



# Joint IOUs Program Highlights

**Low Income Oversight Board Meeting  
December 15, 2023**

Webex Meeting Format

# Low Income and Clean Energy Workshop Update

On November 9, 2023, the IOUs, held the third annual Low Income and Clean Energy Workshop, providing interested stakeholders with an opportunity to provide program information and continue discussion on collaboration and leveraging opportunities.

The overall objectives of the workshop were to:

- ✓ Create connections and foster opportunities for relationship development and networking across California's income-qualified and clean energy program administrator community.
  - ✓ Provide program administrators with information on initiatives and programs along with approaches for customer engagement and increasing participation, and program collaboration.
  - ✓ Discuss barriers, lessons learned and shared successes to building program partnerships and customer involvement.
  - ✓ Highlight successful program coordination that could be modeled and/or expanded.
- Ten panelist participated in the 3-hour event, hosting 90 participants
  - Next steps: The IOUs will be posting a workshop report on the PDA on the week of 12/18



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

## CARE

Enrollment: 1,406,768  
Enrollment Rate: 100%  
Discounts: \$837,974,845  
% Adm. Expenditure: 58%

## FERA

Enrollment: 38,512  
Enrollment Rate: 24%  
Discounts: \$14,659,701  
% Adm. Expenditure: 85%

## ESA Main

Homes treated: 58,551  
• 97% YTD  
Energy Savings:  
• 25,130,663 kWh  
• 70% YTD  
• 1,140,470 therms  
• 79% YTD  
% Expenditure: 83% YTD

## Additional Q4 Highlights

- **Northern Multifamily Whole Building Program (N. MFWB):** Program fully launched in July 2023 and has treated 1,620 in-unit properties, enrolled 44 whole building projects, and is conducting eligibility on 162 whole building leads as of October 2023. The SPOC program has referred 278 projects to 44 other programs through October, and 44 referrals were converted to applications. PG&E plans to carry-over an estimated \$28.6M in unspent current PY funds to PY 2024.
- **Pilot Plus/Pilot Deep:** PP/PD will continue a gradual ramp-up of project installations through end of year 2023. The Pilot grew capacity from 1 project initiated in 2022, to 115 initiated through November 2023, and is currently on pace to begin 2024 installing roughly 20 projects per month. PG&E plans to carry-over an estimated \$12.4M in unspent current PY funds to PY 2024.
- **ESA Tribal Outreach Grant Program:** In July 2023, PG&E kicked off its annual grant cycle by launching three new two-year grants. To provide additional support, PG&E conducted in-person outreach meetings with two of the three grant recipients.
- **FERA:** Contract executed for 3<sup>rd</sup> party FERA Enrollment Barriers study to run Q4 2023 – Q1 2025 in PG&E's service territory.
- **AMP/Disconnections:** Since AMP program launch in February 2021, 380k customers have enrolled with a total of \$213M in arrears forgiven. 52k customers completed their AMP enrollment, resulting in the elimination of their arrearages (includes customers that received CAPP funding). Implementation of additional customer financial assistance touchpoints to help provide support to customers with outstanding arrearages.

# SCE 2023 Program Summary – Through October 2023



## CARE

- Customers Enrolled: 1,268,624
- Enrollment Rate: 96%
- Newly Enrolled Customers: 300,908

## FERA

- Customers Enrolled: 29,957
- Enrollment Rate: 13%
- Newly Enrolled Customers: 9,295

## ESA

- Homes Treated: 7,654
- Energy Savings: 4,594,004 kWh

## MFWB

- Properties Treated:
- Energy Savings:

The Southern MFWB launched on July 1, 2023. By the end of October, the implementer reported 18 Whole Building enrollments and 5 property assessments. They are engaging with a pipeline of 1,225 property level leads and 3,711 residential inquiries. SCE has continued collaborating with the implementer on program related tasks and lead referrals.

## Additional Highlights

### ***Tribal***

- SCE stays in regular contact with tribal leaders to identify opportunities for tribal communities. Recently, SCE completed sessions with five tribes participating in a mini-grant program, addressed 2023 activities, and potential opportunities for 2024. Additionally, in October, SCE recognized the contributions of customers, community partners, and tribal leaders at a multicultural event held at SCE's Energy Education Center in Tulare.

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

- In October 2022, SCE's Residential credit collection efforts resumed
- As of October 2023, AMP had 157,475 customers enrolled in the program, with a total of \$71M forgiven since program launch.

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

## CARE

- Customers Enrolled: 346,865
- Newly Enrolled: 60,603
- Enrollment Rate: 115%

## FERA

- Customers Enrolled: 11,052
- Newly Enrolled: 2,502
- Enrollment Rate: 26%

## ESA

- Homes Treated: 3,437
  - 41% YTD
- kWh Saved: 541,022
  - 27% YTD
- Therms Saved: 2,460
  - 3% YTD

## MF CAM

- # of Properties: 17
  - 121% YTD
- kWh Saved: 203,993
  - 102% YTD
- Therms Saved: 21,071
  - 585% YTD

## Additional Highlights

**The Southern Multifamily Whole Building (MFWB):** As of October, the Program has enrolled 18 whole building projects, completed 5 property assessments and the Program maintained an active pipeline of 1,225 property leads and 3,711 residential inquiries within the Southern MFWB Program's service territory.

**Tribal Grants/Outreach:** SDG&E has offered mini grants to 7 tribes. Two have successfully completed financial documents and have received the grants. Three additional tribes have expressed interest and are gathering the necessary paperwork. In September and October, SDG&E hosted Community Resource fairs where we provided one-on-one customer support, and direct program enrollment. In addition, SDG&E participated in community events such as Wellness and Tribal Safety Fairs.

**Arrearage Forgiveness/Disconnections** - As of October 31, there are 12,489 AMP customers with total arrearages at \$20.8M

There are 6,988 customers who have successfully completed with a total of \$23M forgiven.

SDG&E, Neighbor-to-Neighbor program has assisted 8,158 customers with pledge dollar totals of \$4.4M to assist customers with arrearages

# SoCalGas Program Summary – As of October 31, 2023



## CARE

- Customers Enrolled: 1,863,033
- Enrollment Rate: 111%
- Newly Enrolled Customers: 292,208

## ESA Main Program

- Homes Treated: 40,476  
58% YTD
- Therms Saved: 788,995  
55% YTD
- % Expenditure: 56% YTD

## MF CAM

- Central Boiler Projects: 18
- Impact: 219 bldgs, 2,953 units,  
5,800+ tenants
- Therms Saved: 74,631

## Additional Highlights

### Tribal

- Through Oct. 31, SoCalGas has met with 21 Tribes (18 Federally Recognized and 3 Non-Federally Recognized) and established a point of contact for the Low-Income programs
- Continue to enhance outreach strategy to help navigate and increase engagement within tribal communities

### Disconnections/AMP

- 238,070 customers enrolled in AMP (as of 10/31/23). Residential credit collections efforts resumed in Q3 2023.

### ESA Main Program

- SoCalGas has maintained constant communication and feedback loop with Contractors and based on these conversations, SoCalGas:
  - Increased HE Wall Furnaces Fee by 31%
  - Added Tankless Water Heater to measure offerings
  - Added Smart Fan Controller to measure offerings and increased the fee paid to our Contractors to support a recent increase by the manufacturer
  - Added temporary Fuel Surcharge to support current high gasoline prices
  - Addressed Program Representative onboarding process, retention, and enrollment closing timing issues
  - Provided Customer Leads list upon Contractor request
- Last year's contract negotiations required Contractors to complete a cost and fees worksheet which was used to ensure adequate compensation.
  - implemented Performance Based Incentives (PBI) for PY2023 to reward high performers with additional compensation on a quarterly basis
    - With the success of PBI this year and per recent conversations with Contractors, PBI will continue and be awarded in PY2024
  - Throughout the year, and ongoing, reallocated budgets from Contractors who are unable to spend their budget to those who are



*Pacific Gas and  
Electric Company™*



# **Joint IOUs Energy Savings Assistance Program Contractor Funding & Solicitations**

# ESA Programs Joint IOUs Solicitations Schedule

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

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

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

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

## PG&E: Solicitations for PG&E Energy Savings Assistance Programs

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

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

**Last revised December 1, 2023**

[illegible]



# ESA Update On Contractor Funding

January – October 2023

Utility	Funding Issue	Impact
PG&E	No issues to report. PG&E spent 83% of the ESA Main authorized budget through October 2023 and is projected to spend 100% of measure-level budget.	None
SCE	SCE spent 34% of the ESA Main authorized budget through October 2023, and forecast to increase spend to 50% for PY 2023.	SCE plans to commit all possible unspent funds from PY 2023 to PY 2024.
SDG&E	No contractor funding issues.	None
SoCalGas	<ol style="list-style-type: none"> <li>1. The program's washer installer (ARCA) liquidated their company after months of ownership issues and will be unable to fulfill their PY2023 contract.</li> <li>2. Three (3) of the program's prime Contractors with low production returned a portion of their allocated funding/contract amount after quarterly KPIs and goals were not met.</li> </ol>	<ol style="list-style-type: none"> <li>1. SoCalGas amended a current Contractor's contract to include washer installation work with additional funding.</li> <li>2. High production prime Contractors were reallocated returned funding from low production Contractors. <ul style="list-style-type: none"> <li>• Additional funding was allocated with increased therm saving goals.</li> </ul> </li> </ol>





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

# CARE Program Budgets and Enrollment

PU Code Section 739.1(a) requires the CPUC to establish a program of assistance to low-income electric and gas customers with annual household incomes that are no greater than 200 percent of the federal poverty guideline levels.

