean Energy Homes. MFWB implementation to occur no earlier than January 2023.
**Fields not applicable to specific efforts are marked "N/A".

ESA Table 14A - ESA Clean Energy Referral, Leveraging, and Coordination
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Partner	Brief Description of Effort	# of Referrals [1]	# of Leveraging [2]	# of Coordination Efforts [3]	# of Leads [4]	# of Enrollments from Successful Leads [5]
LIHEAP	When a home does not qualify for R&R measures in ESA, contractors connect the customer to LIHEAP contractors.	142	250	-	1,699	784
DAC-SASH	Coordination with the DAC Single-family Affordable Solar Homes Program Administrator, GRID Alternatives, on referrals and homes treated.	N/A	N/A	N/A	653	295
ESA Water-Energy Coordination Program	Allows ESA contractors to offer water conservation measures while they treat ESA customers. Water Agencies select from a standardized menu of options that can include replacing toilets, leak detection, meter checks, etc. Water offerings are paid by each participating Water Agency.	N/A	N/A	10	N/A	507
REACH	REACH provides an energy credit for up to $300 based on the past due bill (energy credit support is subject to funding availability). A non-profit organization runs the REACH program from 170 offices in Northern and Central California.	14	N/A	N/A	N/A	N/A
SmartAC Program	SmartAC is a voluntary program that helps prevent power interruptions. It encourages customer participation by providing incentives and instant rebates for purchasing an eligible smart thermostat.	14,625	N/A	6,248	N/A	N/A
SoCal Gas ESA	When a home is has PGE Electric Only and gas service is through SoCal Gas, contractors connect the customer to SoCal Gas ESA for additional assistance w/ ESA measures.	52	6	67	21	12
SJV DAC	Residential Electrification in three communities in the San Joaquin Valley: Allensworth, Cantua Creek, and Seville. Customer's eligible for this service, ESA contractor will enroll customer in SJV DAC and once home is fully converted will also enroll through PGE ESA to receive additional ESA measures not offered through this program.	66	34	-	170	38
SMUD	ESA Subcontractor provides customer with contact information for SMUD for possible assistance.	5	N/A	N/A	N/A	N/A

[1] # of referral includes leads provided to a Partner Program by ESA.
[2] # of leveraging accounts for households that have received treatments by both ESA and the Partner Program where there were shared resources/cost, such as Direct Tech, CSD, Water Energy, Refrigerator, etc..
[3] # of coordination efforts include joint marketing activities by ESA and its Partner Program. These joint marketing activities may include social media, leave behinds, customer outreach events and activities..
[4] # of customer leads provided to ESA by Partner Program.
[5] This includes customer leads that result in actual ESA enrollments/treatment. It does not include leads that are in the intake process or have been treated in prior years.

Notes:
*PG&E is currently updating its system to capture information required for this reporting. PG&E expects to begin reporting on these metrics in full starting in 2023.
*PG&E is currently compiling this data for this reporting period.

ESA Table 15 - ESA Expenditures for Pilots and Studies
Pacific Gas and Electric Company
Program Year 2022 Annual Report

	Authorized 2021-26 Funding			2022 Expenses			Cycle to Date Expenses			% of Budget Expensed		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots												
Virual Energy Coach (PG&E only)	$689,000	$611,000	$1,300,000	$80,858	$71,704	$152,563	$121,436	$107,688	$229,125	18%	18%	18%
ESA Pilot Plus and Pilot Deep	$23,273,909	$20,639,127	$43,913,036	$481,113	$426,647	$907,761	$498,766	$442,302	$941,069	2%	2%	2%
Total Pilots	**$23,962,909**	**$21,250,127**	**$45,213,036**	**$561,971**	**$498,352**	**$1,060,323**	**$620,202**	**$549,991**	**$1,170,193**	**3%**	**3%**	**3%**
Studies [1]												
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study [2]	$ 52,125	$ 22,875	$ 75,000	$ 22,120	$ 19,616	$ 41,736	$ 41,926	$ 32,504	$ 74,430	80%	142%	99%
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study [3]	$ 39,750	$ 35,250	$ 75,000	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study [3]	$ 39,750	$ 35,250	$ 75,000	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Joint IOU - Statewide CARE-ESA Categorical Study [4]	$ 11,925	$ 10,575	$ 22,500	$ 13,067	$ 11,587	$ 24,654	$ 13,067	$ 11,587	$ 24,654	110%	110%	110%
Load Impact Evaluation Study [5]	$ 238,500	$ 211,500	$ 450,000	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Equity Criteria and Non Energy Benefits (NEBs) Evaluation [5]	$ 79,500	$ 70,500	$ 150,000	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Rapid Feedback Research and Analysis [6]	$ 159,000	$ 141,000	$ 300,000	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Joint IOU - Multi-Family CAM Process Evaluation [7]	$ 62,550	$ 27,450	$ 90,000	$ 27,096	$ 24,029	$ 51,125	$ 42,940	$ 38,080	$ 81,020	69%	139%	90%
Joint IOU - Process Evaluation Studies (1-4 Studies) [5]	$ 79,500	$ 70,500	$ 150,000	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Total Studies	**$762,600**	**$624,900**	**$1,387,500**	**$62,283**	**$55,232**	**$117,516**	**$97,933**	**$82,171**	**$180,104**	**13%**	**13%**	**13%**

[1] Authorized per D.21-06-015. Funds for pilots and studies may be rolled over to the next program year or borrowed from a future program year within the cycle, to allow for flexibility in scheduling changes with these efforts. Funding for studies is not solely supported via the ESA program budget; some studies are jointly supported via the CARE budget. Funding amounts listed reflect PG&E's 30% allocation among the IOUs, except for PG&E-only studies including the "Rapid Feedback Research and Analysis". Final authorized budgets may be adjusted by the ESA/CARE Studies Working Group per D.21-06-015.

[2] PG&E's Advice Letter 4193-G/5718-E approved Joint Utilities' 2022 LINA Study for $500,000. SCE holds the statewide contract for this co-funded study. PG&E's 30% allocation is $150,000, funded 50/50 via the ESA and CARE budgets. The 2022 LINA commenced in January 2021, and was completed in December 2022. The Joint Utilities would carry over committed, unspent 2021 LINA funding forward to 2022 and until the study is completed.

[3] Authorized per D.21-06-015, the 2025 and 2028 Low Income Needs Assessment (LINA) are required to be completed by Dec 2025 and Dec 2028, respectively.

[4] Authorized per D.21-06-015, the Categorical Study is funded 50/50 via the ESA and CARE budgets.

[5] Authorized per D.21-06-015, to be conducted during PY 2023-26.

[6] Authorized per D.21-06-015, for each IOU to use for IOU-specific studies as needed. Unused annual budget may be carried forward until the end of the cycle.

[7] PG&E's Advice Letter 4349-G/6030-E was approved on January 21, 2021, and authorized $90,000 shift from MF-CAM Adminstration to Studies for the MF CAM Process Evaluation; funding source is 100% ESA. PG&E holds the statewide contract for this co-funded study. The study commenced in August 2021 and was completed in October 2022. The Joint Utilities will carry over committed, unspent 2021 funding forward to 2022 and until the study is completed.

	A	B	C
1	**ESA Table 16 - Tribal Outreach [1]** **Pacific Gas and Electric Company** **Program Year 2022 Annual Report**		
2			
3			
4			
5	**OUTREACH STATUS**	**Quantity (Includes CARE, FERA, and ESA)**	**List of Participating Tribes**
6	Tribes completed ESA Meet & Confer	9	Blue Lake Rancheria, Cloverdale Rancheria, Hoopa Valley Rancheria, Ione Band of Miwok Indians, Karuk Tribe, Robinson Rancheria, Scotts Valley Band of Pomo, Sherwood Valley Rancheria of Pomo Indians, and Tejon Indian Tribe.
7	Tribes requested outreach materials or applications	1	Sherwood Valley Rancheria of Pomo Indians
8	Tribes who have not accepted offer to Meet and Confer	0	N/A
9	Tribes and Housing Authority sites involved in Focused Project/ESA	1	Tejon Indian Tribe
10	Partnership offer on Tribal Lands	102	**(Federally-Recognized Tribes)** Bear River Band of the Rohnerville Rancheria, Big Lagoon Rancheria, Big Sandy Rancheria, Big Valley Band Rancheria, Blue Lake Rancheria, Buena Vista Rancheria of Mi-Wuk Indians, Cachil DeHe Band of Wintun Indians of the Colusa Indian Community, Cahto Tribe (Laytonville), California Valley Miwok Tribe, Chicken Ranch Rancheria, Cloverdale Rancheria of Pomo Indians of California, Cold Springs Rancheria, Cortina Rancheria, Coyote Valley Band of Pomo Indians, Dry Creek Rancheria of Pomo Indians, Elem Indian Colony, Enterprise Rancheria, Federated Indians of Graton Rancheria, Greenville Rancheria, Grindstone Indian Rancheria, Guidiville Indian Rancheria, Habematolel Pomo of Upper Lake, Hoopa Valley Tribe, Hopland Band of Pomo Indians, Ione Band of Miwok Indians of California, Jackson band of Mi-Wuk Indians, Kashia Band of Pomo Indians of the Stewart's Point Rancheria, Karuk Tribe, Lower Lake (Koi Tribe), Lytton Rancheria of California, Manchester Band of Pomo Indians, Mechoopda Indian Tribe, Middletown Rancheria of Pomo Indians, Mooretown Rancheria, North Fork Rancheria, Paskenta Band of Nomlaki Indians, Picayune Rancheria of Chukchansi Indians, Pinoleville Pomo Nation, Pit River Tribe, Potter Valley Tribe, Redding Rancheria, Redwood Valley, Little River Band of Rancheria of Pomo, Robinson Rancheria, Round Valley Reservation, Santa Ynez Band of Chumash Mission Indians, Scotts Valley Band of Pomo Indians, Sherwood Valley Rancheria, Shingle Springs Band of Miwok Indians, Susanville Indian Rancheria, Table Mountain Rancheria, Tachi-Yokut Tribe (Santa Rosa Rancheria, Leemore, CA), Tejon Indian Tribe, Trinidad Rancheria, Tule River Indian Reservation, Tuolumne Band of Me-Wuk Indians, Tyme Maidu Tribe-Berry Creek Reservation, United Auburn Indian Community, Wilton Rancheria, Wiyot Tribe, Washoe Tribe of CA and NV, Yocha Dehe Wintun Nation, Yurok Tribe. **(Non-Federally Recognized Tribes):** Amah Mutsun Tribal Band, American Indian Council of Mariposa County (Southern Sierra Miwuk Nation), Butte Tribal Council, Calaveras Band of Mi-Wuk Indians, California Choinumni Tribal Project, Chaushila Yokuts, Coastal Band of the Chumash Nation, Coastanoan Ohlone Rumsen-Mutsen Tribe, Dumna Wo-Wah Tribal Government, Dunlap Band of Mono Indians, Dunlap Band of Mono Indians Historical Preservation Society, Haslett Basin Traditional Committee, Honey Lake Maidu, Indian Canyon Mutsun Band of Costanoan, Kern Valley Indian Council, Kawaiisu Tribe. Kings River Choinumni Farm Tribe, Mishewal-Wappo Tribe of Alexander Valley, Muwekma Ohlone Indian Tribe, Nor-Rel-Muk Nation, North Fork Mono Tribe, Northern Band of Mono Yokuts, Noyo River Indian Community, Ohlone Indian Tribe, Salinan Tribe of Monterey San Luis Obispo and San Benito Counties, San Luis Obispo County Chumash Council, Shelbelna Band of Mendocino Coast Pomo Indians, Sierra Mono Museum, Strawberry Valley Rancheria, The Mono Nation, Traditional Choinumni Tribe (East of Kings River), Trina Marine Ruano Family, Tsungwe Council, Tubatulabal Tribe, Wailaki Tribe, Winnemem Wintu Tribe, Wintu Tribe of Northern California, Wukchumni Tribal Council, Wuksachi Indian Tribe, and Xolon Salinan Tribe.
11	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 Offices:** Bear River Band of Rohnerville Rancheria, Berry Creek Rancheria, Big Sandy Rancheria, Big Valley Rancheria, Cher-Ae Heights Indian Community of The Trinidad Rancheria, Cloverdale Rancheria, Dry Creek Rancheria, Elem Indian Colony, Enterprise Rancheria of Maidu Indians, Federated Indians of Graton Rancheria, Fort Independence Reservation, Greenville Rancheria, Hoopa Valley Tribe, Ione Band of Miwok Indians, Karuk Tribe, Laytonville Rancheria, North Fork Rancheria, Picayune Rancheria, Pinoleville Reservation, Pit River Tribes, Round Valley Reservation, Santa Rosa Rancheria Tachi-Yokut, Stewarts Point Rancheria (Kashaya Pomo), Susanville Indian Rancheria, Tejon Indian Tribe, Tule River Indian Tribe, Upper Lake Rancheria, Washoe Tribe, Wilton Rancheria, and Yurok Tribe. **TANF Offices:** California Department of Social Services CALWORKS and Family Resilience Branch, Federated Indians of Graton Rancheria, Hoopa Valley Tribe, Karuk Tribe, North Fork Rancheria, Susanville Indian Rancheria, Tuolumne Rancheria, and Owens Valley Career Development Center.
12	Housing Authority and TANF offices who participated in Meet and Confer	4	Hoopa Valley Housing Authority, Hoopa Valley TANF Office, North Fork Rancheria Housing Authority, and Wilton Rancheria Housing Authority
13	[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), Pilot Plus and Pilot Deep, MF CAM, and CSD Leveraging.		

ESA Table 17 - ESA Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions*
Pacific Gas and Electric Company
Program Year 2022 Annual Report

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) [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	Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh) [21]	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms) [21]
Demographic													
Housing Type													
SF	1,213,009	52,566	4%	106,760	49%	406.64	407.75	0.09	19.11	19.84	$ 1,302	0.06416	0.05026
MH	117,468	5,547	5%	10,457	53%	319.65	319.75	0.09	13.55	14.23	$ 1,172	0.00103	0.00109
MF In-Unit	491,864	9,454	2%	24,512	39%	206.70	206.70	0.02	10.16	10.18	$ 692	0.00432	0.00220
Rent vs. Own			**0%**		**0%**								
Own	722,005	39,397	5%	78,152	50%	421.96	423.00	0.11	20.63	21.68	$ 1,471	0.01112	0.01445
Rent	1,100,330	28,170	3%	65,177	43%	301.00	301.62	0.05	12.88	12.92	$ 836	0.01473	0.01063
Previous vs. New Participant													
New	1,440,864	59,315	0%	64,035	0%	353.95	354.64	0.08	17.70	18.19	$ 1,156	0.01066	0.01172
Previous	381,476	8,252	0%	8,506	0%	497.84	500.02	0.11	15.27	16.84	$ 1,569	0.02701	0.03219
Seniors [6]	756,944	29,238	4%	29,861	98%	365.07	365.67	0.09	17.35	18.04	$ 1,244	0.00753	0.00735
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	0.01542	0.01389
Vulnerable [8]	687,389	35,637	5%	39,845	89%	331.04	332.31	0.08	17.64	18.15	$ 1,161	0.01331	0.01736
Location													
DAC	562,067	16,559	3%	16,797	99%	335.43	337.06	0.08	18.13	18.96	$ 1,302	0.01742	0.02736
Rural	367,782	13,881	4%	28,337	49%	362.83	364.06	0.09	15.85	16.39	$ 1,164	0.01764	0.00632
Tribal [20]	1,967	2	0%	3	67%	545.13	545.13	0.07	3.82	3.82	$ 2,195	0.07372	0.01739
PSPS Zone	222,332	6,079	3%	6,929	88%	375.35	375.41	0.07	12.98	13.22	$ 939	0.00805	0.00439
Wildfire Zone [9]	82,444	438	1%	474	92%	334.65	334.65	0.04	3.57	3.63	$ 536	0.03659	0.00606
Climate Zone 1 (PG&E)	28,937	355	1%	1,551	23%	328.13	328.13	0.09	13.77	14.18	$ 1,169	0.00613	0.00042
Climate Zone 2 (PG&E)	115,486	3,177	3%	9,001	35%	285.41	285.41	0.05	12.20	12.46	$ 862	0.00288	0.00255
Climate Zone 3 (PG&E)	425,730	16,438	4%	36,185	45%	271.89	271.89	0.03	11.43	11.91	$ 776	0.01125	0.00618
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	0.00562	0.02335
Climate Zone 5 (PG&E)	43,176	2,150	5%	4,845	44%	439.92	439.92	0.03	-0.86	-0.86	$ 518	0.01021	-0.00180
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	0.00237	0.00362
Climate Zone 12 (PG&E)	573,718	17,379	3%	56,206	31%	480.47	480.96	0.12	24.76	25.39	$ 1,514	0.02985	0.02743
Climate Zone 13 (PG&E)	299,175	20,467	7%	51,805	40%	374.98	377.40	0.09	19.11	20.04	$ 1,437	0.02082	0.05163
Climate Zone 14 (PG&E)	5,991	3	0%	293	1%	187.95	187.95	0.06	8.51	16.65	$ 2,129	0.02534	0.03020
Climate Zone 16 (PG&E)	19,146	136	1%	852	16%	465.99	466.76	0.05	1.48	1.66	$ 663	0.04749	0.00206
CARB Communities [10]	174,113	9,672	6%	10,458	92%	290.49	291.89	0.05	13.19	13.70	$ 911	0.01338	0.01585
Financial													
CARE	1,401,702	61,718	4%	56,701	109%	375.98	376.84	0.08	17.43	18.06	$ 1,214	0.01159	0.01308
FERA	174,219	483	0%	624	77%	424.70	425.89	0.09	20.64	21.40	$ 1,327	0.01389	0.05510
Disconnected [11]	-	-	-	-	0%	-	-	-	-	-	$ -	-	-
Arrearages [12]	554,495	20,167	4%	20,685	97%	349.41	350.19	0.07	17.02	17.42	$ 1,084	0.02569	0.01449
High Usage [13]	31,649	14,624	46%	14,973	98%	378.06	379.25	0.08	17.53	18.33	$ 1,254	0.01286	0.00925
High Energy Burden [14]	1,075,439	36,828	3%	56,500	65%	344.51	345.37	0.07	17.06	17.49	$ 1,098	0.01218	0.01529
SEVI [15]													
H	602,765	31,499	0%	35,066	0%	346.14	346.98	0.07	17.12	17.53	$ 1,102	0.01268	0.01481
M	830,254	24,918	0%	43,259	0%	346.03	346.89	0.07	17.07	17.52	$ 1,103	0.01287	0.01557
L	388,211	7,787	0%	8,639	0%	342.67	343.16	0.07	16.92	17.37	$ 1,095	0.01382	0.01596
Affordability Ratio [16]	233,227	13,929	6%	15,304	91%	296.27	298.40	0.07	16.98	17.60	$ 1,158	0.00592	0.03269
Health Condition													
Medical Baseline	124,753	8,789	7%	8,718	101%	405.27	405.97	0.10	18.01	18.71	$ 1,332	0.00244	0.00327
Respiratory (Asthma) [17]													
H	928,252	41,957	0%	62,130	0%	346.66	347.55	0.07	17.08	17.52	$ 1,106	0.01275	0.01541
M	543,596	16,369	0%	18,276	0%	343.03	343.73	0.07	17.01	17.42	$ 1,087	0.01306	0.01431
L	350,522	5,878	0%	6,558	0%	345.98	346.46	0.08	17.26	17.71	$ 1,107	0.01318	0.01662
Disabled	630,364	17,898	3%	18,261	98%	386.28	387.01	0.09	18.20	18.83	$ 1,293	0.00688	0.00907

[*] PG&E is reporting on these customer segments at the direction of the Energy Division with the caveat that estimates/numbers may be compiled from multiple sources, based on available estimates, and/or self-reported data. The numbers may not be additive.

[1] The estimates for eligible households will be provided based on the 250% Federal Poverty Guidelines where applicable.

[2] Households treated data is not additive because customers may be represented in multiple categories. Data is compiled based on ESA measures received YTD, and may include enrollments from prior years.

[3] The number of household contacted includes YTD leads and enrollments.

[4] PG&E has considered the energy savings associated with all ESA measures installed for this entry, regardless of whether the savings have a negative or positive value for kW, kWh, and/or Therms. Many measures offered in ESA provide Non-Energy Benefits (including Health, Comfort, and Safety (HCS)) in addition to energy savings, and some of these measures may be associated with a negative savings value.

[5] PG&E has considered only the energy savings associated with the ESA measures installed for this entry that have a positive value for kWh and/or Therms. Installed ESA measures with a negative savings value for both kWh and Therms were excluded.

[6] This represents the number of households with at least one member who is at least 60 years old at the time of data collection.

[7] "Hard-to-reach" residential customers include "those customers who do not have easy access to program information or generally do not participate in energy efficiency programs due to a language, income, housing type, geographic, or home ownership (split incentives) barrier" (Advice Letter 4482-G/6314-E dated September 1, 2021). For the purpose of this reporting, PG&E is defining 'hard-to-reach" as those residential customer self-identified as not preferring or speaking English as the primary language because income, housing type, geographic, and homeownership information is reported elsewhere on this table.

[8] Vulnerable refers to Disadvantaged Vulnerable Communities (DVC) which consist consists of communities in the 25% highest scoring census tracts according to the most current versions of the California Communities Environmental Health Screening Tool (CalEnviroScreen), as well as all California tribal lands, census tracts that score in the highest 5% of Pollution Burden within CalEnviroScreen, but do not receive an overall CalEnviroScreen score due to unreliable public health and socioeconomic data, and census tracts with median household incomes less than 60% of state median income.

[9] Includes Zone 3 (Tier 3) of the CPUC Fire-Threat Map

[10] This reflects communities within PG&E's service territory that are identified by the California Air Resources Board (CARB) Community Air Protection Program as communities continue to experience environmental and health inequities from air pollution.

[11] Rates are based on the previous year. PG&E did not perform any disconnections in 2021.

[12] PG&E defines arrearages as overdue balance greater than 30 days. Estimated eligibility is based on CARE/FERA households with arrearages in the prior year as reported in PG&E's R.18-07-015 Monthly Disconnection Report through December 2022.