## January – October 2023 CARE Program Updates\*

Authorized 2023 Program Budgets and Expenditures				
Utility	2023 Budget	Expenditures	%	Rate Discounts
PG&E	\$13,961,600	\$8,036,715	58%	\$837,974,845
SCE	\$9,128,227	\$5,234,927	57%	\$608,820,101
SDG&E	\$6,922,453	\$4,975,957	72%	\$217,833,546
SoCalGas	\$10,181,364	\$7,410,055	73%	\$229,240,759
<b>Total</b>	<b>\$40,193,644</b>	<b>\$25,657,654</b>		<b>\$1,893,869,251</b>

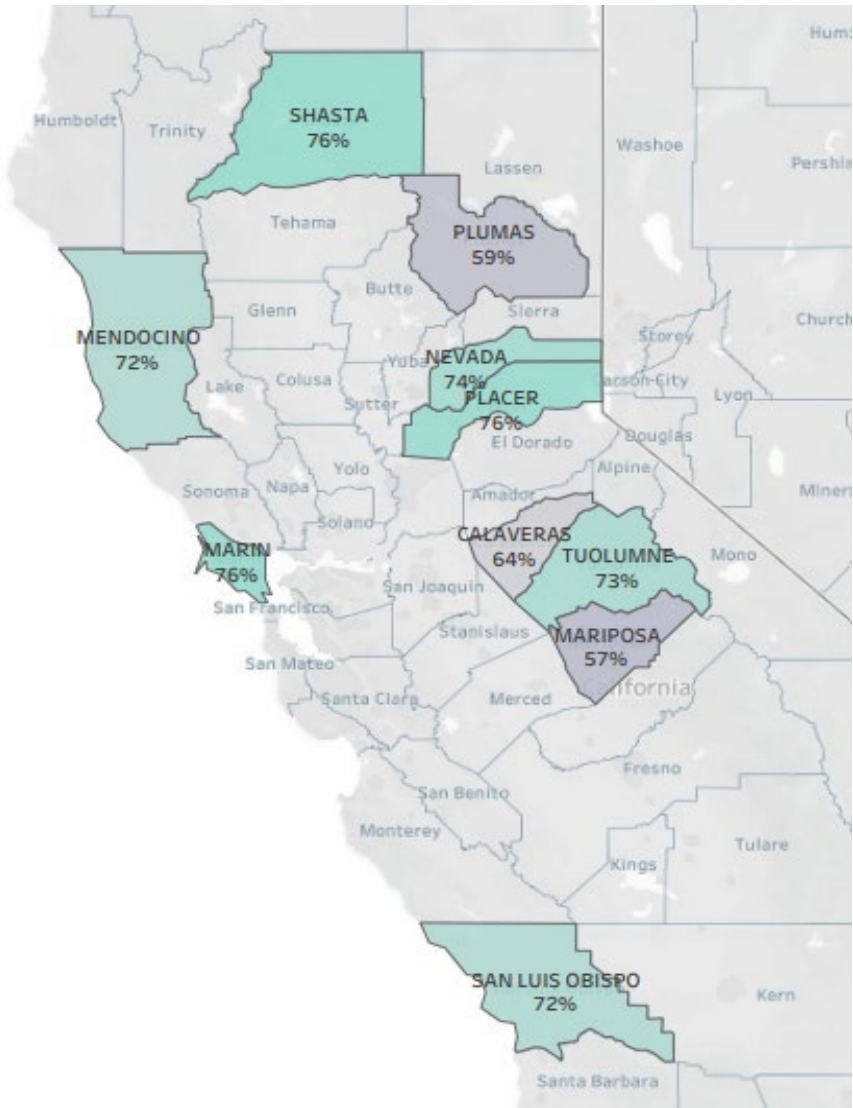
2023 Enrollment						
Utility	Total Residential Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled**	Enrollment Rate	Newly Enrolled Customers
PG&E	5,480,468	1,402,162	26%	1,406,768	100%	228,741
SCE	4,587,494	1,315,495	29%	1,268,624	96%	300,908
SDG&E	1,400,489	301,966	21%	346,865	115%	60,603
SoCalGas	5,753,654	1,674,060	29%	1,863,033	111%	292,208
<b>Total</b>	<b>17,222,105</b>	<b>4,693,683</b>		<b>4,885,290</b>		<b>882,460</b>

\* Authorized budgets pursuant to Decision (D.)21-06-015. January – October 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed on November 21, 2023.

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



# CARE Program PG&E Enrollment Map



PG&E Counties With Lowest Enrollment Rates	
County	Enrollment Rate*
MARIPOSA	57%
PLUMAS	59%
CALAVERAS	64%
MENDOCINO	72%
SAN LUIS OBISPO	72%
TUOLUMNE	73%
NEVADA	74%
PLACER	76%
MARIN	76%
SHASTA	76%

\*Represents PG&E counties with the lowest enrollment rates, as of October 31, 2023.

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

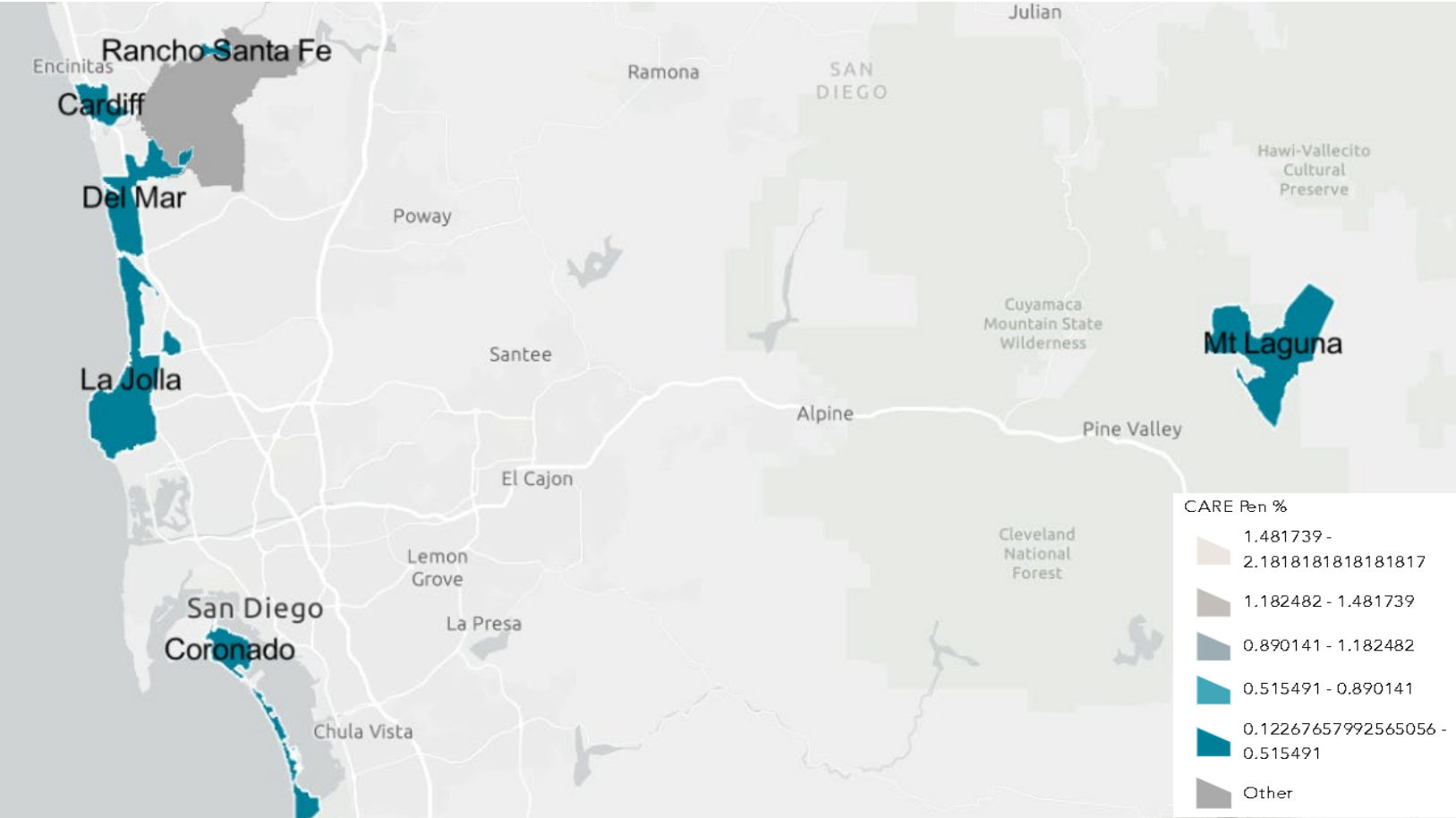
# CARE Program *SCE Enrollment map*



County	Enrollment Rate*
San Bernardino	110%
Kings	108%
Riverside	104%
Tulare	102%
Los Angeles	97%
Orange	84%
Ventura	83%
Kern	79%
Inyo	64%
Santa Barbara	56%
Mono	38%