[13] PG&E defines high usage as at least 400% of baseline at least three times in 12-month period.

[14] PG&E utilizes the Low-Income Energy Affordability Data (LEAD) Tool developed DOE's Office of Energy Efficiency & Renewable Energy to identify census tracts with high energy burden for households at below 200 % Federal Poverty Level (FPL) that are in PG&E's service territory. The 2016 Needs Assessment for the Energy Savings Assistance and the California Alternate Rates for Energy Programs describes households that spent more 6.3% of their annual income on energy bills as having high energy burden (p.47).

[15] The Socioeconomic Vulnerability Index (SEVI) metric represents the relative socioeconomic standing of census tracts, referred to as communities, in terms of poverty, unemployment, educational attainment, linguistic isolation, and percentage of income spent on housing. PG&E utilizes the SEVI data provided by the CPUC to map its service territory by SEVI scores (L: 0 to 33; M: >33 to 66; H: >66).

[16] The Affordability Ratio (AR) metric quantifies the percentage of a representative household's income that would be used to pay for an essential utility service after non-discretionary expenses such as housing and other essential utility service charges are deducted from the household's income. Using Gas AR20 and Electric AR20 data for 2022 (using 2019 base year) provided by the CPUC, PG&E selects census tracts with Electric AR20 at above 15% or Gas AR20 above 10% to identify areas within its service territory as having high affordability ratio (CPUC 2019 Annual Affordability Report, pp 34, 44).

[17] PG&E utilizes the 'Asthmas' indicator in CalEnviroScreen 4.0 (published by the California Office of Environmental Health Hazard Assessment) as a proxy to identify locations with varying levels of respiratory conditions within its service territory. L: 0-33 percentile; M: >33-66 percentile; L: >66-100 percentile.

[18] PG&E is currently updating its form/system to begin data collection for this segment.

[19] Rate of Uptake may be greater than 100% as homes that have received treatment this year may have been enrolled/contacted in the prior year.

[20] Currently, this data only captures tribal households located on federally-recognized tribes whose trust lands are identified in the Bureau of Indian Affairs. This data currently does not include ESA participants from non federally-recognized tribes or households that self-identified as Native American. PG&E plans to incorporate self-reported information in this reporting in the future.

[21] In alignment with SCE, PG&E is using the average total annual energy use (in kWh or Therms) as the denominator in Column M and Column N, respectively.

Note:
The MF In-unit will be tracked with ESA main program until MFWB program launches. Upon MFWB program launch, the data for MF In-Unit and MF CAM will be captured in the MFWB section.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
89														
90	**ESA MFWB**													
91	**Customer Segments**	**# of Properties Eligible**	**# of Properties Treated**	**Enrollment Rate = (C/B)**	**# of Properties Contacted**	**Rate of Uptake = (C/E)**	**Avg. Energy Savings (kWh) Per Treated Properties (Energy Saving and HCS Measures)**	**Avg. Energy Savings (kWh) Per Treated Properties (Energy Saving Measures only)**	**Avg. Peak Demand Savings (kW) Per Treated Properties**	**Avg. Energy Savings (Therms) Per Treated Properties (Energy Saving and HCS Measures)**	**Avg. Energy Savings (Therms) Per Treated Properties (Energy Saving Measures only)**	**Avg. Cost Per Treated Properties**	**Avg. Properties Energy Savings (kWh) / Total Annual Energy Use (kWh)**	**Avg. Properties Energy Savings (Therms) / Total Annual Energy Use (Therms)**
92	**Demographic**													
93	**Housing Type**													
94	SF	-	-	0%	-	0%	-	-	-	-	-	-	-	-
95	MH	-	-	0%	-	0%	-	-	-	-	-	-	-	-
96	MF In-Unit	-	-	0%	-	0%	-	-	-	-	-	-	-	-
97	**Rent vs. Own**													
98	Own	-	-	0%	-	0%	-	-	-	-	-	-	-	-
99	Rent	-	-	0%	-	0%	-	-	-	-	-	-	-	-
100	**Previous vs. New Participant**													
101	Seniors	-	-	0%	-	0%	-	-	-	-	-	-	-	-
102	Veterans	-	-	0%	-	0%	-	-	-	-	-	-	-	-
103	Hard-to-Reach	-	-	0%	-	0%	-	-	-	-	-	-	-	-
104	Vulnerable	-	-	0%	-	0%	-	-	-	-	-	-	-	-
105	**Location**													
106	DAC	-	-	0%	-	0%	-	-	-	-	-	-	-	-
107	Rural	-	-	0%	-	0%	-	-	-	-	-	-	-	-
108	Tribal	-	-	0%	-	0%	-	-	-	-	-	-	-	-
109	PSPS Zone	-	-	0%	-	0%	-	-	-	-	-	-	-	-
110	Wildfire Zone	-	-	0%	-	0%	-	-	-	-	-	-	-	-
111	Climate Zone 7 (example)	-	-	0%	-	0%	-	-	-	-	-	-	-	-
112	Climate Zone 10 (example)	-	-	0%	-	0%	-	-	-	-	-	-	-	-
113	Climate Zone 14 (example)	-	-	0%	-	0%	-	-	-	-	-	-	-	-
114	Climate Zone 15 (example)	-	-	0%	-	0%	-	-	-	-	-	-	-	-
115	CARB Communities	-	-	0%	-	0%	-	-	-	-	-	-	-	-
116	**Financial**													
117	CARE	-	-	0%	-	0%	-	-	-	-	-	-	-	-
118	Disconnected	-	-	0%	-	0%	-	-	-	-	-	-	-	-
119	Arrearages	-	-	0%	-	0%	-	-	-	-	-	-	-	-
120	High Usage	-	-	0%	-	0%	-	-	-	-	-	-	-	-
121	High Energy Burden	-	-	0%	-	0%	-	-	-	-	-	-	-	-
122	SEVI	-	-	0%	-	0%	-	-	-	-	-	-	-	-
123	Affordability Ratio	-	-	0%	-	0%	-	-	-	-	-	-	-	-
124	**Health Condition**													
125	Medical Baseline	-	-	0%	-	0%	-	-	-	-	-	-	-	-
126	Respiratory	-	-	0%	-	0%	-	-	-	-	-	-	-	-
127	Disabled	-	-	0%	-	0%	-	-	-	-	-	-	-	-
128	**Note:**													
129	*ESA MFWB reporting will be populated in the 2023 annual report results.													
130														

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
131	**Pilot Plus and Pilot Deep**													
132	**Customer Segments**	**# of Households Eligible [1]**	**# of Households Treated [2]**	**Enrollment Rate = (C/B)**	**# of Households Contacted**	**Enrollment Rate = (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**	**Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh)**	**Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms)**
133	**Demographic**													
134	Housing Type													
135	SF	1,213,009	-	0%	4,711	0%	-	-	-	-	-	-	-	-
136	MH	117,468	-	0%	-	0%	-	-	-	-	-	-	-	-
137	MF In-Unit	491,864	-	0%	-	0%	-	-	-	-	-	-	-	-
138	Rent vs. Own		-	0%	*	0%	-	-	-	-	-	-	-	-
139	Own	722,005	-	0%	*	0%	-	-	-	-	-	-	-	-
140	Rent	1,100,330	-	0%	*	0%	-	-	-	-	-	-	-	-
141	Previous vs. New Participant		-	0%	4,711	0%	-	-	-	-	-	-	-	-
142	Previous	1,440,864	-	0%	1,865	0%	-	-	-	-	-	-	-	-
143	New	381,476	-	0%	2,846	0%	-	-	-	-	-	-	-	-
144	Seniors	756,944	-	0%	*	0%	-	-	-	-	-	-	-	-
145	Veterans	148,890	-	0%	*	0%	-	-	-	-	-	-	-	-
146	Hard-to-Reach	792,159	-	0%	*	0%	-	-	-	-	-	-	-	-
147	Vulnerable	687,389	-	0%	*	0%	-	-	-	-	-	-	-	-
148	**Location**													
149	DAC	562,067	-	0%	1,267	0%	-	-	-	-	-	-	-	-
150	Rural	367,782	-	0%	976	0%	-	-	-	-	-	-	-	-
151	Tribal [3]	1,967	-	0%	2	0%	-	-	-	-	-	-	-	-
152	PSPS Zone	222,332	-	0%	*	0%	-	-	-	-	-	-	-	-
153	Wildfire Zone [4]	82,444	-	0%	38	0%	-	-	-	-	-	-	-	-
154	Climate Zone 11	153,226	-	0%	1,430	0%	-	-	-	-	-	-	-	-
155	Climate Zone 12	573,718	-	0%	3,281	0%	-	-	-	-	-	-	-	-
156	CARB Communities [5]	174,113	-	0%	134	0%	-	-	-	-	-	-	-	-
157	**Financial**													
158	CARE	1,401,702	-	0%	3,195	0%	-	-	-	-	-	-	-	-
159	FERA	174,219	-	0%	68	0%	-	-	-	-	-	-	-	-
160	Disconnected	-	-	0%	*	0%	-	-	-	-	-	-	-	-
161	Arrearages	554,495	-	0%	*	0%	-	-	-	-	-	-	-	-
162	High Usage	31,649	-	0%	*	0%	-	-	-	-	-	-	-	-
163	High Energy Burden [6]	1,075,439	-	0%	2	0%	-	-	-	-	-	-	-	-
164	SEVI [7]		-	0%	4,711	0%	-	-	-	-	-	-	-	-
165	High	602,765	-	0%	1,248	0%	-	-	-	-	-	-	-	-
166	Medium	830,254	-	0%	2,227	0%	-	-	-	-	-	-	-	-
167	Low	388,211	-	0%	1,236	0%	-	-	-	-	-	-	-	-
168	Affordability Ratio [8]	233,227	-	0%	558	0%	-	-	-	-	-	-	-	-
169	**Health Condition**													
170	Medical Baseline	124,753	-	0%	711	0%	-	-	-	-	-	-	-	-
171	Respiratory (Asthma) [9]		-	0%	4,711	0%	-	-	-	-	-	-	-	-
172	High	928,252	-	0%	2,424	0%	-	-	-	-	-	-	-	-
173	Medium	543,596	-	0%	1,608	0%	-	-	-	-	-	-	-	-
174	Low	350,522	-	0%	679	0%	-	-	-	-	-	-	-	-
175	Disabled	630,364	-	0%	*	0%	-	-	-	-	-	-	-	-

176 **[*]** PG&E is currently in the process of identifying method and updating its system/process to report on this customer segment.

177 [1] The estimates for eligible households will be provided based on the 250% Federal Poverty Guidelines where applicable; PG&E is awaiting eligibility estimates for 2023 from its vendor Athens, the eligiblity estimates here are based on 2022's data.

178 [2] As of the end of 2022, ESA Pilot Plus/Deep program has not completed home treatments. Households treated data is not additive because customers may be represented in multiple categories. Data is compiled based on ESA measures received YTD, and may include enrollments from prior years.

179 [3] Currently, this data only captures tribal households located on federally-recognized tribes whose trust lands are identified in the Bureau of Indian Affairs. This data currently does not include ESA participants from non federally-recognized tribes or households that self-identified as Native American. PG&E plans to incorporate self-reported information in this reporting in the future.

180 [4] Includes Zone 3 (Tier 3) of the CPUC Fire-Threat Map

181 [5] This reflects communities within PG&E's service territory that are identified by the California Air Resources Board (CARB) Community Air Protection Program as communities continue to experience environmental and health inequities from air pollution.

182 [6] PG&E utilizes the Low-Income Energy Affordability Data (LEAD) Tool developed DOE's Office of Energy Efficiency & Renewable Energy to identify census tracts with high energy burden for households at below 200 % Federal Poverty Level (FPL) that are in PG&E's service territory. The 2016 Needs Assessment for the Energy Savings Assistance and the California Alternate Rates for Energy Programs describes households that spent more 6.3% of their annual income on energy bills as having high energy burden (p.47).

183 [7] The Socioeconomic Vulnerability Index (SEVI) metric represents the relative socioeconomic standing of census tracts, referred to as communities, in terms of poverty, unemployment, educational attainment, linguistic isolation, and percentage of income spent on housing. PG&E utilizes the SEVI data provided by the CPUC to map its service territory by SEVI scores (L: 0 to 33; M: >33 to 66; H: >66).

184 [8] The Affordability Ratio (AR) metric quantifies the percentage of a representative household's income that would be used to pay for an essential utility service after non-discretionary expenses such as housing and other essential utility service charges are deducted from the household's income. Using Gas AR20 and Electric AR20 data for 2023 (using 2019 base year) provided by the CPUC, PG&E selects census tracts with Electric AR20 at above 15% or Gas AR20 above 10% to identify areas within its service territory as having high affordability ratio (CPUC 2019 Annual Affordability Report, pp 34, 44).

185 [9] PG&E utilizes the 'Asthmas' indicator in CalEnviroScreen 4.0 (published by the California Office of Environmental Health Hazard Assessment) as a proxy to identify locations with varying levels of respiratory conditions within its service territory. L: 0-33 percentile; M: >33-66 percentile; L: >66-100 percentile.

186

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
187	**Building Electrification (SCE Only)**													
188	**Customer Segments**	**# of Households Eligible**	**# of Households Treated**	**Enrollment Rate = (C/B)**	**# of Households Contacted**	**Enrollment Rate = (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**	**Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh)**	**Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms)**
189	**Demographic**													
190	Housing Type			0%		0%								
191	SF			0%		0%								
192	MH			0%		0%								
193	MF In-Unit			0%		0%								
194	Rent vs. Own			0%		0%								
195	Own			0%		0%								
196	Rent			0%		0%								
197	Previous vs. New Participant			0%		0%								
198	Seniors			0%		0%								
199	Veterans			0%		0%								
200	Hard-to-Reach			0%		0%								
201	Vulnerable			0%		0%								
202	**Location**													
203	DAC			0%		0%								
204	Rural			0%		0%								
205	Tribal			0%		0%								
206	PSPS Zone			0%		0%								
207	Wildfire Zone			0%		0%								
208	Climate Zone 7 (example)			0%		0%								
209	Climate Zone 10 (example)			0%		0%								
210	Climate Zone 14 (example)			0%		0%								
211	Climate Zone 15 (example)			0%		0%								
212	CARB Communities			0%		0%								
213	**Financial**													
214	CARE			0%		0%								
215	Disconnected			0%		0%								
216	Arrearages			0%		0%								
217	High Usage			0%		0%								
218	High Energy Burden			0%		0%								
219	SEVI			0%		0%								
220	Affordability Ratio			0%		0%								
221	**Health Condition**													
222	Medical Baseline			0%		0%								
223	Respiratory			0%		0%								
224	Disabled			0%		0%								

CARE Table 1 - CARE Overall Program Expenses
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Category	Overall Expenditures [2]			Authorized Budget [1][2]	% of Budget Spent	Total Shifted [6]	Shifted to/from?
	Electric	Gas	Total				
Outreach	$3,602,529	$900,632	$4,503,161	$6,313,326	71%	($1,466,974)	Shifted to IT Programming, CHANGES Program, and Studies and Pilots categories
Processing, Certification, Recertification	$549,700	$137,425	$687,125	$844,100	81%	$0	-
Post Enrollment Verification	$1,106,224	$276,556	$1,382,780	$1,475,900	94%	$0	-
IT Programming	$1,715,230	$428,808	$2,144,038	$2,144,038	100%	$1,053,438	Shifted from Outreach category
CHANGES Program [3]	$714,283	$178,571	$892,854	$892,854	100%	$367,854	Shifted from Outreach category
Studies and Pilots [4]	$36,546	$9,136	$45,682	$45,682	100%	$45,682	Shifted from Outreach category
Measurement & Evaluation [5]	$85,994	$21,498	$107,492	$200,000	54%	$0	-
Regulatory Compliance	$256,018	$64,004	$320,022	$369,400	87%	$0	-
General Administration	$715,540	$178,885	$894,426	$1,306,800	68%	$0	-
CPUC Energy Division	$95,053	$23,763	$118,816	$167,900	71%	$0	-
TOTAL Program Costs	**$8,877,117**	**$2,219,279**	**$11,096,396**	**$13,760,000**	**81%**	**$0**	**-**
CARE Rate Discount [7]	$801,324,709	$184,057,249	$985,381,958	$687,689,000	143%	$297,692,958	-
Service Establishment Charge Discount	$0	$0	$0	$0	0%	$0	-
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS [7]	**$810,201,825**	**$186,276,528**	**$996,478,354**	**$701,449,000**	**142%**	**$297,692,958**	**-**

[1] Reflects total authorized funding approved in D.21-06-015, Attachment 1, Table 2.

[2] 2022 authorized budget includes $1,107,039 for Benefit Burdens as approved in GRC Decision D.20-12-005. Actual employee benefit burden costs have been included in the program expenses.

[3] Decision 15-12-047 transitioned from CHANGES pilot to CHANGES program and funding for the effort is captured herein. D.21-06-015 approved funding for the CHANGES program through CARE program for PYs 2021-2026. Total expenses also includes CHANGES Evaluation expenses

[4] Reflects the budget and expenses for the CARE portion of the LINA study.

[5] Reflects the budget and expenses for Annual Eligibility Estimates prepared by Athens Research on behalf of the utilities.

[6] Reflects fund shift in accordance with the rules set forth in D.08-11-031 as modified by D.10-10-008, D.16-11-022, D.17-12-009 and D.21-06-015, which granted the IOUs authority to shift funds between the CARE program categories. The information in the "Total Shifted" and "Shifted to/from?" column is for illustrative purposes only, to disclose how funds from the overall authorized budget can be shifted between categories

[7] Total program administrative expenses did not exceed the overall authorized budget. The CARE discount exceeded the authorized amount by $297,692,958. Per D.02-09-021, PG&E is authorized to recover the full value of the discount through the CARE two-way balancing account on an automatic pass-through basis.

CARE Table 2 - CARE Enrollment, Recertification, Attrition, & Enrollment
Pacific Gas and Electric Company
Program Year 2022 Annual Report

		New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants by Dwelling Type [6]			Total CARE Participants	Estimated CARE Eligible	Enrollment Rate % (W/X)
		Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response [4]	Failed PEV	Failed Recertification	Other [5]	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)	SF	MF	MH			
		Inter-Utility [1]	Intra-Utility [2]	Leveraging [3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																		
8	**January**	0	652	0	652	14,600	3,237	455	26	18,318	18,970	55,136	16,906	5,439	77,481	n/a	8,699	18,721	6,089	33,509	96,451	-14,539				1,536,454	1,401,702	110%
9	**February**	0	846	0	846	11,407	3,742	510	85	15,744	16,590	59,591	13,921	5,777	79,289	n/a	4,368	13,530	7,256	25,154	95,879	-8,564				1,527,890	1,401,702	109%
10	**March**	2,665	932	0	3,597	13,985	3,356	517	104	17,962	21,559	43,459	15,979	70,297	129,735	n/a	3,948	23,597	14,084	41,629	151,294	-20,070				1,507,820	1,401,702	108%
11	**April**	0	867	0	867	9,444	2,218	451	109	12,222	13,089	24,902	10,830	4,516	40,248	n/a	4,809	16,550	-3,559	17,800	53,337	-4,711				1,503,109	1,401,702	107%
12	**May**	0	481	0	481	8,979	2,677	331	84	12,071	12,552	30,608	15,891	3,367	49,866	n/a	6,531	13,980	17,942	38,453	62,418	-25,901				1,477,208	1,401,702	105%
13	**June**	0	505	0	505	12,729	3,053	486	64	16,332	16,837	18,613	9,037	3,807	31,457	n/a	4,827	17,302	-1,027	21,102	48,294	-4,265				1,472,943	1,401,702	105%
14	**July**	0	691	0	691	12,884	4,023	492	60	17,459	18,150	19,861	7,307	2,793	29,961	n/a	3,938	14,384	18,324	36,646	48,111	-18,496				1,454,447	1,401,702	104%
15	**August**	0	455	0	455	15,251	3,079	617	59	19,006	19,461	11,454	10,944	376	22,774	n/a	3,189	4,815	8,437	16,441	42,235	3,020				1,457,467	1,401,702	104%
16	**September**	0	418	0	418	15,067	14,370	460	44	29,941	30,359	11,354	11,594	185	23,133	n/a	4,807	571	7,075	12,453	53,492	17,906				1,475,373	1,401,702	105%
17	**October**	0	507	0	507	13,517	1,894	498	73	15,982	16,489	22,085	8,942	6,431	37,458	n/a	8,601	885	8,602	18,088	53,947	-1,599				1,473,774	1,401,702	105%
18	**November**	0	692	184	876	12,825	2,001	960	57	15,843	16,719	16,067	10,225	3,333	29,625	n/a	336	1,005	9,582	10,923	46,344	5,796				1,479,570	1,401,702	106%
19	**December**	2,446	720	0	3,166	15,554	2,605	1,033	73	19,265	22,431	12,050	16,174	67,154	95,378	n/a	6,578	3,501	22,198	32,277	117,809	-9,846				1,469,724	1,401,702	105%
20	**YTD Total**	**5,111**	**7,766**	**184**	**13,061**	**156,242**	**46,255**	**6,810**	**838**	**210,145**	**223,206**	**325,180**	**147,750**	**173,475**	**646,405**	**n/a**	**60,631**	**128,841**	**115,003**	**304,475**	**869,611**	**-81,269**	**954,827**	**476,280**	**38,617**	**1,469,724**	**1,401,702**	**105%**

21 [1] Enrollments via data sharing between the IOUs.
22 [2] Enrollments via data sharing between departments and/or programs within the utility.
23 [3] Enrollments via data sharing with programs outside the IOU that serve low-income customers.
24 [4] PG&E counts attrition due to no response in the Failed PEV and Failed Recertification columns, respectively.
25 [5] Includes customers who closed their accounts, requested to be removed, or were otherwise ineligible for the program.
26 [6] Based on SF and MF structure configuration as noted in PG&E's billing system; MH reflects sub-metered dwelling units

CARE Table 3 - CARE Post-Enrollment Verification Results
Pacific Gas and Electric Company
Program Year 2022 Annual Report

CARE Table 3A - Post-Enrollment Verification Results (Model) 2022

Month	Total CARE Households Enrolled	Households Requested to Verify [1]	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) [2]	Total Households De-enrolled [3]	% De-enrolled through Post Enrollment Verification [4]	% of Total CARE Households De-enrolled
January	1,536,454	4,411	0.29%	3,387	234	3,621	82%	0.24%
February	1,527,890	5,264	0.34%	4,222	236	4,458	85%	0.29%
March	1,507,820	4,998	0.33%	3,839	309	4,148	83%	0.28%
April	1,503,109	3,833	0.26%	3,079	157	3,236	84%	0.22%
May	1,477,208	4,162	0.28%	3,376	165	3,541	85%	0.24%
June	1,472,943	4,355	0.30%	3,431	197	3,628	83%	0.25%
July	1,454,447	4,306	0.30%	3,421	174	3,595	83%	0.25%
August	1,457,467	4,150	0.28%	3,258	165	3,423	82%	0.23%
September	1,475,373	6,256	0.42%	4,237	377	4,614	74%	0.31%
October	1,473,774	7,974	0.54%	5,692	446	6,138	77%	0.42%
November	1,479,570	2,958	0.20%	2,254	149	2,403	81%	0.16%
December	1,469,724	45,258	3.08%	33,920	1,980	35,900	79%	2.44%
YTD Total	**1,469,724**	**97,925**	**6.66%**	**74,116**	**4,589**	**78,705**	**80%**	**5.36%**

[1] Includes customers selected randomly or via PG&E's CARE probability model.
[2] Includes customers verified as over income or who requested to be de-enrolled.
[3] Verification results are tied to the month initiated.
[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.