\*Represents the enrollment rates for all SCE counties effective October 31, 2023, and excludes counties with less than 1,000 estimated eligible households

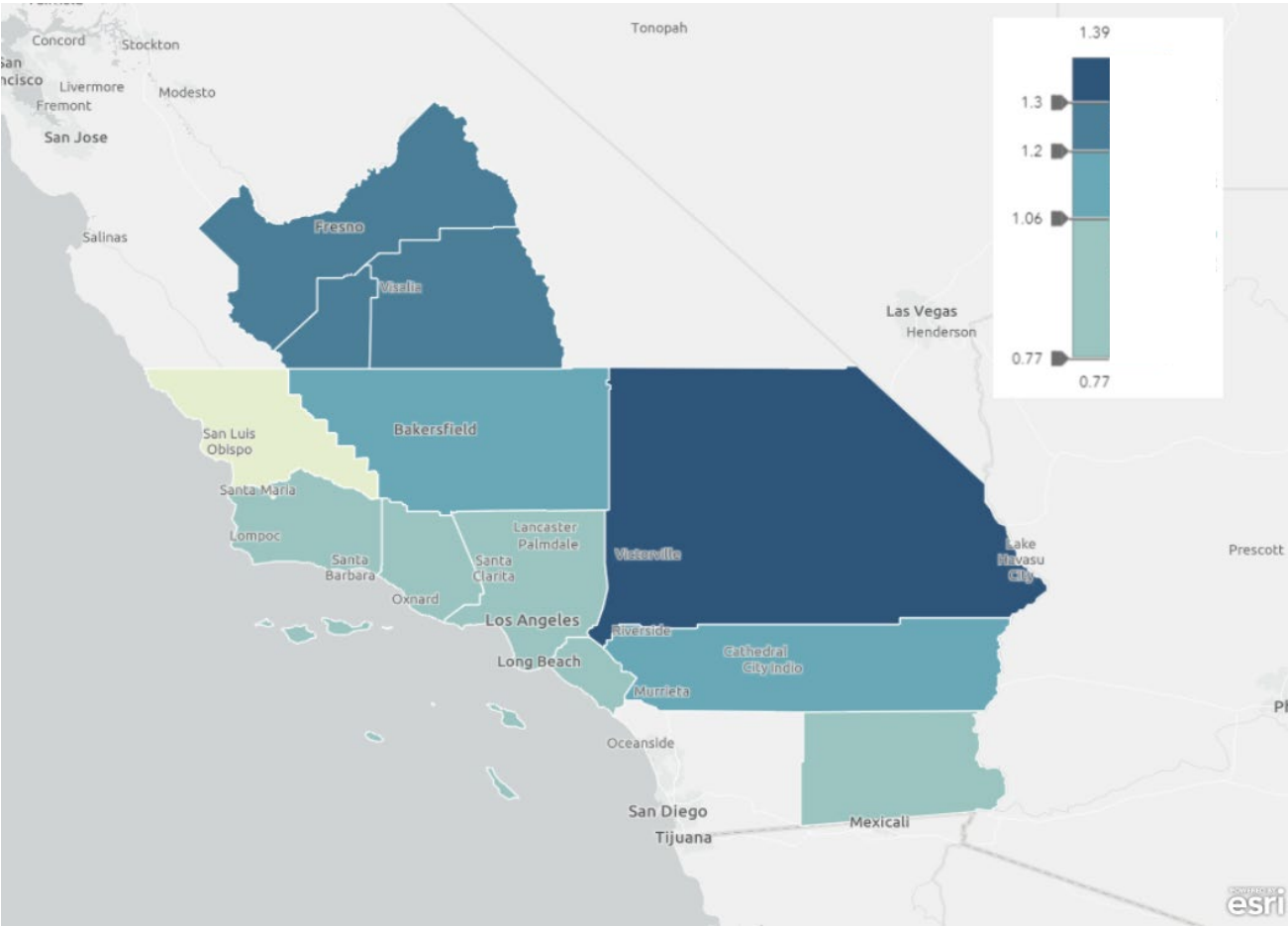
# CARE Program *SDG&E Enrollment Map*



Zip codes with lowest enrollment (overall)	
City	Enrollment Rate*
Rancho Santa Fe	17%
Mount Laguna	20%
Coronado	32%
La Jolla	38%
Del Mar	39%
Cardiff	50%

\*Represents SDG&E city zip codes with the lowest enrollment rates as of October 31, 2023.

# CARE Program *SoCalGas Enrollment map*



County	Enrollment Rate *
San Bernardino	139%
Kings	129%
Tulare	130%
Fresno	125%
Kern	120%
Riverside	119%
Los Angeles	106%
Ventura	105%
Santa Barbara	102%
Orange	103%
Imperial	95%
San Luis Obispo	77%

\*Represents the enrollment rates for all SoCalGas counties Jan-Oct 2023, as reported in the IOU ESA-CARE Monthly Report (Filed Nov. 21, 2023).

# FERA Program Budgets and Enrollment

## January – October 2023 FERA Program

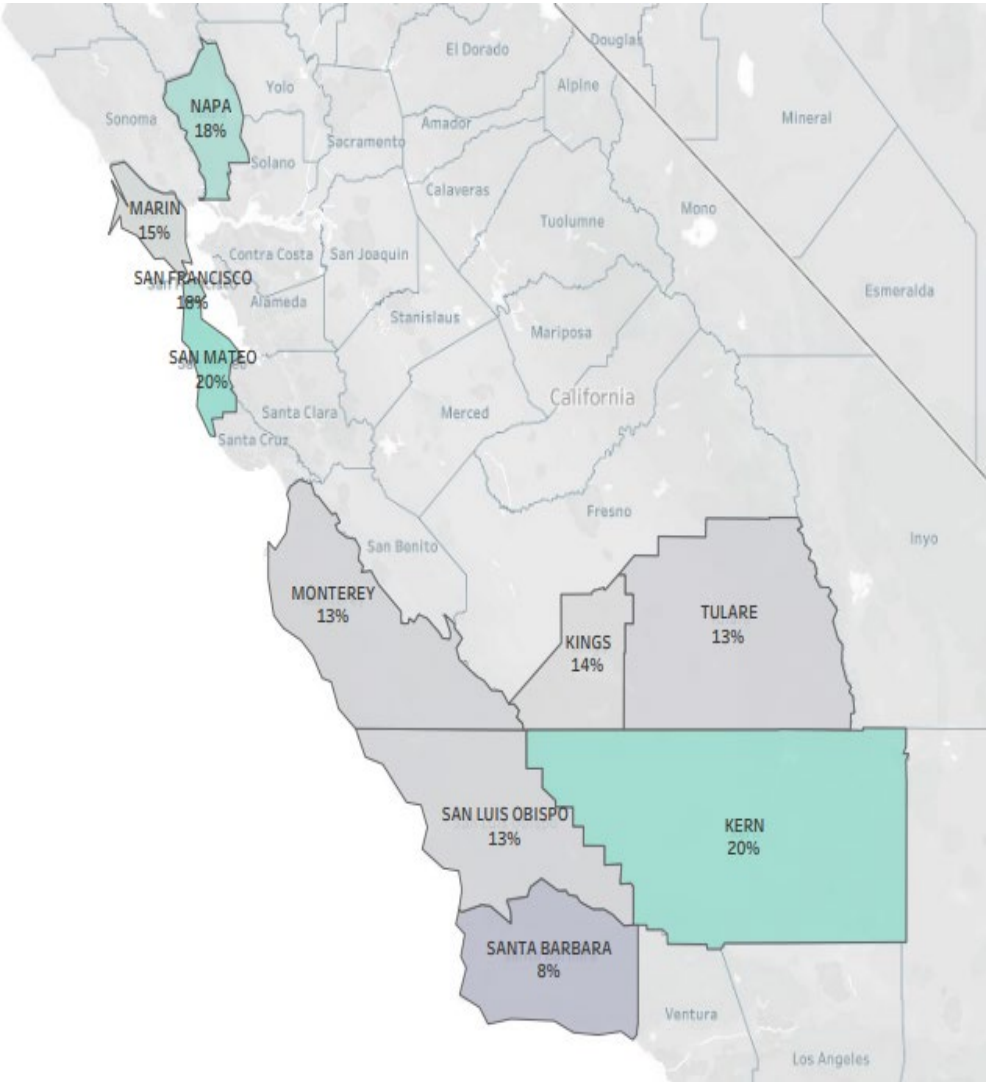
Authorized 2023 Program Budgets Expenditures				
Utility	2023 Budget	Expenditures	%	Rate Discounts
PG&E	\$2,846,400	\$2,420,024	85%	\$14,659,701
SCE	\$1,398,444	\$433,509	31%	\$10,266,017
SDG&E	\$612,393	\$267,094	44%	\$4,015,923
<b>Total</b>	<b>\$4,857,237</b>	<b>\$3,120,627</b>		<b>\$28,941,641</b>

2023 Enrollment						
Utility	Total Residential Electric Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled	Enrollment Rate	Newly Enrolled Customers
PG&E	4,631,472	163,489	4%	38,512	24%	12,752
SCE	4,587,494	223,982	5%	29,957	13%	9,295
SDG&E	1,400,489	42,980	3%	11,052	26%	2,502
<b>Total</b>	<b>10,619,455</b>	<b>430,451</b>		<b>79,521</b>		<b>24,549</b>

\*Authorized budgets pursuant to D.21-06-015. January – October 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed November 21, 2023.



# FERA Program *PG&E Enrollment Map*



PG&E Counties With Lowest Enrollment Rates	
County	Enrollment Rate*
SANTA BARBARA	8%
TULARE	13%
MONTEREY	13%
SAN LUIS OBISPO	13%
KINGS	14%
MARIN	15%
SAN FRANCISCO	18%
NAPA	18%
KERN	20%
SAN MATEO	20%

\*Represents PG&E counties with the lowest enrollment rates, as of October 31, 2023.

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

# FERA Program *SCE Enrollment map*



County	Enrollment Rate*
Riverside	17%
Orange	14%
Kern	14%
Ventura	14%
San Bernardino	13%
Los Angeles	12%
Tulare	12%
Kings	10%
Santa Barbara	8%

\*Represents the enrollment rates for all SCE counties effective October 31, 2023, and excludes counties with less than 1,000 estimated eligible households

# FERA Program *SDG&E Enrollment Map*



Zip codes with lowest enrollment (overall)	
City	Enrollment Rate*
San Clemente	13%
Fallbrook	17%
San Ysidro	20%
Oceanside	21%
Escondido	22%
San Diego (South Bay)	24%
San Marcos	24%
Vista	26%

\*Represents SDG&E city zip codes with the lowest enrollment rates as of October 31, 2023.

# Energy Savings Assistance Program Budget Update

PU Code Section 2790 requires the CPUC to provide energy efficiency services to qualifying low-income households. This program provides energy efficiency services such as weather stripping, insulation, and appliance upgrades to help these Californians better manage their energy bills.

## 2023 ESA Program Budget Updates January – October 2023\*

Utility	Authorized Budget <sup>1</sup>	YTD Expenditures <sup>2</sup>	%
PG&E	\$219,981,838	\$ 114,041,592	52%
SCE	\$69,127,408	\$ 20,138,890	29%
SDG&E	\$29,852,008	\$ 14,739,494	49%
SoCalGas	\$94,836,846	\$ 53,499,715	56%
<b>Total</b>	<b>\$413,798,100</b>	<b>\$ 202,419,691</b>	<b>49%</b>

\* January – October 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed November 21, 2023.

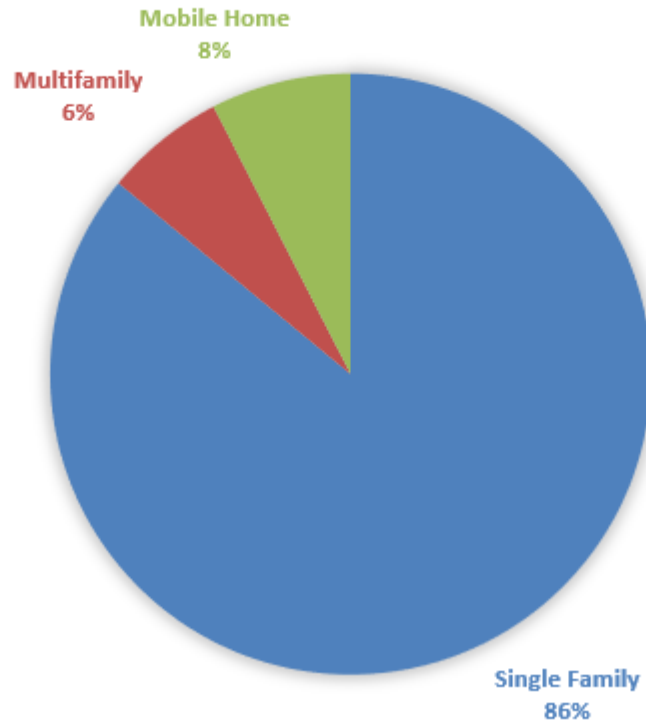
<sup>1</sup> Authorized budgets are the sum as shown in each IOU's ESA-CARE-FERA Monthly Report, ESA Table 1, Table 1A and/or Table 2B.

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



# Energy Savings Assistance Program – Program Participation Update

STATEWIDE PARTICIPATION  
(% TOTAL BY HOUSING TYPE)



2023 Households Treated  
January – October 2023

2023 Households Treated <sup>1</sup>				
Utility	Est. HH Treated Target	Total	Total as % of 2023 Treated	Total as % of Eligible ESA HH <sup>2</sup>
PG&E	60,437	58,551	97%	3.10%
SCE	37,871	7,654	20%	0.45%
SDG&E	11,711	3,437	29%	1.14%
SoCalGas	69,837	40,476	58%	1.73%
<b>Total</b>	<b>179,856</b>	<b>110,118</b>		

<sup>1</sup> January – October 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed November 21, 2023.

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



# Energy Savings Assistance Program Energy Savings Update

## 2023 Energy Savings Targets January – October 2023

2023 Annual Savings for YTD Treatment <sup>1</sup>			Estimated Annual HH Usage for HH Treated YTD <sup>2</sup>		Savings as % of Average HH Usage		Annual Program Savings Goal <sup>3</sup>	
Utility	ESA kWh	ESA Therms	kWh	therms	kWh	therms	kWh	therms
PG&E	25,130,663	1,140,470	354,116,448	19,813,658	7%	6%	35,773,079	1,458,655
SCE	4,594,004	N/A	48,684,099	N/A	9%	N/A	22,416,302	244,348
SDG&E	745,015	23,531	14,682,864	767,138	5%	3.1%	2,593,606	108,790
SoCalGas	N/A	788,995	N/A	12,798,511	N/A	6.2%	N/A	1,435,220
<b>TOTAL</b>	<b>30,469,682</b>	<b>1,952,996</b>	<b>417,483,411</b>	<b>33,379,308</b>			<b>60,782,987</b>	<b>3,247,013</b>

<sup>1</sup> January – October 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed November 21, 2023.

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

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





# Energy Savings Assistance Program Multifamily Update

## January – October 2023 MULTIFAMILY UPDATES

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

- **PG&E:** As of October 31, 2023, PG&E's SPOC has referred 278 multifamily customers to 44 programs including, but not limited to, SMUD, CSD LIWP, 3CE, BUILD, TECH, and BayREN; and 44 referrals have been converted to program applications. PG&E also launched a SPOC web tool to refer customers to the eligible program for their property using their zip code. To date, web tool has made 104 referrals to other programs.
- **SCE:** To date, SCE has received 11 referrals from SOMAH, these leads were forwarded to the Southern MFWB implementer for possible participation. SCE's SPOC forwarded SOMAH's referral form to 17 past MF CAM participants. SCE's SPOC will continue collaborating with SCG/SDGE SPOCs to align leveraging efforts and to identify additional opportunities for program layering.
- **SDG&E:** SDG&E's SPOC referred 301 MF properties to the new ESA MFWB program and continues to leverage programs including but not limited to SOMAH. In addition to monthly IOU SPOC meetings, monthly Southern IOU SPOC meetings have been organized to enhance cooperation and synchronize SPOC-related efforts between the Southern Utilities. SPOC continues to outreach to local community organizations to engage with hard-to-reach communities.
- **SoCalGas:** SoCalGas has completed 18 Multifamily Common Area Measure (MF CAM) projects in 2023. CAM has installed all measures committed in 2023 and all new projects will be transitioned to the Multifamily Whole Building (MFWB) program, also known as Multifamily Energy Savings (MFES) which began on July 1, 2023.