CARE Table 3B - Post-Enrollment Verification Results (Electric only High Usage)

Month	Total CARE Households Enrolled	Households Requested to Verify [1]	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) [2]	Total Households De-enrolled [3]	% De-enrolled through HUV Post Enrollment Verification	% of Total CARE Households De-enrolled
January	1,536,454	1,004	0.07%	857	34	891	89%	0.06%
February	1,527,890	1,292	0.08%	1,149	51	1,200	93%	0.08%
March	1,507,820	3,236	0.21%	2,822	119	2,941	91%	0.20%
April	1,503,109	2,491	0.17%	2,185	79	2,264	91%	0.15%
May	1,477,208	852	0.06%	728	36	764	90%	0.05%
June	1,472,943	813	0.06%	712	28	740	91%	0.05%
July	1,454,447	1,882	0.13%	1,658	45	1,703	90%	0.12%
August	1,457,467	2,007	0.14%	1,692	72	1,764	88%	0.12%
September [4]	1,475,373	0	0.00%	0	0	0	0%	0.00%
October	1,473,774	1,606	0.11%	1,399	49	1,448	90%	0.10%
November	1,479,570	1,806	0.12%	1,595	52	1,647	91%	0.11%
December	1,469,724	2,467	0.17%	2,213	54	2,267	92%	0.15%
YTD Total	**1,469,724**	**19,456**	**1.32%**	**17,010**	**619**	**17,629**	**91%**	**1.20%**

[1] Includes all participants who were selected for high usage verification process.
[2] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.
[3] Verification results are tied to the month initiated.
[4] Due to a change to the HU PEV process, no HU PEV took place in September.

	A	B	C	D	E	F	G
1	**CARE Table 4 - CARE Self-Certification and Self-Recertification Applications [1]**						
2	**Pacific Gas and Electric Company**						
3	**Program Year 2022 Annual Report**						
4							
5		**Provided [2]**	**Received**	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**
6	**Total (Y-T-D)**	3,102,336	474,663	416,479	42,006	16,178	147,750
7	**Percentage [3]**		100%	88%	9%	3%	31%
8	[1] Includes sub-metered customers.						
9	[2] Includes number of applications provided via direct mail campaigns, call centers, bill inserts and other outreach methods. Because there are other means by which customers obtain applications which are not counted, this number is only an approximation.						
10	[3] Percentage of Received. Duplicates are also counted as Approved, so the total will not add up to 100%.						

CARE Table 5 - CARE Enrollment by County
Pacific Gas and Electric Company
Program Year 2022 Annual Report

County	Estimated Eligible			Total Participants			Enrollment Rate		
	Urban	Rural [1]	Total	Urban	Rural [1]	Total	Urban	Rural [1]	Total
ALAMEDA	114,857	3	114,860	124,171	1	124,172	108%	34%	108%
ALPINE	0	114	114	0	11	11	n/a	10%	10%
AMADOR	1	5,226	5,227	0	4,382	4,382	0%	84%	84%
BUTTE	21,373	11,976	33,349	20,342	12,363	32,705	95%	103%	98%
CALAVERAS	9	7,655	7,664	15	5,271	5,286	168%	69%	69%
COLUSA	12	2,183	2,195	5	3,478	3,483	41%	159%	159%
CONTRA COSTA	76,638	1	76,639	94,052	0	94,052	123%	0%	123%
EL DORADO	7,609	6,489	14,098	6,004	5,899	11,903	79%	91%	84%
FRESNO	123,228	170	123,398	156,876	91	156,967	127%	54%	127%
GLENN	0	3,508	3,508	0	4,717	4,717	n/a	134%	134%
HUMBOLDT	0	19,759	19,759	0	17,818	17,818	n/a	90%	90%
KERN	37,923	59,404	97,327	51,506	70,998	122,504	136%	120%	126%
KINGS	87	7,582	7,669	136	10,300	10,436	156%	136%	136%
LAKE	0	14,205	14,205	0	12,635	12,635	n/a	89%	89%
LASSEN	0	250	250	0	168	168	n/a	67%	67%
MADERA	11,899	4,688	16,587	18,229	5,802	24,031	153%	124%	145%
MARIN	16,239	0	16,239	14,084	0	14,084	87%	n/a	87%
MARIPOSA	29	3,627	3,656	20	2,297	2,317	69%	63%	63%
MENDOCINO	22	14,654	14,676	1	10,379	10,380	5%	71%	71%
MERCED	17,940	17,721	35,661	20,239	21,948	42,187	113%	124%	118%
MONTEREY	34,633	4,633	39,265	39,201	6,300	45,501	113%	136%	116%
NAPA	11,198	0	11,198	11,255	0	11,255	101%	0%	101%
NEVADA	6	10,447	10,453	0	9,521	9,521	0%	91%	91%
PLACER	19,435	8,860	28,295	14,375	7,927	22,302	74%	89%	79%
PLUMAS	104	2,498	2,602	8	1,632	1,640	8%	65%	63%
SACRAMENTO	123,014	0	123,014	92,661	0	92,661	75%	n/a	75%
SAN BENITO	85	4,536	4,620	77	6,025	6,102	91%	133%	132%
SAN BERNARDINO	40	256	295	22	249	271	56%	97%	92%
SAN FRANCISCO	64,494	0	64,494	51,959	0	51,959	81%	n/a	81%
SAN JOAQUIN	75,102	8,030	83,133	82,029	9,581	91,610	109%	119%	110%
SAN LUIS OBISPO	11,139	16,125	27,264	6,253	15,924	22,177	56%	99%	81%
SAN MATEO	40,074	0	40,074	37,578	0	37,578	94%	n/a	94%
SANTA BARBARA	14,604	1,182	15,786	21,269	929	22,198	146%	79%	141%
SANTA CLARA	91,994	3,684	95,677	109,546	3,198	112,744	119%	87%	118%
SANTA CRUZ	20,863	7	20,869	19,642	1	19,643	94%	15%	94%
SHASTA	10,225	10,661	20,886	9,762	8,580	18,342	95%	80%	88%
SIERRA	8	360	368	1	115	116	12%	32%	31%
SISKIYOU	0	16	16	0	7	7	n/a	45%	45%
SOLANO	36,064	0	36,064	45,669	0	45,669	127%	n/a	127%
SONOMA	43,522	2,641	46,163	40,250	2,739	42,989	92%	104%	93%
STANISLAUS	29,585	25,973	55,558	23,100	22,465	45,565	78%	86%	82%
SUTTER	11,554	0	11,555	13,237	0	13,237	115%	0%	115%
TEHAMA	11	9,258	9,269	4	11,227	11,231	38%	121%	121%
TRINITY	0	556	556	0	270	270	n/a	49%	49%
TULARE	536	6,648	7,184	367	10,056	10,423	69%	151%	145%
TUOLUMNE	0	8,977	8,977	0	7,297	7,297	n/a	81%	81%
YOLO	21,107	1	21,108	21,637	1	21,638	103%	185%	103%
YUBA	9,765	113	9,878	11,430	110	11,540	117%	98%	117%
Total	**1,097,025**	**304,677**	**1,401,702**	**1,157,012**	**312,712**	**1,469,724**	**105%**	**103%**	**105%**

[1] Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.

CARE Table 6 - CARE Recertification Results
Pacific Gas and Electric Company
Program Year 2022 Annual Report

2022	Total CARE Households	Households Requested to Recertify [1]	% of Households Total (C/B)	Households Recertified [2]	Households De-enrolled [3]	Recertification Rate % [4] (E/C)	% of Total Households De-enrolled (F/B)
January	1,536,454	38,218	2.5%	21,668	16,550	57%	1.08%
February	1,527,890	33,516	2.2%	19,536	13,980	58%	0.91%
March	1,507,820	39,919	2.6%	22,617	17,302	57%	1.15%
April	1,503,109	27,881	1.9%	13,497	14,384	48%	0.96%
May	1,477,208	8,611	0.6%	3,796	4,815	44%	0.33%
June	1,472,943	8,749	0.6%	2,205	6,544	25%	0.44%
July	1,454,447	8,427	0.6%	1,849	6,578	22%	0.45%
August	1,457,467	8,343	0.6%	2,245	6,098	27%	0.42%
September	1,475,373	8,561	0.6%	5,060	3,501	59%	0.24%
October	1,473,774	6,498	0.4%	2,572	3,926	40%	0.27%
November	1,479,570	12,288	0.8%	4,885	7,403	40%	0.50%
December	1,469,724	22,275	1.5%	11,384	10,891	51%	0.74%
YTD	**1,469,724**	**223,286**	**15.19%**	**111,314**	**111,972**	**50%**	**7.62%**

[1] Excludes count of customers recertified through the probability model.

[2] Recertification results are tied to the month initiated.

[3] Includes customers who did not respond or who requested to be de-enrolled.

[4] Percentage of customers recertified compared to the total participants requested to recertify in that month.

CARE Table 7 - CARE Capitation Contractors
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Contractor Name [1]	Contractor Type (Check one or more if applicable)				Enrollments [2]			Total Expenditures [3]
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
Amador-Tuolumne Community Action Agency		x		x	19	0	19	$ 570
Arriba Juntos		x			0	0	0	$ -
Breathe California		x			0	0	0	$ -
Catholic Daisies of Fresno		x			3	4	7	$ 210
Central Coast Energy Services Inc		x		x	6	152	158	$ 4,740
Cesar A Moncada DBA Moncada Outreach		x			0	154	154	$ 4,620
Child Abuse Prevention Council of San Joaquin County		x			0	0	0	$ -
Community Action Marin		x		x	0	1	1	$ 30
Community Action Partnership of Madera County		x		x	14	32	46	$ 1,380
Community Resource Project Inc		x		x	0	284	284	$ 8,520
El Puente Comunitario		x			0	1	1	$ 30
Human Investment Project Housing Inc (HIP)		x			0	0	0	$ -
Independent Living Center of Kern County Inc		x			5	3	8	$ 240
Interfaith Food Bank & Thrift Store of Amador County		x			0	0	0	$ -
KidsFirst		x			0	0	0	$ -
Kings Community Action Organization Inc		x		x	0	0	0	$ -
Merced County Community Action Agency		x		x	5	9	14	$ 420
National Asian American Coalition		x			0	0	0	$ -
North Coast Energy Services, Inc		x			97	30	127	$ 3,810
Resources for Independence Central Valley		x			0	0	0	$ -
Sacred Heart Community Service		x		x	0	19	19	$ 570
UpValley Family Centers		x			0	0	0	$ -
Valley Clean Air		x			0	0	0	$ -
West Valley Community Services		x			0	0	0	$ -
Total Enrollments and Expenditures					**149**	**689**	**838**	**$ 25,140**

[1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.

[2] Enrollments reflect new enrollments only.

[3] Expenditures reflect payments made in 2022 and may not correlate directly with enrollment numbers due to unsubmitted invoices or timing differences.

	A	B	C	D	E	F	G	H
1	**CARE Table 8 - CARE Participants as of Month-End**							
2	**Pacific Gas and Electric Company**							
3	**Program Year 2022 Annual Report**							
4								
5	**2022**	**Gas and Electric**	**Gas Only**	**Electric Only**	**Total**	**Eligible Households**	**Enrollment Rate**	**% Change**
6	**January**	946,420	204,294	385,740	1,536,454	1,401,702	110%	n/a
7	**February**	940,672	203,181	384,037	1,527,890	1,401,702	109%	-0.61%
8	**March**	927,477	199,551	380,792	1,507,820	1,401,702	108%	-1.43%
9	**April**	922,356	199,330	381,423	1,503,109	1,401,702	107%	-0.34%
10	**May**	905,627	195,948	375,633	1,477,208	1,401,702	105%	-1.85%
11	**June**	902,063	195,571	375,309	1,472,943	1,401,702	105%	-0.30%
12	**July**	890,789	192,272	371,386	1,454,447	1,401,702	104%	-1.32%
13	**August**	898,575	187,562	371,330	1,457,467	1,401,702	104%	0.22%
14	**September**	910,437	190,606	374,330	1,475,373	1,401,702	105%	1.28%
15	**October**	908,738	190,984	374,052	1,473,774	1,401,702	105%	-0.11%
16	**November**	913,017	192,059	374,494	1,479,570	1,401,702	106%	0.41%
17	**December**	905,004	190,164	374,556	1,469,724	1,401,702	105%	-0.70%

CARE Table 9 - CARE Average Monthly Usage & Bill
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Average Monthly Gas / Electric Usage
Residential Non-CARE vs. CARE Customers [1]

Customer	Gas Therms Tier 1	Gas Therms Tier 2	Total
Non-CARE	21.7	12.0	33.7
CARE	19.6	8.6	28.2

Customer	Electric KWh Tier 1	Electric KWh Tier 2 and Above	Total
Non-CARE	120	318	438
CARE	223	281	504

Average Monthly Gas / Electric Bill [2]
Residential Non-CARE vs. CARE Customers [1]
(Dollars per Customer)

Customer	Gas	Electric [3]
Non-CARE	$74.54	$117.57
CARE	$58.11	$88.77

[1] Excludes master-meter usage.
[2] Reflects 2022 total billed usage revenues divided by the average number of 2022 monthly bills.
[3] Electric includes both bundled and DA/CCA customers. Revenues and associated bills are for services provided by PG&E only, and will be lower for DA/CCA customers because they exclude generation revenues.

CARE Table 10 - CARE Surcharge & Revenue
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Electric

CARE Surcharge and Revenue Collected by Customer Class

Customer Class [1] [3]	Average Monthly		CARE Surcharge	Total CARE Surcharge Revenue	Percentage of CARE Surcharge
	CARE Surcharge	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential	$5.18	$118	4.4%	$223,077,309	27.65%
Commercial	$51.51	$841	6.1%	$334,420,164	41.45%
Agricultural	$82.63	$1,744	4.7%	$87,921,853	10.90%
Large/Indust	$12,014.54	$123,103	9.8%	$161,308,826	20.00%

Gas

CARE Surcharge and Revenue Collected by Customer Class

Customer Class [1]	Average Monthly		CARE Surcharge	Total CARE Surcharge Revenue	Percentage of CARE Surcharge
	CARE Surcharge [2]	Monthly Bill	Bill	Collected	Revenue Collected
Residential	$1.39	$75	1.87%	$58,799,642	36.23%
Commercial	$12.46	$449	2.78%	$33,075,985	20.38%
Natural Gas Vehicle	$106.68	$3,571	2.99%	$1,809,680	1.12%
Industrial [2]	$8,933.10	$137,311	6.51%	$68,610,955	42.28%

[1] Excludes CARE customers.
[2] Industrial includes both G-NT(D), G-NT(T), G-NT(BB), and GNGV4 and is net of volumes qualifying for G-COG.
[3] Includes both bundled and DA/CCA customers. Revenues and associated bills are for services provided by PG&E only, and will be lower for DA/CCA customers because they exclude generation revenues.

CARE Table 11 - CARE Capitation Applications [1]
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Entity	Total Received	Approved [2]	Denied	Pending/ Never Completed	Duplicate
Amador-Tuolumne Community Action Agency	34	19	6	0	9
Catholic Daisies of Fresno	19	7	1	0	11
Central Coast Energy Services Inc	268	158	42	0	68
Cesar A Moncada DBA Moncada Outreach	222	154	2	0	66
Child Abuse Prevention Council of San Joaquin County	1	0	0	0	1
Community Action Marin	2	1	0	0	1
Community Action Partnership of Madera County	60	46	3	0	11
Community Resource Project Inc	347	284	22	0	41
El Puente Comunitario	12	1	1	0	10
Independent Living Center of Kern County Inc	9	8	1	0	0
Interfaith Food Bank & Thrift Store of Amador County	1	0	0	0	1
Merced County Community Action Agency	25	14	9	0	2
North Coast Energy Services, Inc	351	127	80	0	144
Sacred Heart Community Service	49	19	5	0	25
UpValley Family Centers	1	0	0	0	1
Total	**1,401**	**838**	**172**	**0**	**391**

[1] Includes sub-metered customers.
[2] Includes new enrollments only.

CARE Table 12 - CARE Expansion Program
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Participating Facilities by Month

2022	Gas			Electric		
	CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
January	3,017	515	3,532	2,706	956	3,662
February	3,025	515	3,540	2,707	961	3,668
March	3,086	520	3,606	2,948	976	3,924
April	3,087	523	3,610	2,983	984	3,967
May	3,076	521	3,597	2,972	985	3,957
June	3,080	525	3,605	2,982	990	3,972
July	3,066	526	3,592	2,964	991	3,955
August	3,054	528	3,582	2,957	989	3,946
September	3,041	528	3,569	2,944	988	3,932
October	3,059	531	3,590	2,962	990	3,952
November	2,509	530	3,039	2,808	982	3,790
December	2,964	529	3,493	2,865	985	3,850

Average Monthly Gas / Electric Usage [1]

Customer	Gas	Electric
	Therms	KWh
Residential Facilities	43	503
Commercial Facilities	718	8,218

[1] Excludes master meter usage.

CARE Expansion Self-Certification and Self-Recertification Applications

	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	228	190	3	19	16
Percentage		83%	1%	8%	7%

CARE Table 13 - CARE High Usage Verification Results [5]
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation [6]			Stage 3 - Usage Monitoring		
Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) [1]	Income Verified and Referred to ESA	Failed and Removed [2]	Ineligible [3]	Completed	Removed [4]	Appeals Denied	Appeals Approved
19,445	14,878	840	3,727	0	82	223	3	0	0

[1] Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.

[2] Includes customers who declined to participate in ESA Program, failed to respond to appointment requests or missed multiple appointments, or denied access to all rooms.

[3] Includes customers who previously participated in ESA Program, landlord refused, etc. These customers move directly to Stage 3.

[4] Customers removed for exceeding 600% of baseline in any monthly billing cycle, after the 90-day grace period following ESA Participation.

[5] High usage is defined as electric customers with usage above 400% of baseline 3 times in a 12-month period. Results reflect status as of March 22, 2023.

[6] Does not include 3,422 customers still pending ESA participation.

CARE Table 13A - CARE Customer Usage and ESA Program Treatment
Pacific Gas and Electric Company
Program Year 2022 Annual Report

# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV [1]	Percent of those CARE customers Not served by ESA Program [2]	# of Enrollments led to ESA Program measure Installations	# of Long-Term tenancy CARE customers who have Not applied for ESA Program	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment [3]				Energy Usage of CARE customers who do Not accept ESA Program treatment [3]
				Energy Usage before ESA Program treatment	Energy Usage within 3-months of ESA Program treatment	Energy Usage within 6-months of ESA Program treatment	Energy Usage within 12-months of ESA Program treatment	
23,408	66%	7,921	15,487	1,160	1,158	1,163	1,179	1,239

[1] Those CARE customers who have been on the CARE rate at the same meter for at least six years; 90th percentile of usage determined at the customer level after applying tenancy and HU PEV filters
[2] Customers who have not participated in ESA since 2018
[3] Reflects average monthly kWh usage

	A	B
1	**CARE Table 14 - CARE Categorical Enrollment**	
2	**Pacific Gas and Electric Company**	
3	**Program Year 2022 Annual Report**	
4		
5	**Type of Enrollment**	**Number of Customer Enrollments [1]**
6	Bureau of Indian Affairs General Assistance	182
7	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	67,599
8	CalWORKs/Temporary Assistance for Needy Families (TANF) [2]	8,878
9	Head Start Income Eligible - (Tribal Only)	552
10	Healthy Families A&B	53,212
11	Low-income Home Energy Assistance Program (LIHEAP)	18,475
12	Medicaid/Medi-Cal	76,085
13	National School Lunch Program (NSLP) - Free Lunch	18,529
14	Supplemental Security Income (SSI)	29,356
15	Tribal TANF [2]	8,878
16	Women, Infants, and Children Program (WIC)	20,395
17	[1] Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.	
18	[2] CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	

	A	B	C	D	E
1	**CARE Table 15 - CARE and Disadvantaged Communities Enrollment Rate for Zip Codes**				
2	**Pacific Gas and Electric Company**				
3	**Program Year 2022 Annual Report**				
4					
5	**Total CARE Households Enrolled**				
6	**Month**	**CARE Enrollment Rate for Zip Codes That Have 10% or More Disconnections [1]**	**CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG) [2]**	**CARE Enrollment Rate for Zip Codes in High Poverty (with 70% or Less CARE Penetration) [2]**	**CARE Enrollment Rate for DAC (Zip/Census Track) Codes in High Poverty (with 70% or Less CARE Enrollment Rate) [2] [3]**
7	January	n/a	n/a	n/a	n/a
8	February	n/a	n/a	n/a	n/a
9	March	n/a	n/a	n/a	n/a
10	April	n/a	n/a	n/a	n/a
11	May	n/a	n/a	n/a	n/a
12	June	n/a	105%	35%	39%
13	July	n/a	104%	34%	38%
14	August	n/a	105%	34%	37%
15	September	n/a	106%	33%	38%
16	October	n/a	105%	34%	37%
17	November	n/a	106%	34%	37%
18	December	n/a	105%	35%	37%
19	[1] Disconnection Rates are based on the previous year. PG&E did not perform any disconnections in 2021.				
20	[2] Includes zip codes with >25% of customers with incomes less than 100% FPG.				
21	[3] DACs are defined at the census tract level. Corresponding zip codes are provided for the purpose of this table; however, the entire zip code listed may not be considered a DAC.				
22					
23	**Note:**				
24	*Data was not available prior to June 2022				
25	*Penetration Rate and Enrollment Rate are the same value.				

FERA Table 1 - FERA Overall Program Expenses
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Category	Overall Expenditures [2]			Authorized Budget [1][2]	% of Budget Spent	Total Shifted [3]	Shifted to/from?
	Electric	Gas	Total				
Outreach	$2,792,378	$0	$2,792,378	$2,736,030	102%	$217,278	Shifted $160,930 from Processing, Certification, Recertification, Post Enrollment Verification, Regulatory Compliance, and General Administration categories
Processing, Certification, Recertification	$8,838	$0	$8,838	$8,838	100%	($46,562)	Shifted to Outreach category
Post Enrollment Verification	$0	$0	$0	$0	0%	($81,500)	Shifted to Outreach category
IT Programming	$0	$0	$0	$0	0%		
Pilots	$0	$0	$0	$0	0%		
Measurement & Evaluation	$0	$0	$0	$0	0%		
Regulatory Compliance	$0	$0	$0	$0	0%	($28,700)	Shifted to Outreach category
General Administration	$49,533	$0	$49,533	$49,533	100%	($4,167)	Shifted to Outreach category
CPUC Energy Division	$0	$0	$0	$0	0%		
TOTAL Program Costs	**$2,850,749**	**$0**	**$2,850,749**	**$2,794,400**	**102%**	**$56,349**	
FERA Rate Discount [4]	$17,196,193		$17,196,193	$12,898,000	133%	$4,298,193	
Service Establishment Charge Discount	$0	$0	$0	$0	0%	$0	
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS [4]	**$20,046,942**	**$0**	**$20,046,942**	**$15,692,400**	**128%**	**$4,354,542**	

[1] Reflects total authorized funding approved in D.21-06-015, Attachment 1, Table 4.

[2] 2022 authorized budget includes $505 for Benefit Burdens as approved in GRC D.20-12-005. Actual employee benefit burden costs have been included in the program expenses.

[3] Reflects fund shift in accordance with the rules set forth in D.21-06-015, which granted the IOUs authority to shift funds between the FERA program categories. The information in the "Total Shifted" and "Shifted to/from?" column is for illustrative purposes only, to disclose how funds from the overall authorized budget can be shifted between categories

[4] Total program administrative expenses exceeded the authorized budget by $56,349. The FERA discount exceeded the authorized amount by $4,298,193. Per D.21-06-015, PG&E is authorized to recover the full value of the discount through the FERA two-way balancing account on an automatic pass-through basis.

FERA Table 2 - FERA Enrollment, Recertification, Attrition, & Enrollment
Pacific Gas and Electric Company
Program Year 2022 Annual Report

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment		Total FERA Participants by Dwelling Type [6]			Total FERA Participants	Estimated FERA Eligible	Enrollment Rate % (W/X)
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response [4]	Failed PEV	Failed Recertification	Other [5]	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)	SF	MF	MH			
	Inter-Utility [1]	Intra-Utility [2]	Leveraging [3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																		
January	0	0	0	0	1,680	348	19	0	2,047	2,047	773	177	0	950	0	0	740	369	1,109	2,997	938				39,800	174,219	23%
February	0	0	0	0	658	290	12	1	961	961	1,636	161	0	1,797	0	0	846	226	1,072	2,758	-111				39,689	174,219	23%
March	0	0	0	0	1,092	246	13	0	1,351	1,351	1,252	148	0	1,400	0	0	1,096	37	1,133	2,751	218				39,907	174,219	23%
April	0	0	0	0	456	217	15	0	688	688	783	148	0	931	0	0	858	7	865	1,619	-177				39,730	174,219	23%
May	0	0	0	0	421	285	17	1	724	724	907	215	0	1,122	0	0	957	219	1,176	1,846	-452				39,278	174,219	23%
June	0	0	0	0	720	185	21	0	926	926	801	178	0	979	0	0	2,455	-1,199	1,256	1,905	-330				38,948	174,219	22%
July	0	0	0	0	723	240	25	1	989	989	510	140	0	650	0	0	2,007	1,287	3,294	1,639	-2,305				36,643	174,219	21%
August	0	50	0	50	850	309	30	0	1,189	1,239	742	164	0	906	0	0	988	570	1,558	2,145	-319				36,324	174,219	21%
September	0	27	0	27	771	254	31	0	1,056	1,083	295	99	0	394	0	0	425	21	446	1,477	637				36,961	174,219	21%
October	0	20	0	20	683	178	32	0	893	913	299	100	0	399	0	0	871	233	1,104	1,312	-191				36,770	174,219	21%
November	0	45	0	45	628	174	65	1	868	913	380	120	0	500	0	0	798	12	810	1,413	103				36,873	174,219	21%
December	0	22	0	22	700	225	62	0	987	1,009	312	120	0	432	0	0	604	626	1,230	1,441	-221				36,652	174,219	21%
YTD Total	**0**	**164**	**0**	**164**	**9,382**	**2,951**	**342**	**4**	**12,679**	**12,843**	**8,690**	**1,770**	**0**	**10,460**	**0**	**0**	**12,645**	**2,408**	**15,053**	**23,303**	**-2,210**	**29,173**	**7,479**	**n/a**	**36,652**	**174,219**	**21%**

[1] Enrollments via data sharing between the IOUs.
[2] Enrollments via data sharing between departments and/or programs within the utility.
[3] Enrollments via data sharing with programs outside the IOU that serve low-income customers.
[4] PG&E counts attrition due to no response in the Failed PEV and Failed Recertification columns, respectively.
[5] Includes customers who closed their accounts, requested to be removed, or were otherwise ineligible for the program.
[6] Based on SF and MF structure configuration as noted in PG&E's billing system; does not include sub-metered tenants.

FERA Table 3 - FERA Post-Enrollment Verification Results
Pacific Gas and Electric Company
Program Year 2022 Annual Report

FERA Table 3A - Post-Enrollment Verification Results (Model) 2022

Month	Total FERA Households Enrolled	Households Requested to Verify [1]	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible) [2]	Total Households De-enrolled [3]	% De-enrolled through Post Enrollment Verification [4]	% of Total FERA Households De-enrolled
January	39,800	0	0.00%	0	0	0	0%	0.00%
February	39,689	0	0.00%	0	0	0	0%	0.00%
March	39,907	0	0.00%	0	0	0	0%	0.00%
April	39,730	0	0.00%	0	0	0	0%	0.00%
May	39,278	0	0.00%	0	0	0	0%	0.00%
June	38,948	0	0.00%	0	0	0	0%	0.00%
July	36,643	0	0.00%	0	0	0	0%	0.00%
August	36,324	0	0.00%	0	0	0	0%	0.00%
September	36,961	0	0.00%	0	0	0	0%	0.00%
October	36,770	0	0.00%	0	0	0	0%	0.00%
November	36,873	0	0.00%	0	0	0	0%	0.00%
December	36,652	0	0.00%	0	0	0	0%	0.00%
YTD Total	**36,652**	**0**	**0.00%**	**0**	**0**	**0**	**0%**	**0.00%**

[1] Includes customers selected randomly.
[2] Includes customers verified as over income or who requested to be de-enrolled.
[3] Verification results are tied to the month initiated.
[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.

FERA Table 3B - Post-Enrollment Verification Results (Electric only High Usage)

Month	Total FERA Households Enrolled	Households Requested to Verify [1]	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible) [2]	Total Households De-enrolled [3]	% De-enrolled through Post Enrollment Verification	% of Total FERA Households De-enrolled
January	39,800	0	0.00%	0	0	0	0%	0.00%
February	39,689	0	0.00%	0	0	0	0%	0.00%
March	39,907	0	0.00%	0	0	0	0%	0.00%
April	39,730	0	0.00%	0	0	0	0%	0.00%
May	39,278	0	0.00%	0	0	0	0%	0.00%
June	38,948	0	0.00%	0	0	0	0%	0.00%
July	36,643	0	0.00%	0	0	0	0%	0.00%
August	36,324	0	0.00%	0	0	0	0%	0.00%
September	36,961	0	0.00%	0	0	0	0%	0.00%
October	36,770	0	0.00%	0	0	0	0%	0.00%
November	36,873	1,166	3.16%	1,070	39	1,109	95%	3.01%
December	36,652	524	1.43%	480	14	494	94%	1.35%
YTD Total	**36,652**	**1,690**	**4.61%**	**1,550**	**53**	**1,603**	**95%**	**4.37%**

[1] Includes all participants who were selected for high usage verification process.
[2] Includes customers verified as over income or who requested to be de-enrolled.
[3] Verification results are tied to the month initiated.

FERA Table 4 - FERA Self-Certification and Self-Recertification Applications [1]
Pacific Gas and Electric Company
Program Year 2022 Annual Report

FERA Table 4A - Self-Certification and Self-Recertification Applications [1]

	Provided [2]	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	**2,661,763**	**23,743**	**21,979**	**1,369**	**395**	**1,776**
Percentage [3]		100%	93%	6%	2%	7%

[1] Includes sub-metered customers.

[2] Includes number of applications provided via direct mail campaigns, call centers, bill inserts and other outreach methods. Because there are other means by which customers obtain applications which are not counted, this number is only an approximation.

[3] Percentage of Received. Duplicates are also counted as Approved, so the total will not add up to 100%.

FERA Table 4B - Post-Enrollment Verification [1]

	Requested	Received	Approved	Denied	Pending/Never Completed
Total	**1,690**	**204**	**87**	**53**	**1,550**

[1] Includes sub-metered customers.

FERA Table 5 - FERA Enrollment by County
Pacific Gas and Electric Company
Program Year 2022 Annual Report

County	Estimated Eligible			Total Participants			Enrollment Rate		
	Urban	Rural [1]	Total	Urban	Rural	Total	Urban	Rural	Total
ALAMEDA	14,249	0	14,249	3,355	0	3,355	24%	0%	24%
ALPINE	0	6	6	0	0	0	n/a	0%	0%
AMADOR	0	453	453	0	134	134	0%	30%	30%
BUTTE	2,228	1,139	3,366	411	199	610	18%	17%	18%
CALAVERAS	1	752	753	0	160	160	0%	21%	21%
COLUSA	3	638	640	0	78	78	0%	12%	12%
CONTRA COSTA	13,437	0	13,437	3,366	0	3,366	25%	0%	25%
EL DORADO	854	677	1,531	320	219	539	37%	32%	35%
FRESNO	16,482	21	16,504	3,662	4	3,666	22%	19%	22%
GLENN	0	803	804	0	107	107	0%	13%	13%
HUMBOLDT	0	1,693	1,693	0	398	398	n/a	24%	24%
KERN	5,243	9,173	14,416	1,363	859	2,222	26%	9%	15%
KINGS	18	1,592	1,610	2	242	244	11%	15%	15%
LAKE	0	1,168	1,168	0	246	246	n/a	21%	21%
LASSEN	0	15	15	0	0	0	n/a	0%	0%
MADERA	2,530	999	3,529	423	143	566	17%	14%	16%
MARIN	1,641	0	1,641	362	0	362	22%	n/a	22%
MARIPOSA	2	261	263	1	49	50	48%	19%	19%
MENDOCINO	2	1,226	1,228	0	227	227	0%	19%	18%
MERCED	2,798	2,613	5,412	410	537	947	15%	21%	17%
MONTEREY	6,949	925	7,874	835	116	951	12%	13%	12%
NAPA	2,241	0	2,241	315	0	315	14%	0%	14%
NEVADA	0	767	768	0	259	259	0%	34%	34%
PLACER	1,155	1,049	2,204	507	286	793	44%	27%	36%
PLUMAS	6	136	141	0	40	40	0%	29%	28%
SACRAMENTO	58	0	58	10	0	10	17%	n/a	17%
SAN BENITO	17	977	993	6	297	303	36%	30%	31%
SAN BERNARDINO	0	0	0	0	0	0	n/a	n/a	n/a
SAN FRANCISCO	6,041	0	6,041	1,121	0	1,121	19%	n/a	19%
SAN JOAQUIN	11,168	1,010	12,179	2,761	398	3,159	25%	39%	26%
SAN LUIS OBISPO	1,556	2,250	3,806	146	383	529	9%	17%	14%
SAN MATEO	6,534	0	6,534	1,370	0	1,370	21%	n/a	21%
SANTA BARBARA	4,191	339	4,530	299	16	315	7%	5%	7%
SANTA CLARA	15,033	638	15,671	3,703	157	3,860	25%	25%	25%
SANTA CRUZ	2,783	1	2,784	425	0	425	15%	0%	15%
SHASTA	550	672	1,221	155	154	309	28%	23%	25%
SIERRA	0	12	12	0	4	4	0%	34%	34%
SISKIYOU	0	1	1	0	0	0	n/a	0%	0%
SOLANO	6,974	0	6,974	1,814	0	1,814	26%	n/a	26%
SONOMA	5,380	364	5,743	1,228	89	1,317	23%	24%	23%
STANISLAUS	6	1,304	1,310	1	324	325	16%	25%	25%
SUTTER	2,060	0	2,060	452	0	452	22%	0%	22%
TEHAMA	2	1,587	1,588	2	261	263	130%	16%	17%
TRINITY	0	64	64	0	0	0	n/a	0%	0%
TULARE	104	1,288	1,391	6	122	128	6%	9%	9%
TUOLUMNE	0	740	740	0	202	202	n/a	27%	27%
YOLO	2,964	0	2,964	713	0	713	24%	0%	24%
YUBA	1,591	15	1,606	390	8	398	25%	54%	25%
Total	**136,852**	**37,367**	**174,219**	**29,934**	**6,718**	**36,652**	**22%**	**18%**	**21%**

[1] Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.

	A	B	C	D	E	F	G	H
1	**FERA Table 6 - FERA Recertification Results**							
2	**Pacific Gas and Electric Company**							
3	**Program Year 2022 Annual Report**							
4								
5	**2022**	**Total FERA Households**	**Households Requested to Recertify [1]**	**% of Households Total (C/B)**	**Households Recertified [2] [5]**	**Households De-enrolled [3]**	**Recertification Rate % [4] (E/C)**	**% of Total Households De-enrolled (F/B)**
6	January	39,800	1,343	3.4%	485	858	36%	2.16%
7	February	39,689	1,471	3.7%	514	957	35%	2.41%
8	March	39,907	3,669	9.2%	1,214	2,455	33%	6.15%
9	April	39,730	2,860	7.2%	853	2,007	30%	5.05%
10	May	39,278	1,485	3.8%	497	988	33%	2.52%
11	June	38,948	1,413	3.6%	988	425	70%	1.09%
12	July	36,643	1,545	4.2%	674	871	44%	2.38%
13	August	36,324	1,324	3.6%	526	798	40%	2.20%
14	September	36,961	891	2.4%	287	604	32%	1.63%
15	October	36,770	561	1.5%	154	407	27%	1.11%
16	November	36,873	551	1.5%	211	340	38%	0.92%
17	December	36,652	722	2.0%	287	435	40%	1.19%
18	**YTD**	**36,652**	**17,835**	**48.66%**	**6,690**	**11,145**	**38%**	**30.41%**
19	[1] Excludes count of customers recertified through the probability model.							
20	[2] Recertification results are tied to the month initiated.							
21	[3] Includes customers who did not respond or who requested to be de-enrolled.							
22	[4] Percentage of customers recertified compared to the total participants requested to recertify in that month.							

FERA Table 7 - FERA Capitation Contractors
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Contractor Name [1]	Contractor Type (Check one or more if applicable)				Enrollments [2]			Total Expenditures
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
Amador-Tuolumne Community Action Agency		x		x	0	0	0	$ -
Arriba Juntos		x			0	0	0	$ -
Breathe California		x			0	0	0	$ -
Catholic Daisies of Fresno		x			0	0	0	$ -
Central Coast Energy Services Inc		x		x	0	0	0	$ -
Cesar A Moncada DBA Moncada Outreach		x			0	3	3	$ 90
Child Abuse Prevention Council of San Joaquin County		x			0	0	0	$ -
Community Action Marin		x		x	0	0	0	$ -
Community Action Partnership of Madera County		x		x	0	0	0	$ -
Community Resource Project Inc		x		x	0	0	0	$ -
El Puente Comunitario		x			0	0	0	$ -
Human Investment Project Housing Inc (HIP)		x			0	0	0	$ -
Independent Living Center of Kern County Inc		x			0	0	0	$ -
Interfaith Food Bank & Thrift Store of Amador County		x			0	0	0	$ -
KidsFirst		x			0	0	0	$ -
Kings Community Action Organization Inc		x		x	0	0	0	$ -
Merced County Community Action Agency		x		x	0	0	0	$ -
National Asian American Coalition		x			0	0	0	$ -
North Coast Energy Services, Inc		x			0	0	0	$ -
Resources for Independence Central Valley		x			0	0	0	$ -
Sacred Heart Community Service		x		x	0	1	1	$ 30
UpValley Family Centers		x			0	0	0	$ -
Valley Clean Air		x			0	0	0	$ -
West Valley Community Services		x			0	0	0	$ -
Total Enrollments and Expenditures					**0**	**4**	**4**	**$ 120**

[1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.

[2] Enrollments reflect new enrollments only.

FERA Table 8 - FERA Average Monthly Usage & Bill
Pacific Gas and Electric Company
Program Year 2022 Annual Report

Average Monthly Electric Usage
Residential Non-FERA vs. FERA Customers

Customer	Electric KWh Tier 1	Electric KWh Tier 2 and Above	Total
Non-FERA	147	307	454
FERA	206	404	611

Average Monthly Electric Bill
Residential Non-FERA vs. FERA Customers [1]
(Dollars per Customer)

Customer	Electric	
Non-FERA	$109.68	
FERA	$139.18	

[1] Excludes master-meter usage.

8. Appendix B: PG&E's 2022 Common Area Measures Treatment Photos

Pacific Gas and Electric Company | Program Year 2022
Appendix B: PG&E's Common Area Measures Treatment Photos
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Project: Woodcreek Terrace

- **Location:** Roseville, CA
- **Characteristics:** 11 Buildings, 104 Units
- **Resident Type:** Senior Housing

ESA Common Area Measures

Description

> Smart Thermostats (2)
> High Efficiency Water Heaters (2)

Savings and Benefits

> Reduce energy usage and lifecycle costs by upgrading to more efficient equipment
> Improves resident comfort and access to reliable hot water

ESA CAM Incentive Amount
$25,200.94

Estimated 1st Year ESA CAM Bill Savings*
$1,689.71

ESA In-Unit Incentive Amount
$34,217.70

Pacific Gas and Electric Company | Program Year 2022
Appendix B: PG&E's Common Area Measures Treatment Photos
Page 2 of 2

Post-Installation – DHW Storage Tank

(captured during contractor installation)

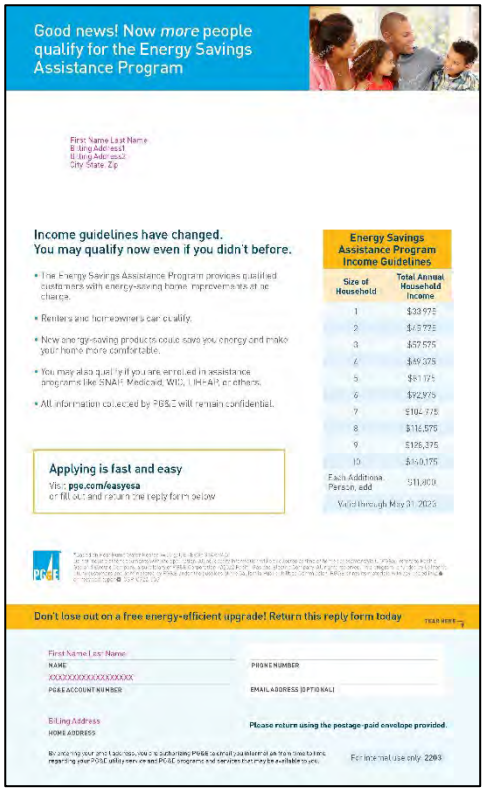
Post-Installation – Smart Thermostat

(captured during contractor installation)

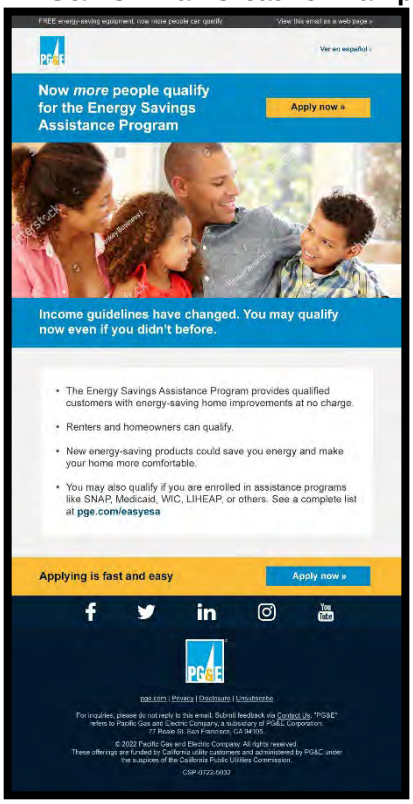
9. Appendix C: PG&E's 2022 ESA Marketing Materials

Pacific Gas and Electric Company | Program Year 2022
Appendix C: ESA Marketing Materials
Page 1 of 2

2022 PG&E's Direct Mail Example



2022 PG&E's Email Creative Example



2022 PG&E's Bill Insert Example

Pacific Gas and Electric Company | Program Year 2022
Appendix C: ESA Marketing Materials
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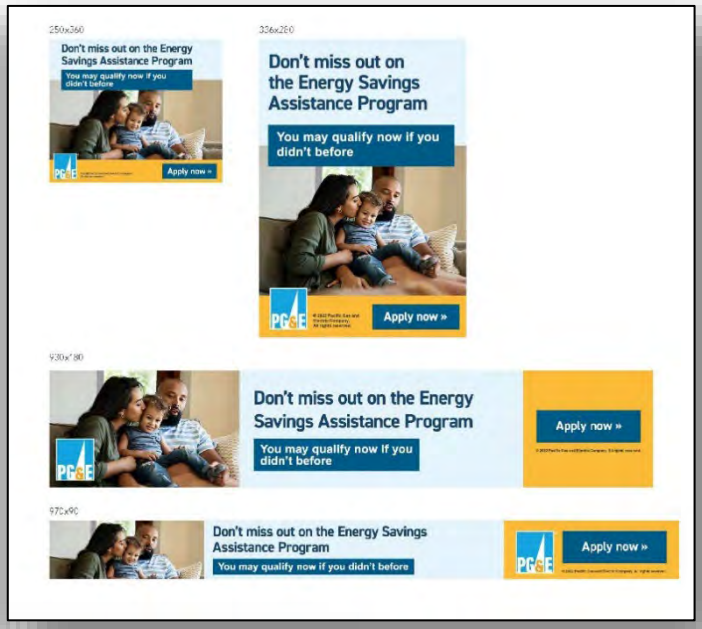
2022 PG&E's 2022 Digital Media Examples



10. Appendix D: PG&E's 2022 Energy-Water Coordination Program Report

PG&E
Water-Energy Coordination Program
2022 Annual Report

Submitted to:

Pacific Gas & Electric Company
77 Beale St
San Francisco, CA 94105

Submitted by:

Richard Heath & Associates, Inc.
rhainc.com

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TABLE OF CONTENTS

1. EXECUTIVE SUMMARY

In 2022, the Pacific Gas and Electric Company's (PG&E) Water-Energy Coordination Program (WCP) completed a fourth full year of production. The program, offered in collaboration with water agencies and delivered in conjunction PG&E's Energy Savings Assistance (ESA) Program, provides water conservation assessments and measures to ESA customers in individual water agency territories. Each water agency contract is customized to meet specific agency budgets and water conservation goals. Richard Heath & Associates, Inc. (RHA) administers the program on behalf of PG&E.