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

- **PG&E:** PG&E started MF in-unit treatment in June and officially launched the MFWB program in July 2023. As of October 31, 2023, PG&E has completed 1,620 MF in-unit projects, and reported savings of 249,869 kWh, 22 kW, and 19,397 therms. The program also enrolled 44 and audited one whole building projects. The program currently has 410 whole building projects in the pipeline and is conducting eligibility screenings on 162 properties.
- **SCE:** In August, SCE closed the MF CAM initiative, completing 38 projects with a reported savings of 756,677 kWh for 2023. The Southern MFWB launched July 1st and SCE continues to collaborate with the implementer on various program related tasks as well as lead referrals. To date, the implementer has enrolled 18 properties and performed 5 property assessments. The implementer continues to engage with a pipeline of 1,225 property level leads and 3,771 residential inquiries.
- **SDG&E:** The SDG&E ESA MF CAM initiative achieved and exceeded its treatment and savings goals for 2023. The program officially concluded on June 30, 2023, and starting July 1, 2023, multifamily customers were directed to the ESA Southern MFWB Program. As of October 2023, the Southern MFWB Program has enrolled 18 whole building projects, completed 5 property assessments and maintained an active pipeline of 1,225 property leads and 3,711 residential inquiries within the Southern MFWB Program's service territory.
- **SoCalGas:** As of October 31, 2023, SoCalGas has completed 18 central boiler projects. These projects have impacted 2,953 units, 219 buildings, and improved the health, safety, and comfort of over 5,800 tenants. These projects have annual therm savings of 74,631.

# Tribal Community Outreach Update – PG&E



## Compliance/Outreach Activities as of October 2023

PG&E continued its efforts in implementing the 2023 Tribal Outreach Grant program.

- First grantee meeting between Tribes and ESA implementers took place on July 20 to discuss expectations and align the timing of ESA implementation, tribal needs, and processes for the ESA program.
- The Tribes are anticipating the following timing for ESA contractors start making home visits and installing measures for tribal members:
  - Lone Band of Miwok Indians – November 2023
  - Trinidad Rancheria – December 2023
  - North Fork Rancheria – March 2024

In addition, PG&E’s general ESA tribal outreach efforts included:

- In July, PG&E attended a Mechoopda Indian Tribal Council meeting to provide information on assistance programs with an emphasis on the ESA program and provided materials to be distributed to tribal members at upcoming meetings.
- In August, information regarding possible employment/training opportunities was sent to the Washoe Tribe of California and Nevada upon their request.
- In September, PG&E received seven requests from tribes for meetings and presentations in response to PG&E’s tribal email and Q3 tribal newsletter.
- In October, PG&E met with Buena Vista Rancheria, Middletown Rancheria, Bear River of the Rohnerville Rancheria, the Washoe Native Tribal Temporary Assistance for Needy Families (TANF) program, the Yurok Tribe, Pit River Tribe, and the Paskenta Band of Nomlaki Indians.

Beyond the ESA program’s tribal outreach efforts, PG&E’s centralized tribal team, which coordinates all of PG&E’s tribal communications, continued their ongoing outreach efforts to tribes across the service territory.

## Successes/Challenges

- Challenges:

PG&E continues to face barriers in outreach with Non-Federally Recognized Tribes. We are working to better understand the varying needs of these tribal communities to increase participation.
- Successes:
  - The three 2023 Outreach Grant participants have started outreach efforts to their members.
  - YTD, 73 tribes have met and conferred with PG&E staff and have been provided information about PG&E Assistance Programs, energy use, resiliency, safety, and other community initiatives.



# PG&E Tribal Community Outreach Update



Outreach Activities	Number of Participating Tribes*
Tribes completed ESA Meet & Confer**	18
Tribes requested outreach materials or applications	7
Federally Recognized Tribes who have not accepted offer to Meet and Confer	0
Non-Federally Recognized Tribes who participated in Meet & Confer	0
Tribes and Housing Authority sites involved in Focused Project/ESA	5
Partnership offer on Tribal Lands	102
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	38
Housing Authority and TANF offices who participated in Meet and Confer	6

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

\*\* This represents tribes participating in the ESA program's specific outreach; and does not include tribes who participate in PG&E's centralized tribal outreach efforts

# PG&E Tribal Community Outreach Update



**Energy Savings Assistance Program Table 7 - Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions \***  
**Pacific Gas and Electric Company**  
**Through October 31, 2023**

ESA Main (SF, MH, MF in-unit)

Customer Segments	# of Households Eligible [1]	# of Households Treated [2]	Enrollment Rate = (C/B)	# of Households Contacted [3]	Rate of Uptake = (C/E) [19]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures) [4][22]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only) [5][22]	Avg. Peak Demand Savings (kW) Per Treated Household [22]	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures) [4][22]	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only) [5][22]	Avg. Cost Per Treated Households [22]
Location											
Tribal [20]	1,911	195	10%	226	86%	466.67	466.67	0	18.70	19.32	\$ 1,351

# SCE Tribal Community Outreach Update

## Outreach Activities

- Ongoing Outreach:
  - SCE's tribal liaisons convene with each of the 13 tribes at least twice a year to engage in discussions about the various SCE programs and services that are available.
  - Maintained at least two tribal contacts per tribe
- Q4 Outreach:
  - SCE maintains ongoing communication with tribal leaders to explore opportunities for their communities. We recently concluded the final wrap-up sessions with the five tribes involved in the mini-grant program, where we delved into discussions about 2023 activities and potential opportunities for 2024.
  - In October, SCE hosted a multicultural event at the Energy Education Center in Tulare, where we acknowledged the contributions of customers and community partners, including tribal leaders.

## Successes and Challenges

- Successes:
  - SCE secured one-on-one meetings with eight (8) Tribes.
  - The following five (5) Tribes have signed mini-grant agreements: Benton Paiute, Bridgeport Indian Colony, Timbisha Shoshone, Tule River Indian Tribe, and Soboba Band of Luiseño Indians.
  - Receptive to accepting and distributing program information
- Challenges:
  - Identifying non-federally recognized tribes & receiving updates from tribes

# SCE Tribal Community Landscape

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

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

# SCE Tribal Segment Reporting

Energy Savings Assistance Program Table - 7 Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions											
Southern California Edison											
Through October 2023											
ESA Main (SF, MH, MF in-unit)											
Customer Segments	# of Households Eligible <sup>[1]</sup>	# of Households Treated <sup>[2]</sup>	Enrollment Rate = (C/B)	# of Households Contacted <sup>[3]</sup>	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households
Tribal	8,832	75	0.85%	21	357%	356	358	0.05	(5.35)	(5.35)	\$ 636

# SDG&E Tribal Community Outreach Update

OUTREACH ACTIVITIES (in accordance with D.21-06-015)	SUCSESSES & CHALLENGES
<ul style="list-style-type: none"> <li>Tribal Relations Manager has contacted all Tribes SDG&amp;E serves to conduct listening sessions.               <ul style="list-style-type: none"> <li>In 2023, has met with all 17 tribal nations.</li> </ul> </li> <li>Seven tribes were awarded mini-grants. Two tribes have completed their financial documents and received payment. Three additional tribes have expressed interest in grants and are working on gathering financial documents.</li> <li>Hosted Community Resource Fair in October 2023 and promoted low income programs, discussed topics such as Bill Assistance, Medical Baseline, Wildfire Safety, PSPS, AFN, provided direct enrollment support, and provided 1x1 customer assistance.</li> <li>Continued partnerships with two Tribal CBOs:               <ul style="list-style-type: none"> <li><b>Southern California Tribal Chairmen's Association (SCTCA)</b> <ul style="list-style-type: none"> <li>Total Outreach Activities YTD: 15</li> <li>Total Reach: 16,800</li> </ul> </li> <li><b>Southern California American Indian Resource Center (SCAIR)</b> <ul style="list-style-type: none"> <li>Total Outreach Activities YTD: 56</li> <li>Total Reach: 38,500</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li><b>Success:</b> SDG&amp;E continues to be proactive in promoting low-income programs by increasing its reach beyond Tribal elected leaders and working with staff as well as organizations on reservations such health and emergency services.</li> <li><b>Success:</b> Through ongoing CBO partnerships, SDG&amp;E staff has been invited to participate in SCAIR and SCTCA outreach events to promote CARE, FERA, and ESA.</li> <li><b>Success:</b> Partnership with Southern Indian Health Council and Indian Health Council has increased SDG&amp;E presence at smaller family events such as SDG&amp;E's participation in the Healthy Families series hosted by various remote tribal nations.</li> <li><b>Challenge:</b> Engaging non-federally recognized tribes.</li> <li><b>Challenge:</b> Tribes are overwhelmed with requests and have limited resources, so they don't always respond.</li> <li><b>Challenge:</b> Mini-grants require Tribes to complete tax paperwork before payment can be issued. SDG&amp;E has established streamlined process.</li> </ul>

# SDG&E Tribal Community Landscape

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

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

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

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

# SDG&E Tribal Segment Reporting\*

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

San Diego Gas & Electric  
October 2023

ESA Main (SF, MH, MF in-unit)											
Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Energy Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households
Demographic											
Tribal [2]	21,716	22	0%	1,600	1%	117	133	0	1	1	784

\*On October 2, 2023, SDG&E discovered a discrepancy with the Tribal flag used in its CIS system. SDG&E is investigating the issue to understand which tables/reports are impacted and will report the corrected data in a future report.