Program services include:

- Evaluating toilets for retrofit qualification and for leaks
- Replacing eligible toilets
- Replacing leaking flappers
- Replacing bathroom and kitchen faucets
- Conducting outdoor water use assessments
- Performing meter checks
- Isolating leaks
- Replacing outdoor hose bibs
- Replacing sprinkler heads
- Providing water conservation education
- Delivering water conservation items such as hose nozzles, shower timers and water agency program literature

Production in the WCP experienced a slight drop in 2022 from the previous year due to a number of factors. Customer concerns over the COVID-19 virus lingered, causing some customers to be wary of allowing field staff into their homes. To address these concerns, RHA continued to ensure that COVID-19 protocols were utilized. Contractors used telephone screenings to qualify customers, minimizing in-person contact. They also wore masks and face shields, used hand sanitizer between homes, never entered a customer home if they were sick or feverish and always ensured the customers were not ill prior to entry.

The lingering impact of COVID-19 also impacted water agency revenues. Customer bill delinquencies impacted water agency revenue and discretionary dollars for conservation programs were reallocated, making it impossible to start new programs. RHA provided water agencies with grant opportunities to overcome funding barriers.

Finally, the transition of the ESA program into the new contract cycle delayed the onboarding of new program WCP contractors due to uncertainty of whether they would be serving specific regions. These issues were resolved with the establishment of the new program cycle contracts.

WATER AGENCY PARTNERS

Listed below are the ten water agency partners from 2022:

1. Alameda County Water District
2. California American Water – Oakhurst
3. California American Water – Merced
4. California American Water – Monterey
5. California American Water – Sacramento
6. California American Water – Santa Rosa
7. City of Santa Cruz Water Department
8. Solano County Water Agency
9. Sonoma Water
10. Valley Water

Combined, the service areas covered the following nine counties: Alameda, Madera, Merced, Monterey, Sacramento, Santa Clara, Santa Cruz, Solano and Sonoma.

NEW CONTRACTS EXECUTED IN 2022

- Valley Water Leak Assessment and Repair Pilot (third quarter)
- Valley Water Toilet Assessment and Retrofit Pilot (third quarter)

CONTRACT(S) RENEWED IN THE 2022

- Solano County Water Agency (third quarter)
- Alameda County Water District (third quarter)

SUCCESSES AND LESSONS LEARNED

Program achievements included:

1. **507 homes received WCP measures:**
   Collectively, these measures will achieve approximately 11,164,314 gallons in annual water savings and 12,117 kWh of embedded energy savings. In comparison, the WCP served a slightly higher number (554) of homes in 2021.

2. **The program continued to achieve high customer satisfaction rates.**
   100 percent of customers surveyed through telephone quality assurance calls were very satisfied with program services.

LESSONS LEARNED INCLUDED:

1. **Many complexities and variables continue to have an impact on the process of contracting with water partners.**
   Part of RHA's to role as the WCP administrator is to develop relationships with water agencies and establish collaborative water programs. Due to the different types encountered (municipal water retailers, water wholesalers, wastewater agencies, and water IOUs), the process to develop programs and execute contracts was in many cases complex and protracted. Some contracts required multiple layers of review and ultimately could not be launched until approved by a supervising board or council. The cycle time varied from a few months to as much as an entire year due to water agency staffing shortages, budget reductions and prioritization of other drought-related projects. Additionally, prospective partners has to overcome concerns regarding sole sourcing for large budget programs, identifying and obtaining program funding, and meeting prevailing wage criteria for publicly funded agencies. RHA provided water agencies information on solutions that have worked for other agencies to overcome barriers to program execution.

.

2. **ESA subcontractor recruitment can be challenging due to the requirements of some public agency programs.**
   Most municipal or public water agencies require installation work to be performed at a prevailing wage rate by public works contractors registered with the California Department of Industrial Relations (DIR). This can present an operational challenge to onboard WCP contractors in certain PG&E regions, particularly where the current pool of ESA subcontractors is not registered with DIR, and/or not interested in pursuing registration as a public works contractor. When this occurs, a participating ESA contractor can perform WCP enrollment and assessments; however, RHA has to engage a separate public works contractor to complete toilet retrofits and other installation work.

2. BACKGROUND

HOW THE WCP STARTED

In conjunction with work on the Water-Energy Nexus, the CPUC directed investor owned energy utilities to establish partnership frameworks with the water sector to co-fund programs that reduce energy consumption by the water sector in supplying, conveying, treating, and distributing water. In 2016, PG&E developed a plan to meet the CPUC requirement by leveraging its ESA program to deliver water conservation services co-funded by water agencies.

In 2016 and 2017, PG&E worked with two water agencies to conduct a test program that delivered water conservation offerings to PG&E ESA customers during ESA appointments (water conservation assessments, education, and measures). For PG&E, the program proved that incremental energy conservation could be achieved through the embedded energy savings of water conservation. The program also proved successful for water agencies by enabling them to leverage PG&E's existing visits to offer water conservation measures.

LAUNCHING A FULL-SCALE PROGRAM

After the success of the test program, PG&E developed the full-scale program in 2018. As part of the planning and collaboration efforts, RHA hosted a webinar for PG&E and water agencies to discuss program details. Key discussion topics included:

- Best practices and lessons learned from the test program
- How PG&E and water agencies could best work together
- Available funding for low-income programs
- Existing water conservation rebate programs
- Labor laws and potential impacts on the WCP
- Program measures and associated savings
- Number of potentially eligible homes to be served

Following the webinar, program stakeholders collaborated to identify solutions to potential problems, finalized details, and developed a detailed plan for full-scale program launch. The fully-scaled program officially launched in August 2018.

3. WATER AGENCY CONTRACTS

Each water agency contract is fully customized to deliver the services and measures that are in alignment with the agency's budget and water conservation goals. Please see the contract summaries in Table 1 below for a description of each current contract within the program.

Table 1. Summary of WCP Contracts for 2022

Contract Description	Alameda County Water District	California American Water	City of Santa Cruz Public Works	Solano County Water Agency	Sonoma Water	Valley Water
Estimated Number of ESA Homes to be Served During Current Contract Period	215	1,000	250	300	250	100
Current Contract Period	9/29/2021 - 9/30/2022	8/16/2021- 12/31/2023	7/28/2020 - 12/31/2022	7/1/2021 - 6/30/2022	7/1/2020 - 12/1/2022	7/1/2022 - 6/30/2023
Territory Served	Cities of Fremont, Newark, and Union City	Four areas in Merced, Monterey, Sacramento and Santa Rosa	City of Santa Cruz only	Solano County	6 Sanitation Districts in Sonoma County	Santa Clara County
Organization Type	Retailer	Investor-Owned Utility	Retailer	Wholesaler	Wastewater / Wholesaler	Wholesaler
Program Type	Full-Scale Direct Install Program	Full-Scale Direct Install Program	Full-Scale Direct Install Program	Full-Scale Direct Install Program	Full-Scale Direct Install Program	Two Direct Install Pilot Programs
Number of ESA Contractors Assigned	1	1	1	1	1	1

Contract Description	Alameda County Water District	California American Water	City of Santa Cruz Public Works	Solano County Water Agency	Sonoma Water	Valley Water
Program Measures Offered						
Toilet Retrofit Assessment & Leak Test	X	X	X	X	X	X
Basic Outdoor Assessment / Meter Check / Leak Location - Observe all water structures, hose bibs, and yard for leaking issues.	X	X				X
Water Agency Supplied Education	X		X			X
High-Efficiency Toilet Retrofit	X	X	X	X	X	X
Kitchen Faucet Retrofit	X					X
Bathroom Faucet Retrofit	X					X
Outdoor Hose Bib Retrofit	X					X
Sprinkler Head Replacement	X					X
Sprinkler Irrigation Valve Repair	X					X
Shower Timer		X				
Hose Nozzle		X				
Distribution of Water Agency Information / Materials	X	X	X		X	X
Flange Repair	X	X		X		X
Angle Stop Replacement	X	X		X		X
Flapper Replacement	X	X		X		X

**The 2022 goal for homes served for each water partner agency was determined using the number of anticipated customers served from each contract. Some contracts carried over from 2020 and were renewed in 2021 or 2022 with a change to the number of anticipated customers served. This explains the variance in the estimated number of customers served for the current contract period and the 2021 goal for homes served.*

ALAMEDA COUNTY WATER DISTRICT

The third quarter of 2022 was the final quarter of Alameda County Water District's second program year. The full-scale program had two primary goals: offer more low-income customers water saving measures to help reduce their water bills and conserve water for the district. Immediately after the previous contract expired, the current iteration of their full-scale program launched in October,

continuing to provide leak assessment and repair measures including bathroom and kitchen faucet replacements, hose bib and sprinkler head replacements and toilet retrofits.

CALIFORNIA AMERICAN WATER

California American Water's single-family WCP launched the first week of October 2021 and is scheduled through December 31, 2023. Most of California American Water's current WCP budget was consumed by the third quarter of 2022. Program services include toilet assessments, toilet retrofits, flange and angle stop replacements and flapper installation. Additionally, outdoor leak assessments, meter checks and giveaway items are provided for each participating customer. Collectively, this program serves five of California American Water's districts in PG&E territory: Oakhurst, Merced, Monterey, Sacramento and Santa Rosa.

CITY OF SANTA CRUZ WATER DEPARTMENT

The City of Santa Cruz Water Department extended their contract in July of 2021 through December 2022. The current iteration was expanded from serving exclusively multifamily customer to include single-family homes. Program services included toilet assessments, toilet retrofits, flange and angle stop replacements and water conservation giveaway items. After a long period of inactivity, the city decided to sunset the program in December of 2022 and focus on customer outreach to promote conservation efforts.

SOLANO COUNTY WATER AGENCY

Solano County renewed their WCP contract in July of 2022. Due to increased demand and past program performance, the water wholesaler increased their water conservation budget from the previous year and set a goal of serving approximately 300 customers. This program focuses on toilet retrofits for customers located in urban and disadvantaged areas throughout Solano County.

SONOMA WATER

Sonoma Water is the water wholesaler for the majority of Sonoma County. There are six water retailers within the County. Sonoma Water also fully funds wastewater treatment through six sanitation districts throughout the County. Sonoma Water has full discretion of the funding for the sanitation districts, and they have funded a direct install toilet pilot program that targets approximately 300 customers in these sanitation districts. Throughout 2022, the program experienced a period of inactivity. This was primarily due to the difficulty that contractors had in identifying eligible customers. As a water wholesaler comprised of sanitation zones, Sonoma Water can only provide a list of sites with street addresses and Assessor's Parcel Numbers, as this is the only information available. All customers were required to be vetted against this list prior to offering program services. Program services included toilet assessments, toilet retrofits, flange repairs and angle stop replacements. As this contract expired in December of 2022, Sonoma Water was exploring grant opportunities to partner with RHA on a variety of water conservation programs for disadvantaged groups.

VALLEY WATER

In July of 2022, Valley Water launched two pilot programs offering both leak assessment and repair services and toilet retrofits. Program services included toilet assessments, toilet retrofits, flange repairs, angle stop replacements, bathroom and kitchen faucet replacements, hose bib and sprinkler head replacements and toilet retrofits. ESA contractor recruitment in Santa Clara County contributed to a long ramp-up period that carried over into the third and fourth quarters of 2022. Valley Water will support the program through coordinated outreach activities with six water retailers in their area.

4. BUDGET

PG&E provided RHA with a budget of $75,000 in the 2022 to continue the water partner recruitment and contract process. The strategy for 2022 was to front load water agency outreach, proposals, and contract negotiations in the first half of the year. This approach was especially helpful when working with municipal water agencies, many of whom operate on a July – June fiscal year, making first and second quarter engagement critical.

WATER AGENCY CONTRIBUTION

The growth in the WCP from its launch in August of 2018 has been substantial. Many programs began as small pilots and later evolved into larger, full-scale programs with substantially larger investments once program success was proven. In 2022, water agencies contributed $199,555 for the delivery of WCP water coordination services.

5. PRODUCTION

HOMES SERVED

In 2022, services funded by the six water agency partners were delivered to 507 homes through nine programs. In the beginning of the calendar year, contractors continued to encounter ongoing challenges from the previous year in gaining customer trust due to concerns about COVID-19. Program production was also affected by turnover among the remaining ESA contractors.

A summary of homes served by agency is illustrated in Table 2.

Table 2. Total Homes Served in 2022

Agency	Total Homes Served
Alameda County Water District	160
California American Water, Merced	20
California American Water, Monterey	74
California American Water, Sacramento	118
California American Water, Santa Rosa	14

Agency	Total Homes Served
City of Santa Cruz	4
Solano County Water Agency	117
Sonoma Water	0
Valley Water	0
Total Homes Served	**507**

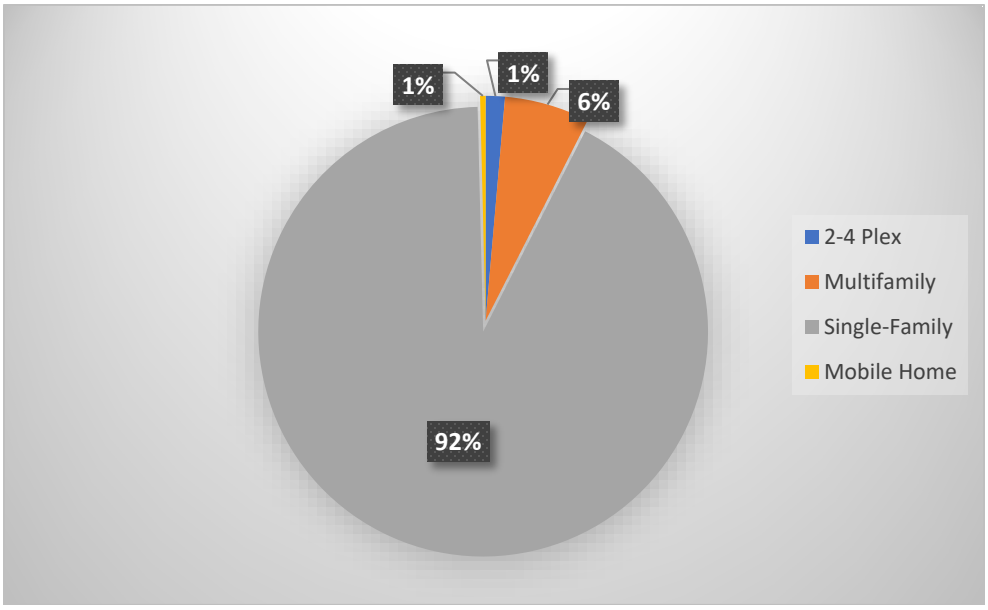
HOME TYPE

Four different types of homes were served by WCP contractors in 2022, as shown below in Table 4 and Figure 1.

Table 3. WCP Home Types Served by Agency in 2022

	Single Family	Multifamily	Mobile Home	2-4 Plex
Alameda County Water District	125	30	1	4
California American Water (all five districts)	226	0	0	0
City of Santa Cruz	2	0	1	1
Solano County Water Agency	114	1	0	2
Sonoma Water	0	0	0	0
Valley Water	0	0	0	0
Totals	**467**	**31**	**2**	**7**

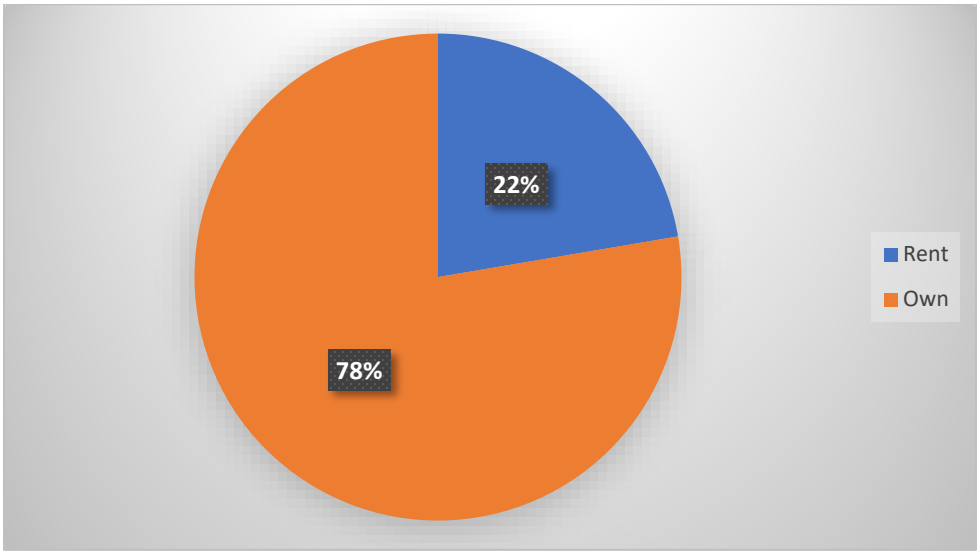
Figure 1. Homes Served by Type in 2022



RENTER VS. OWNER

Figure 2 below shows the percentages of renter occupied versus owner occupied homes served in 2022.

Figure 2. Renters Vs. Owners in 2022



MEASURES SERVED

A summary of WCP measures served in 2022 is provided below in Table 5.

Table 4. WCP Measures Served by Agency in 2022

Measures Served	Alameda County Water District	California American Water, Merced	California American Water, Monterey	California American Water, Oakhurst	California American Water, Sacramento	California American Water, Santa Rosa	City of Santa Cruz	Solano County Water Agency	Sonoma Water	Totals
Toilet Dye Test / Assessment	328	40	146	13	242	36	4	239	0	1048
Toilet Retrofits	131	35	65	10	122	20	1	70	0	454
Leak Assessments + Meter Check	154	20	73	6	114	14	NA	NA	0	381
Shower Timers	NA	40	148	12	226	28	NA	NA	0	454
Hose Nozzles	NA	20	74	6	113	14	NA	NA	0	227
Other Giveaway Items	NA	20	74	6	113	14	NA	NA	0	227
Angle Stop Replacements	7	0	3	1	8	0	0	5	0	24
Flange Repairs	3	5	4	0	1	1	0	2	0	16
Flapper Replacements	2	3	1	0	2	0	0	0	0	8
Bathroom Faucet Retrofits	13	NA	NA	NA	NA	NA	NA	NA	0	13
Kitchen Faucet Retrofits	4	NA	NA	NA	NA	NA	NA	NA	0	4
Outdoor Hose Bib Retrofits	14	NA	NA	NA	NA	NA	NA	NA	0	14
Water Education and or Agency Literature	142	NA	NA	NA	NA	NA	4	NA	0	146
Referral for Additional Services	NA	NA	NA	NA	NA	NA	NA	NA	0	0

DIFFERENCES IN PRODUCTION FROM 2021 TO 2022

In 2022, the number of homes served and average water agency-leveraged dollars per home was comparable to the previous year.

Table 5. Production Variances from 2021 to 2022

	2021	2022
Homes Served	554	507
Leveraged Funding	$206,685	$199,555
Average Cost / Home	$373.07	$393.60

6. QUALITY CONTROL

RHA performed two primary quality control activities to ensure positive customer experiences:

Telephone Quality Assurance Calls: A minimum of 5% of customers served were contacted to inquire about their experience after receiving toilet retrofit services. Customers were asked questions about the contractor representative who provided the service and their professionalism, customer satisfaction with installed measures, and overall satisfaction with the program. In 2022, 33 customers received quality assurance calls. 100 percent of customers surveyed were satisfied with the program.

Installation Photo Review: Contractors serving the WCP are required to take careful "before" photos prior to toilet removal. They must show the date stamp and gallons per flush in the photo and the surrounding subfloor to ensure it qualifies for a program retrofit. Once the new toilet is installed, an "after" photo is taken that will demonstrate installation standards were met. All photos are reviewed by RHA's program management team prior to approval for contractor reimbursement.

Contractor ride-alongs are generally a standard part of the WCP quality control process; however, due to COVID-19 safety issues, no ride-alongs were conducted in 2022.

7. SAVINGS

The WCP achieved excellent water and embedded energy savings in 2022. Calculated savings can be seen below in Table 8.