# SoCalGas Tribal Community Outreach Update

Outreach Activities	Successes & Challenges
<p><b>Activities are in accordance with D.21-06-015</b></p> <ul style="list-style-type: none"> <li>• SoCalGas continues communication with Tribes within SoCalGas' service territory             <ul style="list-style-type: none"> <li>• SoCalGas reaches out to federally-recognized and non-federally recognized Tribes in its service territory via in person meetings, emails, phone calls and at community events.</li> <li>• SoCalGas is continuing to build relationships with Tribes and establishing and/or maintaining a Tribal contact for each Tribe in its service territory.</li> </ul> </li> <li>• SoCalGas is enhancing its outreach strategy to help navigate and increase engagement within Tribal communities             <ul style="list-style-type: none"> <li>• Through October 31, SoCalGas has completed meetings with 21 Tribes (18 Federally Recognized Tribes, and 3 Non-Federally Recognized Tribes) in service territory and established a point of contact for Low Income decision programs.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Success:</b> Participated in Pomona's 6th Annual Indigenous Peoples Day at Toibingna, and City of Los Angeles Indigenous Peoples Day celebrations.</li> <li>• <b>Success:</b> Presented to Tribal Alliance of Sovereign Indian Nations (TASIN), an intergovernmental association compiled of 13 federally recognized tribal governments throughout Southern California.</li> <li>• <b>Success:</b> Introductory meeting held with United American Indian Involvement (UAI) Tribal Organization.</li> <li>• <b>Working with Success:</b> Continuing to work with Tribes, as well as Community Based Organizations specific to Tribal communities to establish memos of understanding to assist in providing information on programs to the community through their organization and at Tribal events such as Pow Wows.</li> <li>• <b>Challenge:</b> Identifying non-federally recognized Tribes.</li> </ul>

# SoCalGas Tribal Community Landscape

- SoCalGas has 18 federally-recognized Tribes in its service territory.
  - Of the 18 Tribes, **10 have natural gas service\*** provided by SoCalGas.
    - These 10 tribes have a total of 16,689 natural gas meters of which 93% are on leased land – with no certainty that the land occupant is a Tribal member.

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

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

- SoCalGas has with and established a point of contact with 3 non-federally-recognized Tribes in its service territory.

<b>Fernandeno Tataviam Band of Mission Indians</b>	<b>Gabrieleno (Tongva) Band of Mission Indians</b>
<b>Juaneno Band of Mission Indians</b>	

# SoCalGas Tribal Segment Reporting

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

Southern California Gas Company

October 2023

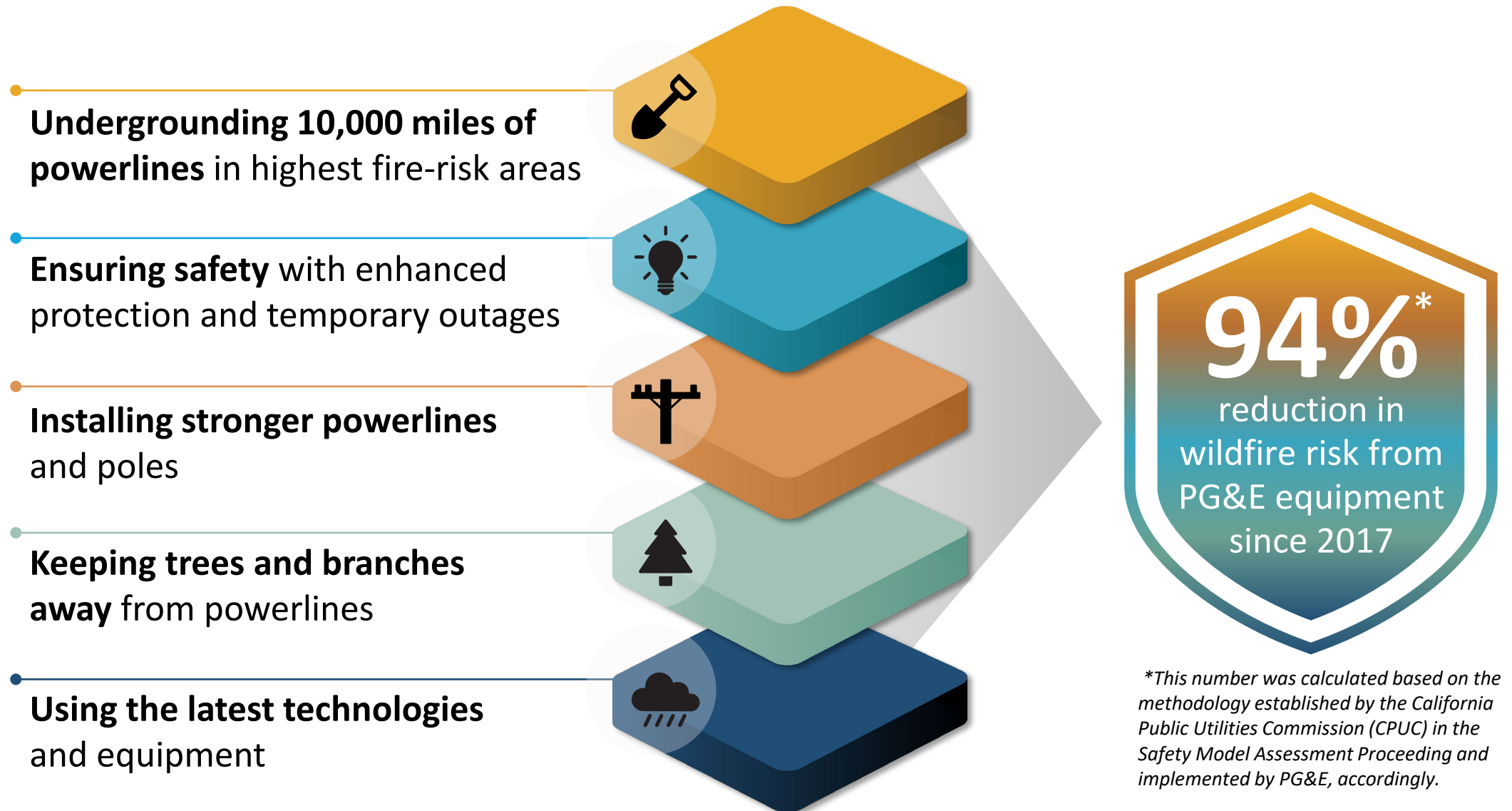
ESA Main (SF, MH, MF in-unit)											
Customer Segments	# of Households Eligible* [1]	# of Households Treated [17]	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Household (Energy Saving and HCS)	Avg. Energy Savings (kWh) Per Treated Household (Energy Saving Measures Only)	Avg. Peak Demand Energy Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Household (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Household (Energy Saving Measures Only)	Avg. Cost Per Treated Household
Location											
Tribal [8]	35	11	31%	162	6.8%				8.4	13.9	\$ 872

SoCalGas uses geographic boundary information to identify federally recognized tribal areas in conjunction with an augment to the ESA application to allow for customer to self-identify as a member of a tribal community.

# PSPS Ongoing Activities



# Layers of Safety Protect Customers From Wildfires



# How Are Customers Notified for a PSPS?

## When We'll Notify

**Watch** ✓ 48-24 hours before power is turned off

**Warning** ✓ 4-1 hours before power is turned off

✓ When power is turned off

✓ After weather has passed

✓ If estimated restoration time changes

✓ Daily until power has been restored

## How We'll Notify

**Automated calls, texts and emails (available in 16 languages).**

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

 @pacificgasandelectric

 @pacificgasandelectric

 @PGE4Me

## How To Receive Notifications For Any Address

Anyone can sign up for **address alerts in 16 languages** to receive PSPS notifications for any location, such as their work or child's school.

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

*Annual registration is required.*

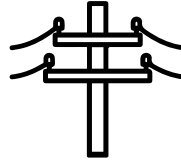
# 2023 Public Safety Power Shutoff (PSPS) Overview

On August 30-31 and September 20, PG&E enacted PSPS events due to weather conditions that could potentially cause a wildfire.



**Customers  
Impacted**

~5,099



**Miles of Powerlines  
Patrolled**

704



**Community  
Resource Centers**

16 open with over  
1,544 customer visits



# PSPS Impacts Year-Over-Year

**We continue to refine PSPS to make it more targeted and less impactful.** With wildfire safety work, PSPS as a measure of last resort will continue to decline.

	2019		2020		2021		2022	2023 YTD	
	PSPS Events	Customers Impacted	PSPS Events	Customers Impacted	PSPS Events	Customers Impacted	N/A	PSPS Events	Customers Impacted
Systemwide	7	2,000,000	6	650,000	5	80,000	-	2	5,000






# Customer Resources and Support for PSPS Outages and EPSS

## Portable Battery Program

EXPANDED ACCESS


Supporting eligible customers with fully subsidized portable battery solutions

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

## Generator and Battery Rebate Program

EXPANDED ACCESS

Rebates for eligible customers to purchase a qualified generator or battery

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

## Self-Generation Incentive Program

Rebates to help customers save on energy storage systems for their business

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

## Disability Disaster Access and Resources

Emergency preparedness planning, portable batteries, and support for customers requiring additional accommodations

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

## Fixed Power Solutions

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

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

# 2023 SCE PSPS OVERVIEW



January - October 2023	Statistics	Activations*	Customer Interruptions	Circuit Interruptions	Customer Minutes of Interruption
	2023 Fire Season	4	25,509	42	~11k

\*4 PSPS activations include 2 (with customer de-energization) and 2 (no customer de-energizations).