Table 6. 2022 Water and Energy Savings

Measure	# of Measures Installed	Water Savings in (gallons / year)	Embedded Energy Savings (kWh)
0.8 gpf High Efficiency Toilet	454	9,080,000	8,190
Shower Timer	454	1,471,414	3,310
Hose Nozzles	227	612,900	617
Total Savings in 2022		**11,164,314**	**12,117**

Note: The above savings were calculated using data from the CPUC Water / Energy Calculator documented in the Water Energy Nexus workpaper.

8. LOOKING FORWARD TO 2023

As the WCP moves into 2023, there will be several notable changes that will affect program production:

- The contract for the California American Water Statewide Single-Family program was executed at the end of the third quarter of 2021 and will run through 2023. Thanks to strong production in 2022, much of the program budget has been consumed, leaving less work to be completed in 2023.

- The California American Water is awaiting regulatory approval to implement at statewide multifamily program. RHA will work with the ESA Northern Multifamily Whole Building Program administrator to coordinate program services.

- A long anticipated contract with the City of Fresno contract will launch in March 2023. This six-month pilot will serve an estimated 250 customers and may be a precursor to a longer, full-scale program.

- The Department of Water Resources' Urban Community Drought Relief Program provides funding for activities including residential water conservation. It is anticipated that one or more water agencies may receive funding for a WCP, clearing away one of the most common hurdles: a lack of internal funds available.

- The Bipartisan Infrastructure Law also provides funding for water efficiency projects and may serve as a catalyst for additional water agencies to participate in WCP.

11. Appendix E: PG&E's 2022 CARE Marketing Materials

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Appendix E: CARE Marketing Materials
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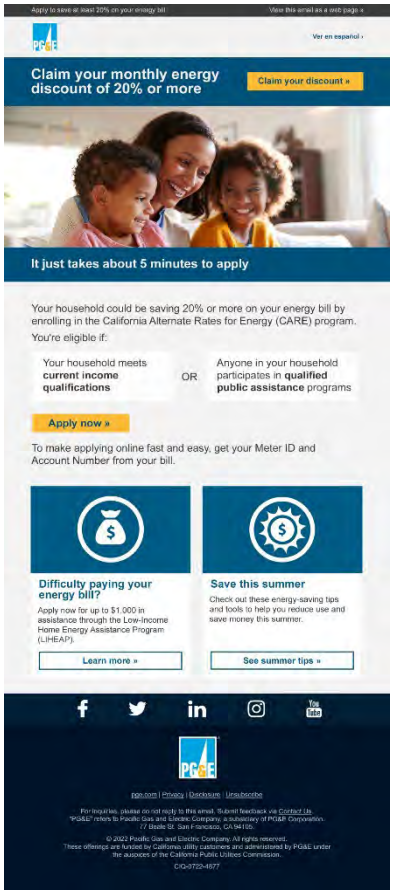
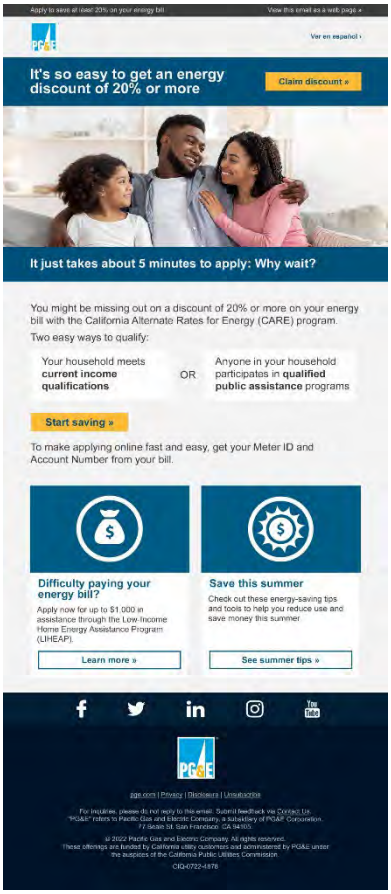
CARE Acquisition Email Samples – Touch 1, Touch 2 and Touch 3





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CARE Failed to Recertify Acquisition Email Sample

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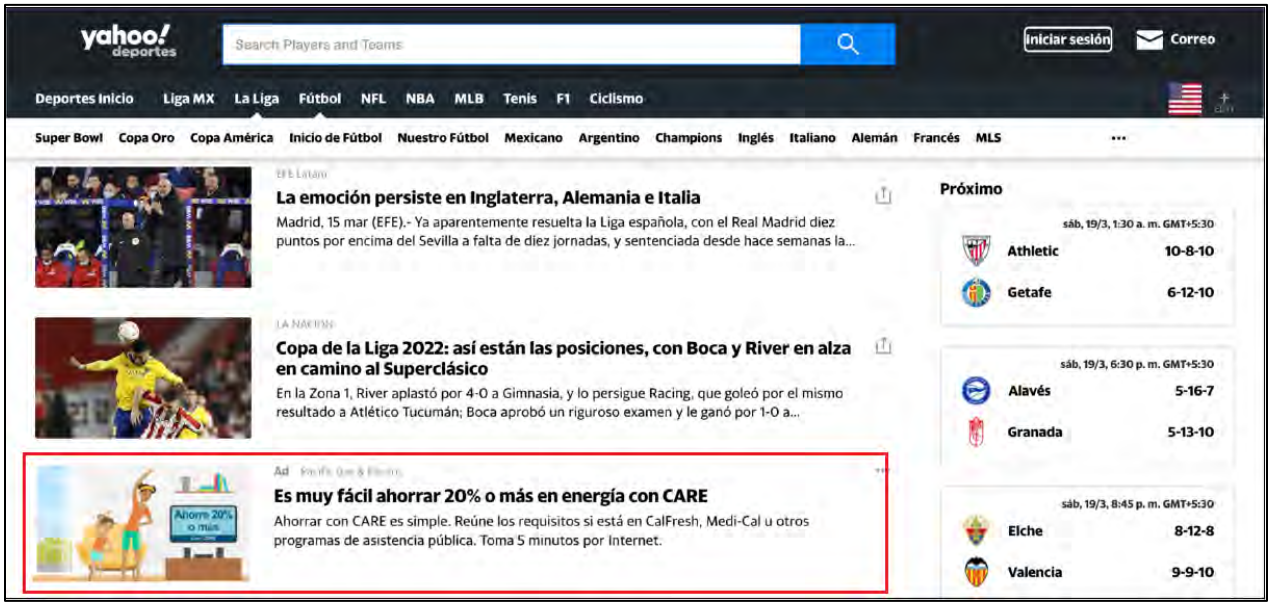
CARE Native Ad Samples (English and Spanish)



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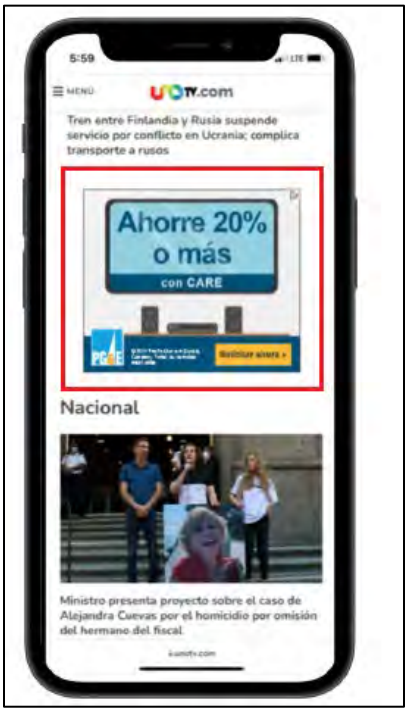
CARE Display Ad Samples (English and Spanish)



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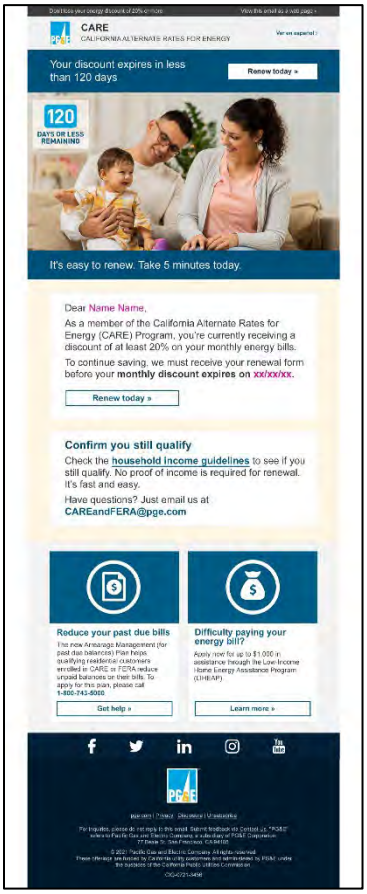
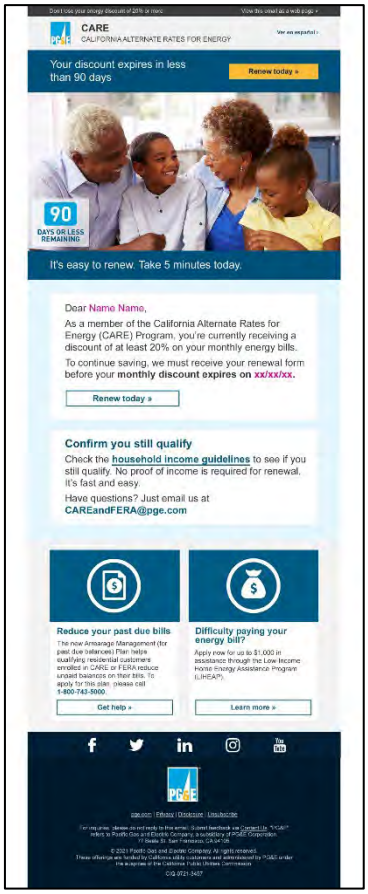
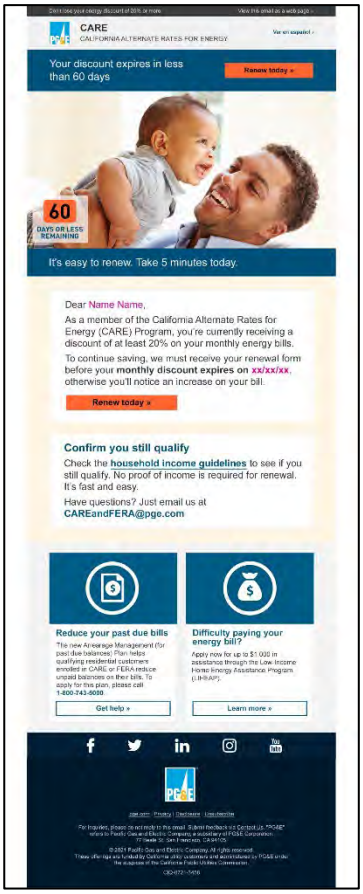
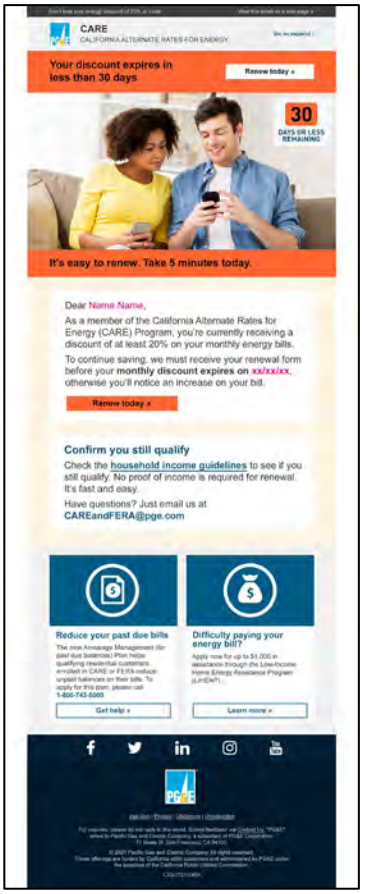
CARE Recertification Reminder Email Samples









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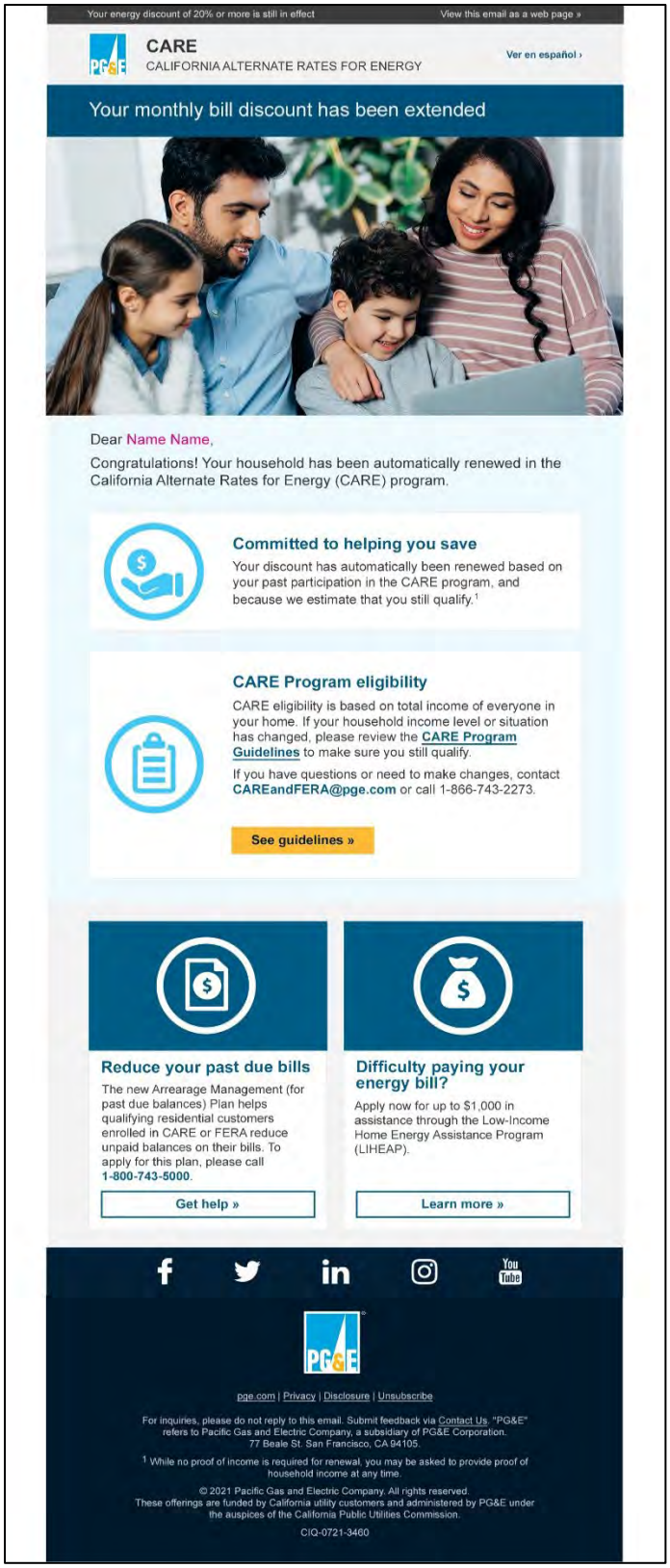
CARE Auto-Recertification Email Sample



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Appendix E: CARE Marketing Materials
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CARE/FERA Bill Insert Sample

CARE Program
California Alternate Rates for Energy
pge.com/care • 1-866-743-2273
Offers a monthly discount on energy bills for qualifying households.

FERA Program
Family Electric Rate Assistance
pge.com/fera • 1-800-743-5000
Offers a monthly discount on electric bills for households of three or more people with a slightly higher income than required for CARE.

Email: CAREandFERA@pge.com

Programa CARE
California Alternate Rates for Energy
pge.com/care-es • 1-866-743-2273
Ofrece un descuento mensual en las facturas de energía a los hogares que reúnan los requisitos de ingresos.

Programa FERA
Family Electric Rate Assistance
pge.com/fera-es • 1-800-660-6789
Ofrece un descuento mensual en las facturas de electricidad a familias de tres o más personas que reciban un ingreso ligeramente más alto que el requerido para CARE.

Email: CAREandFERA@pge.com

¿Es su plan actual de tarifas el más adecuado para su consumo de energía?

Program Income Guidelines (good until May 31, 2023) • Requisitos de ingreso del programa (válido hasta el 31 de mayo, 2023)

Total Gross Annual Household Income* / Ingreso bruto total anual del hogar*		1-2	3	4	5	6	7	8	Each additional person
	CARE	$36,620	$46,060	$55,500	$64,940	$74,380	$83,820	$93,260	$9,440
	FERA	Not Eligible	$46,061–$57,575	$55,501–$69,375	$64,941–$81,175	$74,381–$92,975	$83,821–$104,775	$93,261–$116,575	$9,440–$11,800

PG&E

NO POSTAGE NECESSARY IF MAILED IN THE UNITED STATES

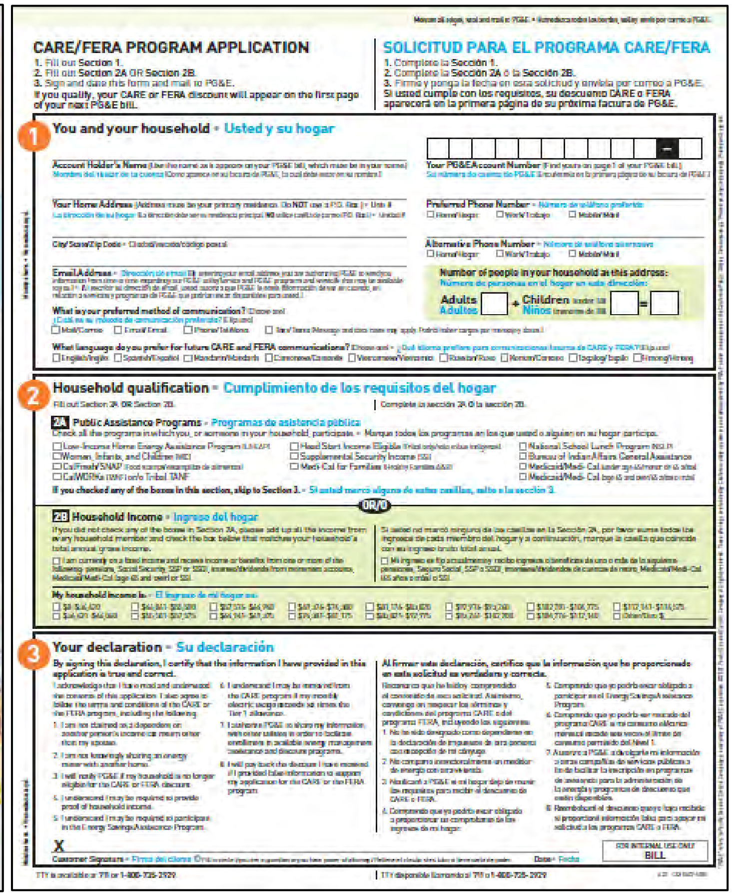
BUSINESS REPLY MAIL
FIRST-CLASS MAIL PERMIT NO. 29196 SAN FRANCISCO, CA
POSTAGE WILL BE PAID BY ADDRESSEE
PACIFIC GAS AND ELECTRIC COMPANY
CARE/FERA PROGRAM
P.O. BOX 7979
SAN FRANCISCO, CA 94120-9485

Customers can help lower their energy bills by at least 18% with CARE and FERA programs

NEW income guidelines effective June 1. See if you qualify.

Los clientes pueden ayudar a reducir sus facturas de energía en al menos un 18% con los programas CARE y FERA

NUEVAS pautas de ingreso efectivas al 1 de junio.



CARE/FERA PROGRAM APPLICATION
1. Fill out Section 1.
2. Fill out Section 2A OR Section 2B.
3. Sign and date this form and mail to PG&E.
If you qualify, your CARE or FERA discount will appear on the first page of your next PG&E bill.

SOLICITUD PARA EL PROGRAMA CARE/FERA
1. Complete la Sección 1.
2. Complete la Sección 2A ó la Sección 2B.
3. Firme y ponga la fecha en esta solicitud y envíela por correo a PG&E.
Si usted cumple con los requisitos, su descuento CARE o FERA aparecerá en la primera página de su próxima factura de PG&E.

1 You and your household • Usted y su hogar

Account Holder's Name • Nombre del titular de la cuenta
Your PG&E Account Number • Su número de cuenta de PG&E
Your Home Address • La dirección de su hogar
Preferred Phone Number • Número de teléfono preferido
☐ Home/Hogar ☐ Work/Trabajo ☐ Mobile/Móvil
City/State/Zip Code • Ciudad/estado/código postal
Alternative Phone Number • Número de teléfono alternativo
☐ Home/Hogar ☐ Work/Trabajo ☐ Mobile/Móvil
Email Address • Dirección de email
Number of people in your household at this address: • Número de personas en el hogar en esta dirección:
Adults / Adultos ☐ + Children / Niños ☐ = ☐
What is your preferred method of communication? • ¿Cuál es su método de comunicación preferido?
☐ Mail/Correo ☐ Email/Email ☐ Phone/Teléfono ☐ Text/Texto
What language do you prefer for future CARE and FERA communications? • ¿Qué idioma prefiere para comunicaciones futuras de CARE y FERA?
☐ English/Inglés ☐ Spanish/Español ☐ Mandarin/Mandarín ☐ Cantonese/Cantonés ☐ Vietnamese/Vietnamita ☐ Russian/Ruso ☐ Korean/Coreano ☐ Tagalog/Tagalo ☐ Hmong/Hmong

2 Household qualification • Cumplimiento de los requisitos del hogar
Fill out Section 2A OR Section 2B. | Complete la sección 2A O la sección 2B.

2A Public Assistance Programs • Programas de asistencia pública
Check all the programs in which you, or someone in your household, participate. • Marque todos los programas en los que usted o alguien en su hogar participa.
☐ Low-Income Home Energy Assistance Program (LIHEAP)
☐ Women, Infants, and Children (WIC)
☐ CalFresh/SNAP
☐ CalWORKs (TANF) or/o Tribal TANF
☐ Head Start Income Eligible
☐ Supplemental Security Income (SSI)
☐ Medi-Cal for Families
☐ National School Lunch Program (NSLP)
☐ Bureau of Indian Affairs General Assistance
☐ Medicaid/Medi-Cal
☐ Medicaid/Medi-Cal
If you checked any of the boxes in this section, skip to Section 3. • Si usted marcó alguna de estas casillas, salte a la sección 3.

OR/O

2B Household Income • Ingreso del hogar
My household income is: • El ingreso de mi hogar es:

3 Your declaration • Su declaración
By signing this declaration, I certify that the information I have provided in this application is true and correct.
Al firmar esta declaración, certifico que la información que he proporcionado en esta solicitud es verdadera y correcta.

X
Customer Signature • Firma del cliente
Date • Fecha
FOR INTERNAL USE ONLY
BILL

12. Appendix F: PG&E's 2022 FERA Marketing Materials

Pacific Gas and Electric Company | Program Year 2022
Appendix F: FERA Marketing Materials
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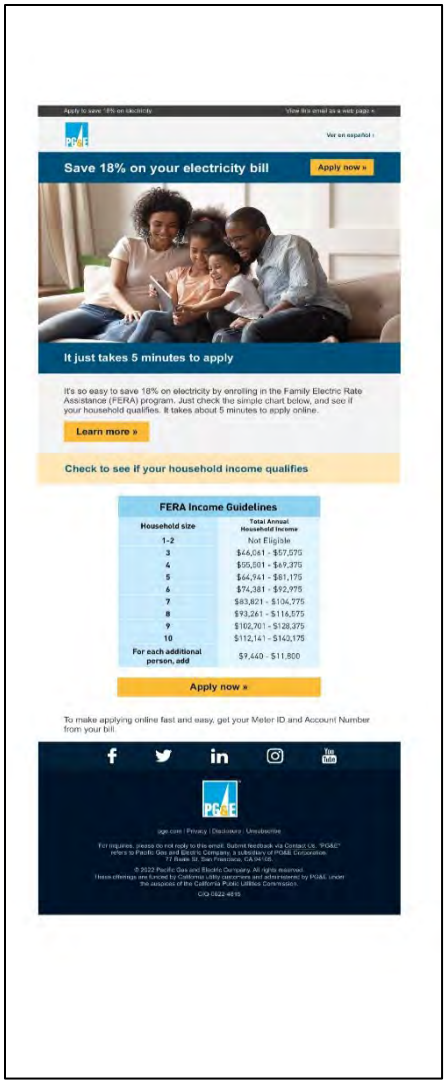
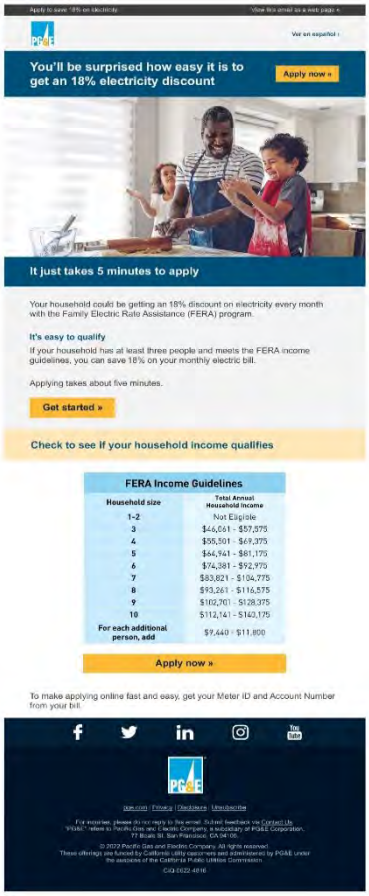
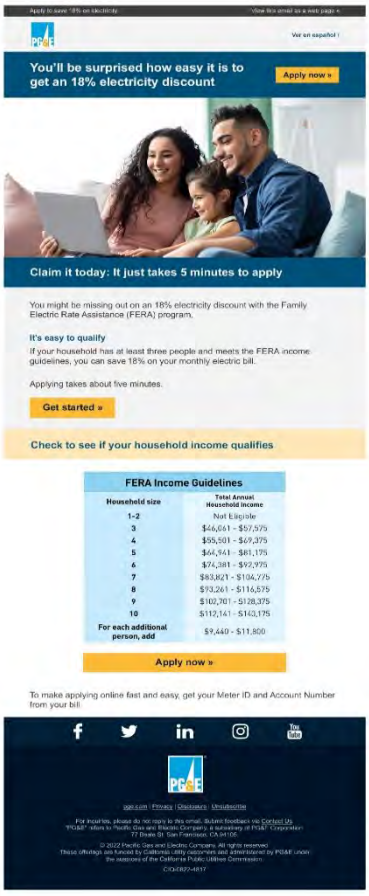
FERA Acquisition Email Samples – Touch 1, Touch 2 and Touch 3







Pacific Gas and Electric Company | Program Year 2022
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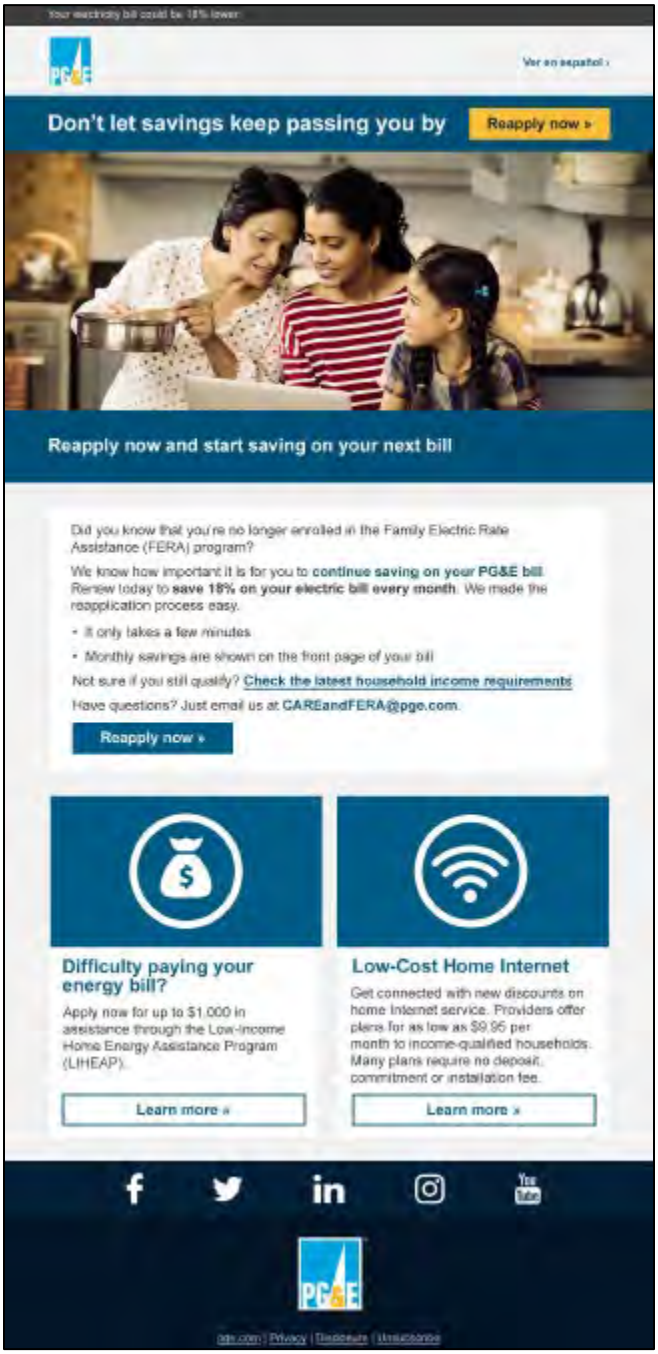
FERA Failed to Recertify Acquisition Email Sample



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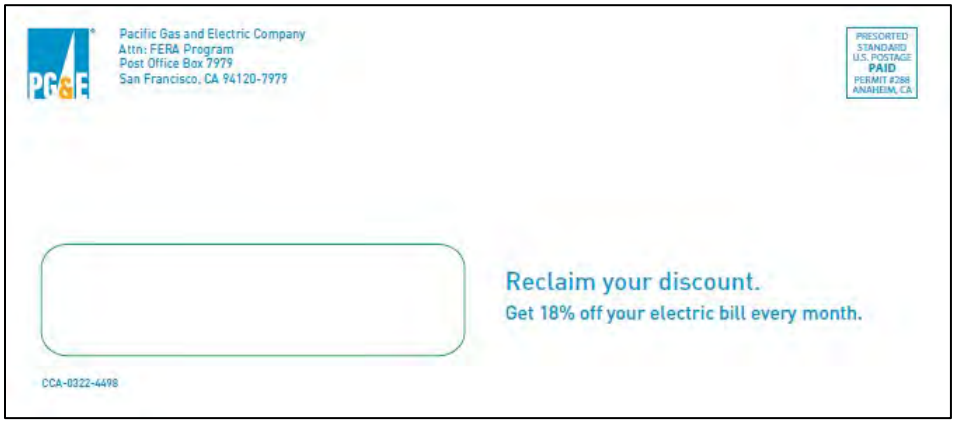
FERA Failed to Recertify Acquisition Direct Mail Sample



Renew now to get your monthly FERA discount again

John Q. Sample
Address 1
Address 2
City, State, ZIP

You'll get 18% off your electric bill every month:
Go to pge.com/FERArenewal

June 7, 2019

Dear [Name],

Start saving again with FERA

You're no longer enrolled in the Family Electric Rate Assistance (FERA) program, and we know how important it is for you to continue saving. As a member of the FERA program, you previously received an 18% monthly discount on your Pacific Gas and Electric Company (PG&E) electric bills. Reapply to start getting your discount again.

Reapplying is easy

Answer a few simple questions and join more than 1.5 million customers who already benefit from PG&E discount programs.

Online: Go to pge.com/FERArenewal for the fastest option.
Phone: Call us at 1-866-743-2273 and we'll walk you through it.
Mail: Fill out the enclosed application and return it to PG&E.

Your account number is: 0123456789-1. You'll need this for the application.

Have questions or need help filling out the application? Just email us at CAREandFERA@pge.com

Sincerely,

Your PG&E Customer Program Team

P.S. You can also help family, friends and neighbors who may qualify by referring them to pge.com/careferadiscount. For additional information about financial assistance and support available, including programs like low-cost internet and discounts on home or mobile phone service, go to pge.com/billhelp.

Pacific Gas and Electric Company | Program Year 2022
Appendix F: FERA Marketing Materials
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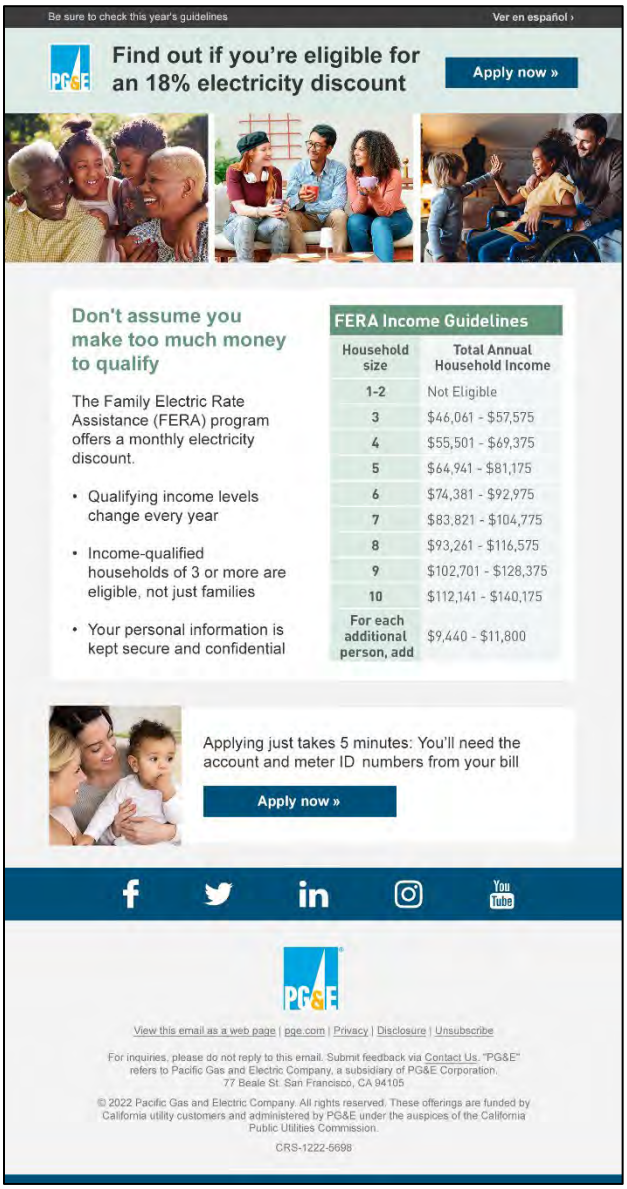
FERA Non-Responder Email Sample



Be sure to check this year's guidelines

Ver en español ›

Find out if you're eligible for an 18% electricity discount

Apply now »

Don't assume you make too much money to qualify

The Family Electric Rate Assistance (FERA) program offers a monthly electricity discount.

- Qualifying income levels change every year
- Income-qualified households of 3 or more are eligible, not just families
- Your personal information is kept secure and confidential

FERA Income Guidelines

Household size	Total Annual Household Income
1-2	Not Eligible
3	$46,061 - $57,575
4	$55,501 - $69,375
5	$64,941 - $81,175
6	$74,381 - $92,975
7	$83,821 - $104,775
8	$93,261 - $116,575
9	$102,701 - $128,375
10	$112,141 - $140,175
For each additional person, add	$9,440 - $11,800

Applying just takes 5 minutes: You'll need the account and meter ID numbers from your bill

Apply now »

View this email as a web page | pge.com | Privacy | Disclosure | Unsubscribe

For inquiries, please do not reply to this email. Submit feedback via Contact Us. "PG&E" refers to Pacific Gas and Electric Company, a subsidiary of PG&E Corporation.
77 Beale St. San Francisco, CA 94105

CRS-1222-5698

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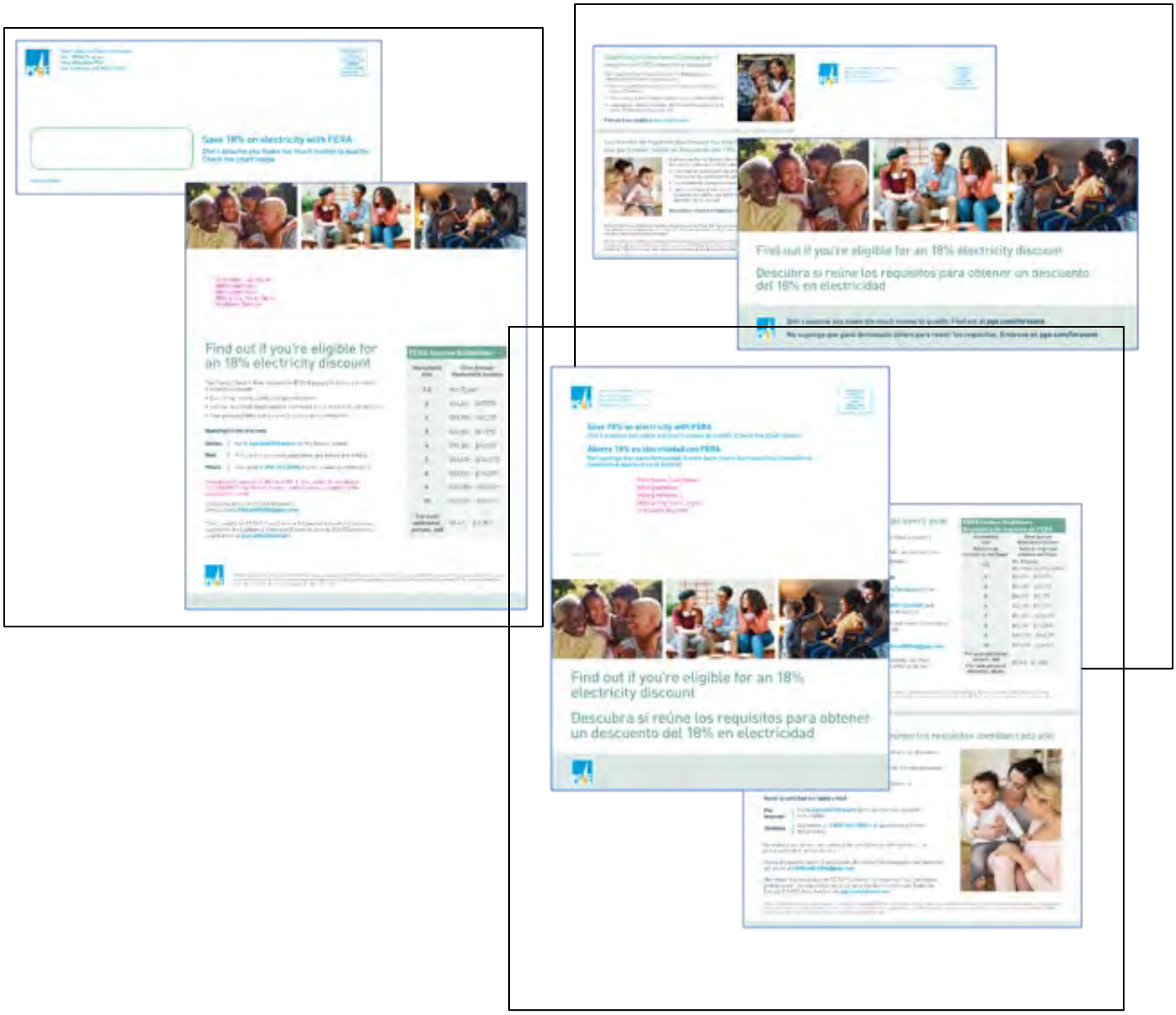
FERA Non-Responder Direct Mail Samples



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Appendix F: FERA Marketing Materials
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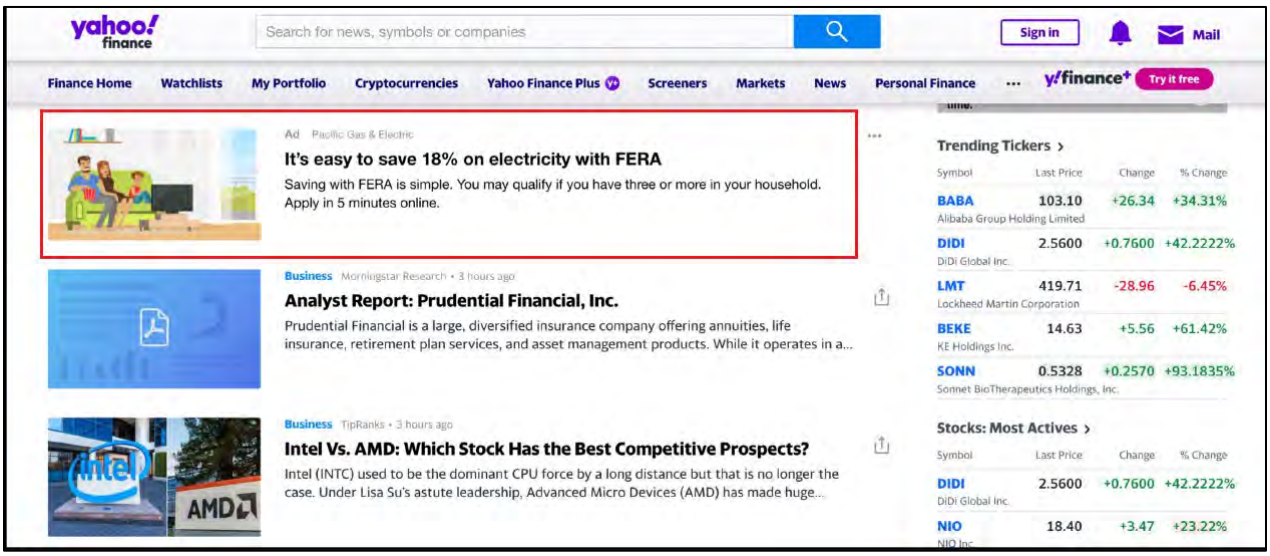
FERA Native Ad Samples (English and Spanish)



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Appendix F: FERA Marketing Materials
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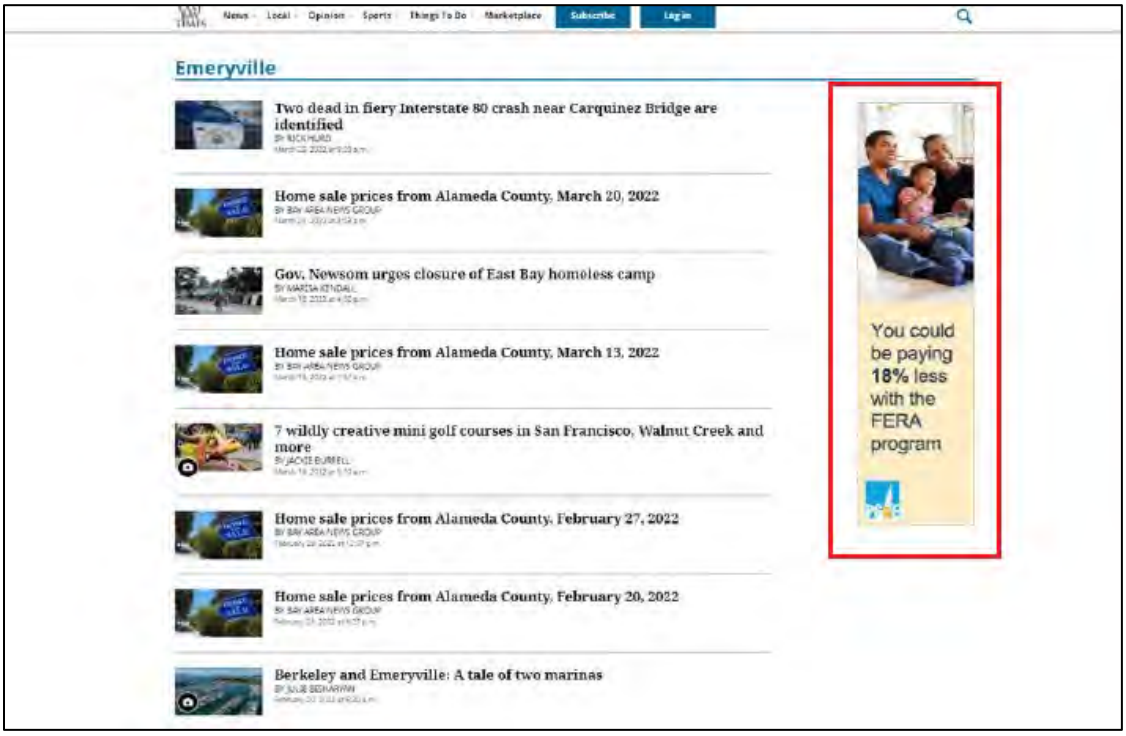
FERA Display Ad Samples (English and Spanish)