# MITIGATING IMPACTS OF PSPS -SCE

## Customer Care Programs Update as of December

### 2023 COMMUNITY CARE RESOURCES

#### 64 COMMUNITY RESOURCE CENTERS (CRC)

Contracted and available based on potential shutoff locations. Location and hours listed online before shutoffs.

#### 8 COMMUNITY CREW VEHICLES (CCV)

Can be deployed rapidly for remote locations. Location and hours listed online before shutoffs

#### 8 RESILIENCY ZONE SITES

Enables backup power generation at certain essential sites in remote communities

#### 9 RESILIENT CRCs

CRCs that have or are in the process of installing a transfer switch and/or have a backup generator



The CCBB program offers eligible customers a free portable battery and solar panel to power medical devices during PSPS events. The program expanded in September 2022, reaching additional customers, with over 14k batteries delivered since its inception. Customers in HFTDs can receive a \$150 rebate for portable batteries, a \$200 rebate for portable generators, and a \$600 rebate for portable generators if enrolled in CARE/FERA or Medical Baseline Allowance. The Statewide Self-Generation Incentive Program (SGIP) is also available.

- Partnered with the California Foundation of Independent Living Centers (CFILC) to provide enhanced support to customers with disabilities before, during and after PSPS.
- Launched and completed the Access & Functional Needs (AFN) Self-Identification Survey in HFRA. Surveyed over 1.1M households in HFRA.
- Continue to expand partnerships with local food banks to provide food support.
- In 2023, CCBB deployed 3,982 batteries and distributed 14,187 free portable backup batteries since program inception.
- Implemented the In-Event Battery Loan Pilot in 2023 to assist eligible AFN customers during PSPS events.
- Granted 1,961 Portable Power Station Rebates and 462 Portable Generator Rebates.

# SDG&E PSPS Support Services

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

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

Community  
Resource Centers



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

Tribal  
Communities



- Partnerships with 211 San Diego/Orange County United Way
- Direct support from 1,000+ orgs, 24/7/365, over 200 languages

Centralized  
Resource Hub



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

Pantry & Warm  
Food



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

Transportation



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

Hotel Stays



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

Wellness Checks

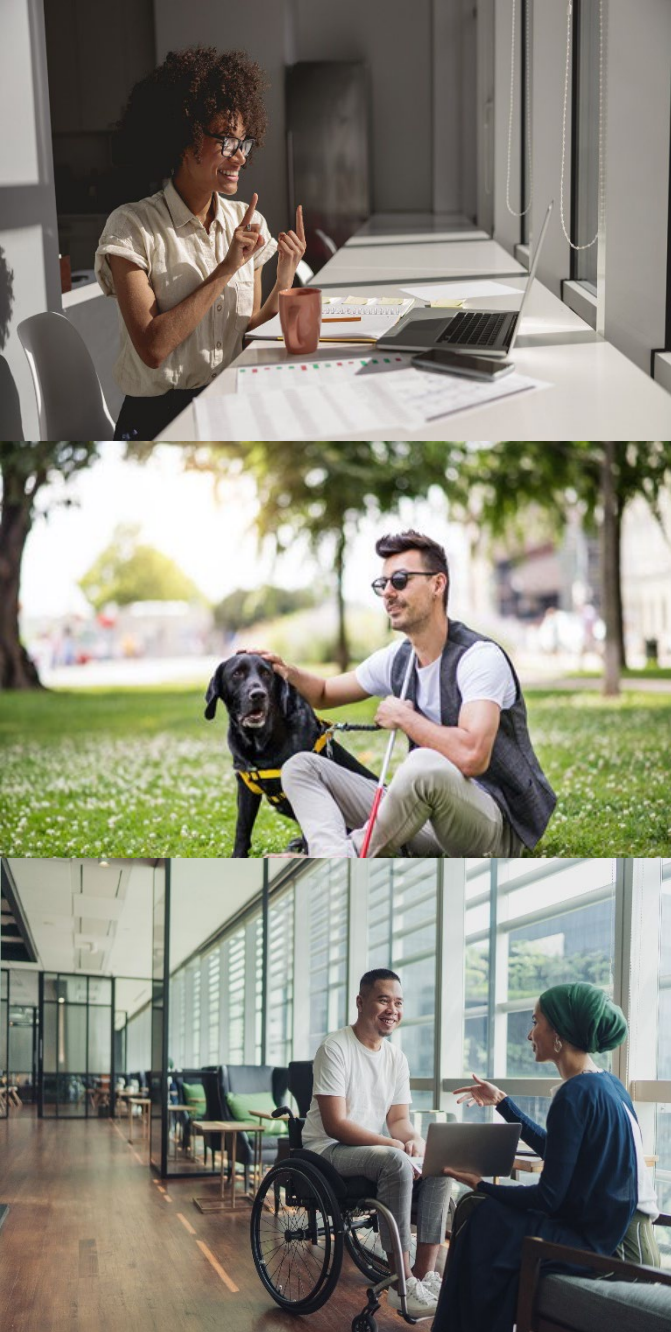


- ~50 CBOs within SDG&E's Energy Solutions Partner Network
- Amplified PSPS notifications (including ASL) to reach AFN customers in HFTD

CBO Engagement







# 2023 AFN Enhancements

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



## AFN Self-Identification

- Implemented AFN Self-ID Webform with dedicated banner on SDG&E homepage
- 2 new identifiers added to expand awareness of AFN population
- 34% total AFN with ~8,000 through self-ID



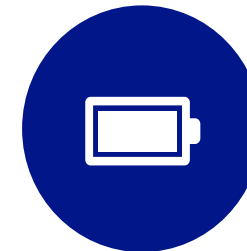
## Accessibility

- Video Remote Interpreting (VRI) available for Branch Offices, CRCs and Customer Service Field Staff
- Accessible Hazard Alert System
- Dedicated accessibility web page on [sdge.com](https://sdge.com) & email [ADAsupport@sdge.com](mailto:ADAsupport@sdge.com)



## Medical Baseline

- Grossmont Hospital partnership
- SDG&E Alerts App and contact info. updates
- Targeting Veterans who use qualifying medical devices



## Generators

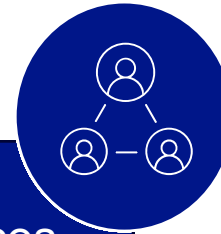
- No cost Portable Power Station for qualifying individuals of MBL & select AFN
- Rebates from \$150 - \$450 available

# 2023 SDG&E PSPS Season Overview

SDG&E executed 1 Public Safety Power Shutoffs (PSPS) protocol from October 29 - 31



No customers were de-energized but potentially 1,109 customers with ~75 MBL in scope.



AFN Support Services were activated and on standby to support:

- 211 SD
- FACT
- Salvation Army
- 4 CRCs



No circuits were de-energized and there were no customers de-energized.



# Joint IOUs Unspent Funds for Energy Savings Assistance Program

# PG&E's Unspent ESA Program Funds



Total Remaining Unspent Funds (\$ in millions)	
Remaining unspent funds as of December 31, 2022 <sup>[1]</sup>	\$32.51
Unspent & uncommitted funds used to offset 2023 budget revenue requirement	- \$0
2023 Revenues Collected (Jan - Oct)	+ \$143.53
2023 Expenses (Jan - Oct)	- \$114.04
2023 Accrued Interest (Jan - Oct)	+ \$2.19
2023 Budget Transfer from SASH/MASH <sup>[2]</sup>	<u>+ \$9.57</u>
Total remaining unspent funds as of October 31, 2023	\$73.75

1. Committed unspent fund carry forward to 2023 according to fund shifting rules for MF CAM, SPOC, Pilots, Studies, and Pilot Plus and Pilot Deep activities.
2. \$9.6M of remaining SASH and MASH Unused Administrative and Incentive Program Funds in the CSIBA was authorized to transfer to fund ESA programs per AL 7028-E, approved 11/02/23.