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Appendix F: FERA Marketing Materials
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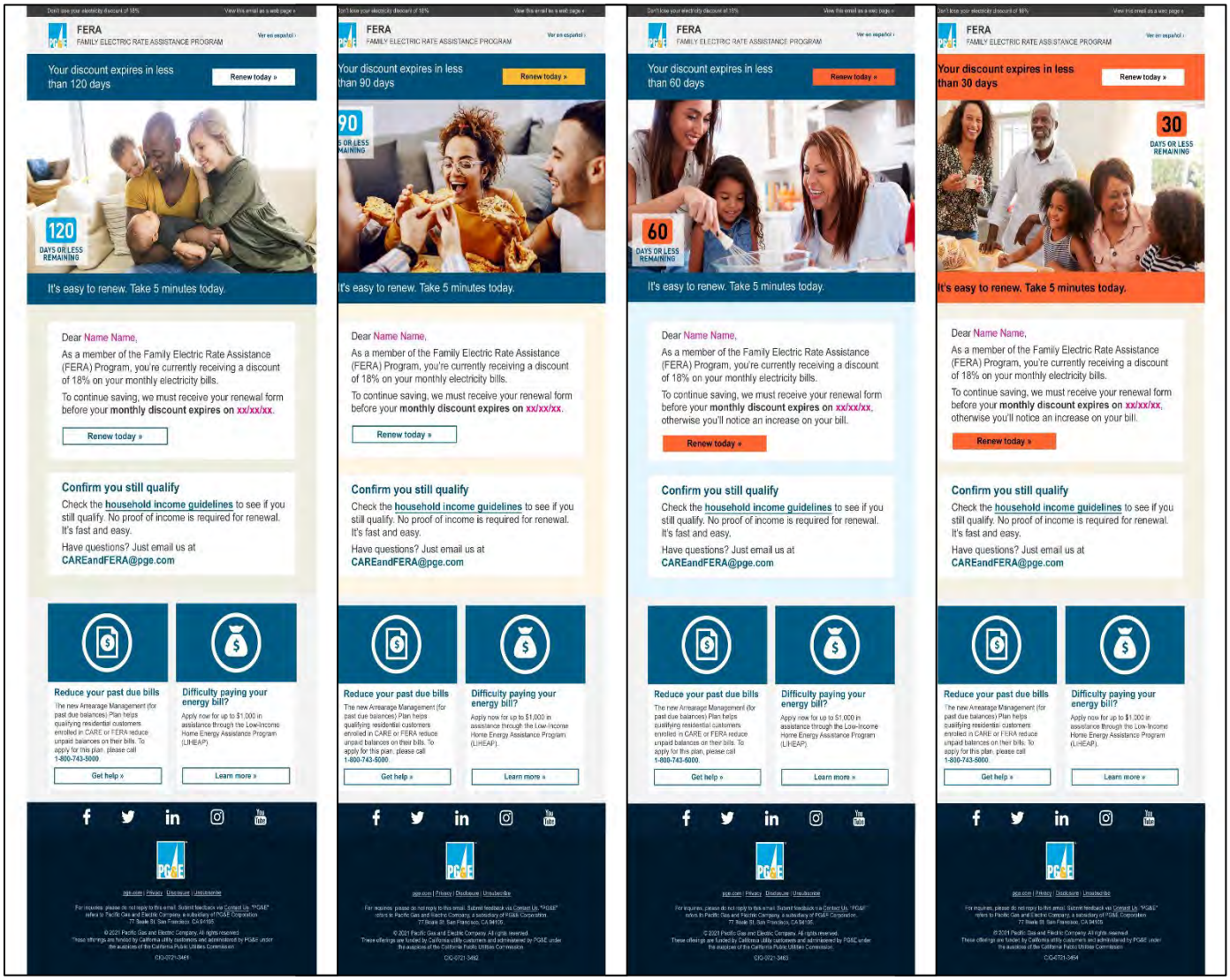
FERA Recertification Reminder Email Samples



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Appendix F: FERA Marketing Materials
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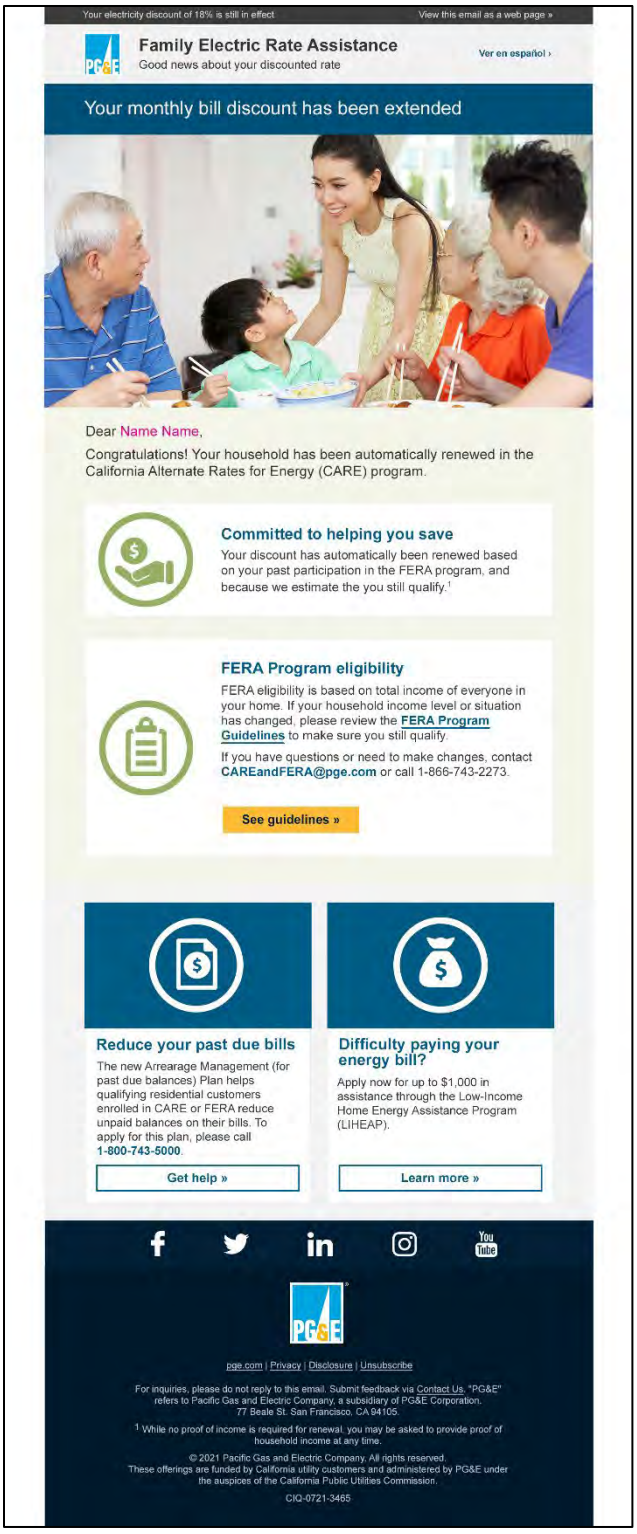
FERA Auto-Recertification Email Sample



Your electricity discount of 18% is still in effect View this email as a web page »

Family Electric Rate Assistance
Good news about your discounted rate

Ver en español ›

Your monthly bill discount has been extended

Dear Name Name,

Congratulations! Your household has been automatically renewed in the California Alternate Rates for Energy (CARE) program.

Committed to helping you save

Your discount has automatically been renewed based on your past participation in the FERA program, and because we estimate the you still qualify.[1]

FERA Program eligibility

FERA eligibility is based on total income of everyone in your home. If your household income level or situation has changed, please review the **FERA Program Guidelines** to make sure you still qualify.

If you have questions or need to make changes, contact **CAREandFERA@pge.com** or call 1-866-743-2273.

See guidelines »

Reduce your past due bills

The new Arrearage Management (for past due balances) Plan helps qualifying residential customers enrolled in CARE or FERA reduce unpaid balances on their bills. To apply for this plan, please call **1-800-743-5000**.

Get help »

Difficulty paying your energy bill?

Apply now for up to $1,000 in assistance through the Low-Income Home Energy Assistance Program (LIHEAP).

Learn more »

pge.com | Privacy | Disclosure | Unsubscribe

For inquiries, please do not reply to this email. Submit feedback via Contact Us. "PG&E" refers to Pacific Gas and Electric Company, a subsidiary of PG&E Corporation. 77 Beale St. San Francisco, CA 94105.

[1] While no proof of income is required for renewal, you may be asked to provide proof of household income at any time.

These offerings are funded by California utility customers and administered by PG&E under the auspices of the California Public Utilities Commission.

CIQ-0721-3465

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Appendix F: FERA Marketing Materials
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CARE/FERA Bill Insert Sample

CARE Program
California Alternate Rates for Energy
pge.com/care - 1-866-743-2273
Offers a monthly discount on energy bills for qualifying households.

FERA Program
Family Electric Rate Assistance
pge.com/fera - 1-866-743-5000
Offers a monthly discount on electric bills for households of three or more people with a slightly higher income than required for CARE.
Email: CAREandFERA@pge.com

Programa CARE
California Alternate Rates for Energy
pge.com/care-es - 1-866-743-2273
Ofrece un descuento mensual en las facturas de energía a los hogares que reúnan los requisitos de ingresos.

Programa FERA
Family Electric Rate Assistance
pge.com/fera-es - 1-866-660-6789
Ofrece un descuento mensual en las facturas de electricidad a familias de tres o más personas que reciban un ingreso ligeramente más alto que el requerido para CARE.
Email: CAREandFERA@pge.com

Are you on the best rate plan for how you use energy? Get your personalized rate comparison analysis at [redacted]

¿Es su plan actual de tarifas el más adecuado para su consumo de energía? Obtenga su análisis comparativo y personalizado de tarifas visitando el sitio [redacted]

Program Income Guidelines (good until May 31, 2023) • Requisitos de ingreso del programa (válidos hasta el 31 de mayo, 2023)

		Number of People in Household • Número de personas en el hogar							
		1-2	3	4	5	6	7	8	Por cada persona adicional, sume
Total Gross Annual Household Income / Ingreso bruto anual total del hogar	CARE	$36,420 or less / o menos	$44,360 or less / o menos	$55,300 or less / o menos	$64,940 or less / o menos	$74,580 or less / o menos	$83,820 or less / o menos	$93,260 or less / o menos	$9,440
	FERA	Not Eligible / No elegible	$44,361 - $57,570	$55,301 - $69,375	$64,941 - $81,179	$74,581 - $93,978	$83,821 - $106,775	$93,261 - $118,575	$9,440 - $11,800

*If your household's income is the current amount or more per month or $ more than your income from your latest bill, it includes income from all people and reportable sources. Calculate household income and the change you typed on current earnings or expense to see if your household qualifies now or forward.

El ingreso bruto total del hogar es el mismo o más de dólares que incluye los ingresos de todas las personas de su hogar, por un lado antes de impuestos. Incluye ingresos de todas las personas y fuentes declarables. Calcule los ingresos totales del hogar y luego determine si cumple los requisitos para el programa actualmente o en el futuro según el cambio que escribió en los ingresos actuales de este mes o aproximados en su hogar.

NO POSTAGE NECESSARY IF MAILED IN THE UNITED STATES

BUSINESS REPLY MAIL
FIRST-CLASS MAIL PERMIT NO. 27100 SAN FRANCISCO, CA

POSTAGE WILL BE PAID BY ADDRESSEE

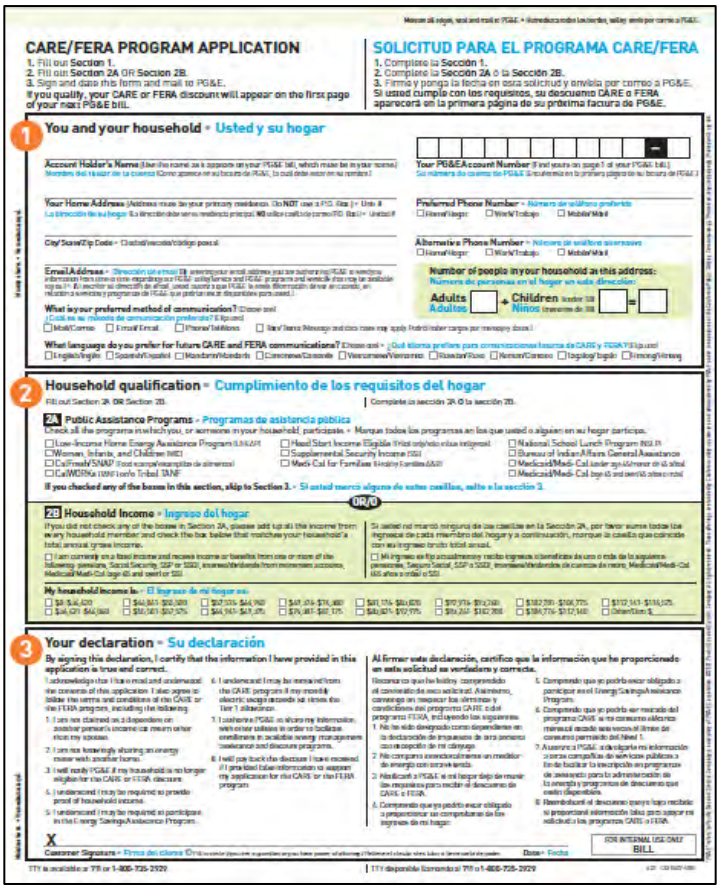
PACIFIC GAS AND ELECTRIC COMPANY
CARE/FERA PROGRAM
PO BOX 7905
SAN FRANCISCO CA 94120-9465

Customers can help lower their energy bills by at least 18% with CARE and FERA programs

NEW income guidelines effective June 1. See if you qualify.

Los clientes pueden ayudar a reducir sus facturas de energía en al menos un 18% con los programas CARE y FERA

NUEVAS pautas de ingreso efectivas al 1 de junio.



CARE/FERA PROGRAM APPLICATION

1. Fill out Section 1.
2. Fill out Section 2A OR Section 2B.
3. Sign and date this form and mail to PG&E.

If you qualify, your CARE or FERA discount will appear on the first page of your next PG&E bill.

SOLICITUD PARA EL PROGRAMA CARE/FERA

1. Complete la Sección 1.
2. Complete la Sección 2A ó la Sección 2B.
3. Firme y ponga la fecha en esta solicitud y envíela por correo a PG&E.

Si usted cumple con los requisitos, su descuento CARE o FERA aparecerá en la primera página de su próxima factura de PG&E.

1 You and your household • Usted y su hogar

Account Holder's Name (Use the name as it appears on your PG&E bill, which must be in your name.) • Nombre del titular de la cuenta (Como aparece en su factura de PG&E, la cual debe estar en su nombre.)

Your PG&E Account Number (Find yours on page 1 of your PG&E bill.) • Su número de cuenta de PG&E (Encuéntrelo en la primera página de su factura de PG&E.)

Your Home Address (Address must be your primary residence. Do NOT use a P.O. Box.) • Su dirección de su hogar (La dirección debe ser su residencia principal. NO utilice casilla de correo P.O. Box.)

Preferred Phone Number • Número de teléfono preferido
☐ Home/Hogar ☐ Work/Trabajo ☐ Mobile/Móvil

City/State/Zip Code • Ciudad/estado/código postal

Alternative Phone Number • Número de teléfono alternativo
☐ Home/Hogar ☐ Work/Trabajo ☐ Mobile/Móvil

Email Address • Dirección de email (By entering your email address you are authorizing PG&E to send you information from time to time regarding your PG&E utility service and PG&E programs and events for which you may be eligible. You may opt out directly by email, unless you're a non-PG&E customer, in relation to services and programs for PG&E that you have or are applying for.)

Number of people in your household at this address: • Número de personas en el hogar en esta dirección:
Adults / Adultos ☐ + Children (under 18) / Niños (menores de 18) ☐ =

What is your preferred method of communication? (Choose one) • ¿Cuál es su método de comunicación preferido? (Elija uno)
☐ Mail/Correo ☐ Email/Email ☐ Phone/Teléfono ☐ Text/Texto (Message and data rates may apply. Text to halt or unsubscribe.) / Mensaje y datos pueden aplicar cargos por mensajes y datos.)

What language do you prefer for future CARE and FERA communications? (Choose one) • ¿Qué idioma prefiere para comunicaciones futuras de CARE y FERA? (Elija uno)
☐ English/Inglés ☐ Spanish/Español ☐ Mandarin/Mandarín ☐ Cantonese/Cantonés ☐ Vietnamese/Vietnamita ☐ Russian/Ruso ☐ Korean/Coreano ☐ Tagalog/Tagalo ☐ Hmong/Hmong

2 Household qualification • Cumplimiento de los requisitos del hogar

Fill out Section 2A OR Section 2B. | Complete la sección 2A O la sección 2B.

2A Public Assistance Programs • Programas de asistencia pública

Check all the programs in which you, or someone in your household, participate. • Marque todos los programas en los que usted o alguien en su hogar participa.

☐ Low-Income Home Energy Assistance Program (LIHEAP)
☐ Women, Infants, and Children (WIC)
☐ CalFresh/SNAP (Food stamps/estampillas de alimentos)
☐ CalWORKs (TANF) or/o Tribal TANF
☐ Head Start Income Eligible (Only for/Solo para Ingresos)
☐ Supplemental Security Income (SSI)
☐ Medi-Cal for Families (Medicaid/Medi-Cal para Familias)
☐ National School Lunch Program (NSLP)
☐ Bureau of Indian Affairs General Assistance
☐ Medicaid/Medi-Cal (under age 65/menor de 65 años)
☐ Medicaid/Medi-Cal (age 65 and over/65 años o más)

If you checked any of the boxes in this section, skip to Section 3. • Si usted marcó alguno de estos casillas, salte a la sección 3.

OR/O

2B Household Income • Ingreso del hogar

If you did not check any of the boxes in Section 2A, please add up all the income from every household member and check the box below that matches your household's total annual gross income.

Si usted no marcó ninguna de las casillas en la Sección 2A, por favor sume todos los ingresos de cada miembro del hogar y a continuación, marque la casilla que coincida con su ingreso bruto total anual.

☐ I am currently on a fixed income and receive income or benefits from one or more of the following: pensions, Social Security, SSP or SSD, interest/dividends from retirement accounts, Medicaid/Medi-Cal (age 65 and over) or SSI.

☐ Mi ingreso es fijo actualmente y recibo ingresos o beneficios de uno o más de los siguientes: pensiones, Seguro Social, SSP o SSD, intereses/dividendos de cuentas de retiro, Medicaid/Medi-Cal (65 años o más) o SSI.

My household income is... • El ingreso de mi hogar es:

☐ $0 - $36,420 ☐ $36,421 - $44,360 ☐ $44,361 - $55,300 ☐ $55,301 - $64,940 ☐ $64,941 - $74,580 ☐ $74,581 - $83,820 ☐ $83,821 - $93,260 ☐ $93,261 - $118,575 ☐ $118,576 - $142,200 ☐ $142,201 - $170,640 ☐ $170,641 - $204,768 ☐ $204,769 - $245,720 ☐ $245,721 - $294,864 ☐ Other/Otro $_____

3 Your declaration • Su declaración

By signing this declaration, I certify that the information I have provided in this application is true and correct.

I acknowledge that I have read and understand the contents of this application. I also agree to follow the terms and conditions of the CARE or the FERA program, including the following:

1. I am not claimed as a dependent on another person's income tax return other than my spouse.
2. I am not knowingly sharing an energy meter with another home.
3. I will notify PG&E if my household is no longer eligible for the CARE or FERA discount.
4. I understand I may be required to provide proof of household income.
5. I understand I may be required to participate in the Energy Savings Assistance Program.
6. I understand I may be removed from the CARE program if my monthly electric usage exceeds six times the Tier 1 allowance.
7. I authorize PG&E to share my information with other utilities in order to facilitate enrollment in available energy management assistance and discount programs.
8. I will pay back the discount I have received if I provide false information or misrepresent my application for the CARE or the FERA program.

Al firmar esta declaración, certifico que la información que he proporcionado en esta solicitud es verdadera y correcta.

Reconozco que he leído y comprendido el contenido de esta solicitud. Asimismo, convengo en respetar los términos y condiciones del programa CARE o del programa FERA, incluyendo los siguientes:

1. No he sido designado como dependiente en la declaración de impuestos de otra persona que no sea mi cónyuge.
2. No comparto conscientemente un medidor de energía con otra vivienda.
3. Avisaré a PG&E si mi hogar deja de reunir los requisitos para recibir el descuento de CARE o FERA.
4. Comprendo que es posible que me soliciten una comprobación de los ingresos de mi hogar.
5. Comprendo que es posible que se me solicite participar en el Energy Savings Assistance Program.
6. Comprendo que es posible que me retiren del programa CARE si mi consumo eléctrico mensual supera seis veces el límite de consumo permitido del Nivel 1.
7. Autorizo a PG&E a divulgar mi información a otras compañías de servicios públicos a fin de facilitar la inscripción en programas de asistencia para la administración de la energía y programas de descuentos que estén disponibles.
8. Reembolsaré el descuento que haya recibido si proporciono información falsa para lograr mi solicitud a los programas CARE o FERA.

X
Customer Signature • Firma del cliente (Typing your name is equivalent to your legal signature. / Escribir su nombre equivale a su firma legal.) Date • Fecha

FOR INTERNAL USE ONLY
BILL

TTY is available at 711 or 1-800-735-2929 | TTY disponible llamando al 711 o 1-800-735-2929