# SCE's Unspent Funds for ESA Program

Total Remaining Unspent Funds (\$M)		
Unspent Funds through 12/31/22 [1]	\$	25.48
2023 Revenue Collected (Jan – Oct)	\$	50.94
2023 Expenses from (Jan –Oct)	\$	(18.52)
2023 Accrued Interest (Jan- Oct)	\$	1.90
<b>Total Unspent Funds through 10/31/2023</b>	<b>\$</b>	<b>59.80</b>

1. This is the remaining Unspent Funds amount from 2009-2022 program cycles through October 31, 2023.

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

# SDG&E's Unspent Funds for ESA Program



Total Remaining Unspent Funds (\$ in millions) [1]	
Remaining unspent funds as of December 31, 2022 [2]	\$ 20.66
Remaining unspent & uncommitted funds used to offset 2023 revenue requirement [3]	\$ (0.33)
Revenues collected through YTD October 2023	\$ 18.05
Expenses incurred through YTD October 2023 [4]	\$ (15.34)
Total remaining unspent funds as of October 31, 2023	\$ 23.04
Remaining ESA CAM committed funds as of October 31, 2023	\$ (0.85)
Remaining ESA MFWB committed funds as of October 31, 2023	\$ (5.05)
Pre-2023 unspent & uncommitted funds to offset 2024 PPP rates [5]	\$ (15.00)
<b>Total remaining unspent &amp; uncommitted funds as of October 31, 2023 [6]</b>	<b><u>\$ 2.14</u></b>

1. Unspent funds are only available for ESA activities.

2. As reported in the 2022 Annual Report, the remaining unspent funds as of December 31, 2022 of \$20.66M includes \$2.81M for ESA CAM (Table 1A).

3. D.21-06-015, OP 114, SDG&E is instructed to use unspent and uncommitted funds before requesting new funds. SDG&E utilized \$2M in unspent and uncommitted PGLIEEBA funds to offset the 2023 authorized funding in the 2023 Public Purpose Program rates.

4. Reflects expenses from ESA Tables 1 + 1A, net of manual adjustments.

5. In accordance with D.21-06-015, OP 114, SDG&E is using pre-2023 unspent and uncommitted funds recorded in LIEEBA and PGLIEEBA of \$8.5 million and \$6.5 million, respectively, to offset the 2024 authorized budget in the 2024 Public Purpose Program electric and gas rates. This is reflected in SDG&E AL 4291-E and AL 3247-G submitted on September 29, 2023, and October 31, 2023, respectively.

6. Does not include YTD interest income recorded in the ESA balancing accounts.

# SoCalGas Unspent/Uncommitted funds for ESA



## SoCalGas Remaining Unspent Funds

Total Remaining Unspent Funds (\$M)	
Remaining 2009-2016 Unspent Funds [1]	\$125.15
2017-2020 Revenues Collected	\$491.69
2017-2020 Total Expenses [2]	\$394.62
2017-2020 Unspent Funds [1]	\$97.07
<b>Total Remaining Unspent Funds through PY 2020 [1]</b>	<b>\$222.22</b>
2021 – 2022 Revenues Collected	\$9.12
2021 – 2022 Total Expenses [2]	\$220.03
<b>Total Remaining Unspent Funds through PY 2022 [1]</b>	<b>\$11.31</b>
2023 Revenues Collected	\$62.76
2023 Total Expenses [3]	\$57.39
<b>Total Remaining Unspent Funds as of 10/31/2023 [1]</b>	<b>\$16.68</b>
<u>Footnotes</u>	
[1] Unspent Funds related to Revenues Collected	
[2] Total Expenses from Annual Reports	
[3] Total Expenses from October 2023's Monthly Report - Summary Table	
Notes:	
- Unspent funds can only be used for ESA Program activities or returned to ratepayers.	



# State of Disconnections and Arrearage Management Plans (AMP)

# SCE Disconnections Status and AMPs

## Arrearage Management Plan (AMP)

- Number of customers enrolled: 157,475
  - Percentage of eligible households enrolled: 12%
  - Number successfully completed 12-month program launched since Feb. 2021: 8,597
    - 5% of customers enrolled in AMP completed the 12-month enrollment
    - For those that do not complete the 12-months, the average length of enrollment is 6 months
- Total arrearages: \$240M
- Total amount forgiven: \$71M

## Disconnections/Reconnections

Residential disconnections 2023 <sup>1</sup> :	29,553
Residential Customers reconnected:	28,053

<sup>1</sup>January to August 2023

## AMP Case Management

To manage customer satisfaction in AMP, SCE has implemented an outbound calling initiative to customers who have gone on the NEM tariff and no longer eligible to participate in AMP to provide those customers with other options to assist with their arrearage balances.

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

### AMP NEM outreach (outbound calls)

- 2023 (YTD)\* – 649 calls completed



### AMP Delayed Billing outreach

- 2023 (YTD)\* - 2,575 letters mailed



# PG&E Disconnections Status and AMP – Through October 2023



## Arrearage Management Plan (AMP) <sup>[1]</sup>

- Number of customers enrolled since launch : 380k
  - Gross percentage of eligible households enrolled: 88%
  - Number successfully completed 12-month enrollment since program launched in Feb. 2021: 52K
    - Percentage of total enrollments since launch that have successfully completed AMP: 14%<sup>[2]</sup>
- Average length of participation for customers who do not finish the 12 months is 3 months.
  - Number of customers unenrolled due to receipt of CAPP funding in 2023: 3K
- Total amount forgiven since program launch : \$213M

## Disconnections

PG&E has resumed normal collection and disconnection practices for all residential customers. PG&E is staying within the 3.5% annual disconnection rate for specific volumes, for additional information, please refer to the November 2023 Monthly Disconnect Data Report <sup>[3]</sup>.

PG&E has implemented additional collection touchpoints to support customers with outstanding arrearages which includes:

- New customer outreach efforts through e-mail, text, letters, and dialer campaigns,
- Live agent calls to offer customer programs and payment options,
- New field residential posting pilot,
- LIHEAP and AMP marketing campaigns, and
- Qualitative research project on customer payment behaviors.

## AMP Case Management

### AMP Missed Payment Notifications

- PG&E continues to contact customers upon their first missed payment of current billing charges. PG&E also continues to conduct AMP eligible callout campaigns and includes AMP messaging in CARE/FERA outreach. Note: To date, PG&E has enrolled 88% of it's total eligible population.

<sup>[1]</sup> Data as of 10/31/23

<sup>[2]</sup> Does not include customers who received CAPP funding that covered the remaining AMP balance

<sup>[3]</sup> R.18-07-005 [Pacific Gas and Electric Company's December 2023 Monthly Disconnect Data Report](#), reporting 2023 activity through October 2023, last accessed on December 11, 2023

# SDG&E Disconnections & AMP Status

## Arrearage Management Plan (AMP)\*

- Number of customers enrolled: 12,489
- Percentage of eligible households enrolled: 27%
- Number of customers successfully completed 12-month program since Feb. 2021 launch: 6,988
  - 19% of customers enrolled in AMP completed the 12-month enrollment
  - For those that do not complete the 12 months, the average length of enrollment is 3 months
- Total arrearages actively enrolled in AMP: \$20.8M
- Total amount forgiven: \$23M

\*January – October 2023

## Disconnections

Number of disconnections, January 2021 – October 31, 2023: 53

Resumption of residential credit collection efforts started in Q3 2023.

## AMP Marketing

### Targeted Communications

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

### General Outreach

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

## Neighbor-to-Neighbor\*

Number of customers receiving N2N funds: 8,158

Total Amount Spent: \$4,447,143.69

\*January – October 2023

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

# SoCalGas Disconnections and AMP Update



## Arrearage Management Plan (AMP)\*

- Number of customers enrolled (2/1/21 – 10/31/23): 238,070
  - Percentage of eligible households enrolled: 54%
- Total arrearages: \$173.5M    Total amount forgiven: \$46.2M
- Number and percentage of enrolled customers who successfully completed AMP

AMP Numbers	Total Enrolled	Active	Completed	Terminated	% Active	% Completed	% Terminated
Enrollment date 2-1-21 through 12-31-22	116,804	1,022	35,913	79,869	1%	31%	68%
Enrollment Date 1-1-23 through 10-31-23	121,266	90,488	73	30,705	75%	0%	25%
Total	238,070	91,510	35,986	110,574	38.5%	15%	46.5%

- Average length of participation for customers who did not complete the 12-month program
  - For those enrolled between 2/2/21 – 10/31/23, the average length of enrollment in the program was 4 months

\*Data through 10/31/23, updated on 12/4/2023

## Disconnections

Number of disconnections, Jan 2021 – October 31, 2023: 19  
Resumption of residential credit collection efforts began in Q3 2023

## AMP Case Management

SoCalGas is working to implement notifications to customers upon missing payments while enrolled in AMP





# ESA and Demand Response

# ESA - Demand Response 5-Year Recap

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

	2019	2020	2021	2022	YTD 2023*
<b>SCE</b> For additional DR program information, please visit: <a href="https://www.sce.com/demand-response-programs-for-homes">Demand Response Programs for Homes (sce.com)</a>	463	218	294	285	41
<b>SDG&amp;E</b> <sup>[1]</sup> For additional DR program information, please visit: <a href="https://www.sdge.com/demand-response-for-your-home">Demand Response for Your Home (sdge.com)</a>	4	5	30	8	13
<b>PG&amp;E</b> For additional DR program information, please visit: <a href="https://www.pge.com/energy-incentive-programs">Energy incentive programs (pge.com)</a>	14	360	514	1,168 <sup>[2]</sup>	943 (thru Nov 2023)

\*January – October 2023

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

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