

Low Income Oversight Board

1st Quarterly Meeting

March 14, 2024

9:30 AM – 4:00 PM



California Public
Utilities Commission

Pursuant to Sec. 382.1 of the California Public Utilities Code, the purpose of the Low Income Oversight Board (LIOB) is to advise the California Public Utilities Commission on low-income electric, gas, and water corporation customer issues and to serve as a liaison for the Commission to low-income ratepayers and representatives.

Quarterly meetings are opportunities for board members to meet and discuss topics related to low-income customer issues. All LIOB meetings are open to the public.

In-Person Meeting Information

Culver City Hall
Mike Balkman Council Chambers
9770 Culver Blvd.
Culver City, CA 9023

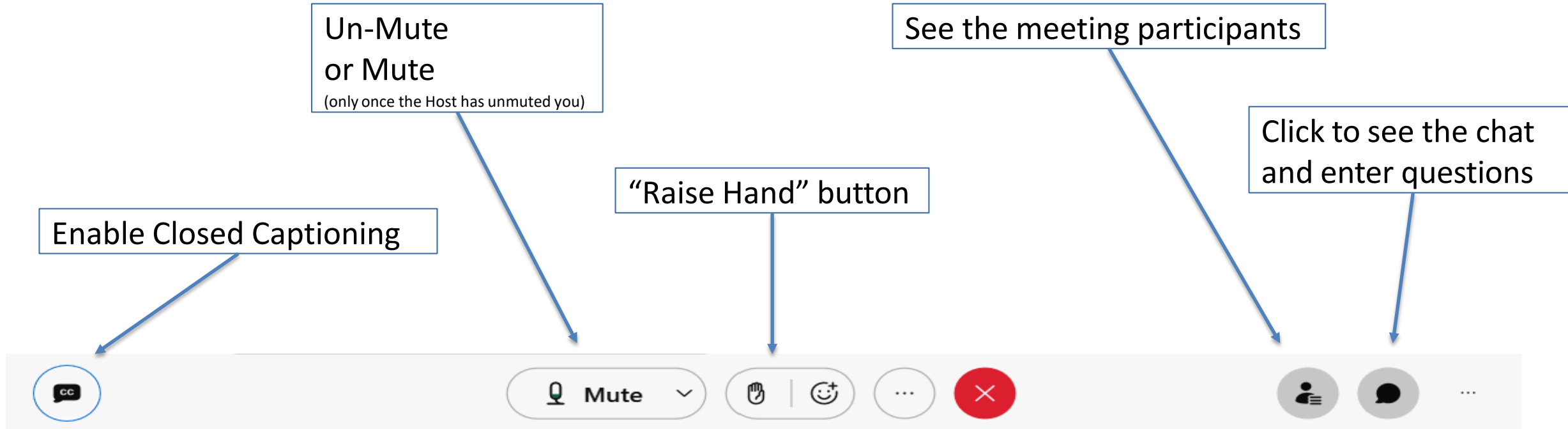
- Members of the public or community based organizations will be able to provide comment to the Low Income Oversight Board during **Agenda Item 4**, or if requested by the Board.

Webex Meeting Information

- All attendees will be **automatically muted** upon entry. Only the Host can unmute attendees and will unmute those who request to speak via the “Raise Hand” Feature.
- Members of the public or community based organizations will be able to provide comment to the Low Income Oversight Board during **Agenda Item 4**, or if requested by the Board.
- The chat box feature should not be used for formal comment. Attendees can use the chat box to message the host to ask general questions, note technical issues, or request to speak.
- This board meeting is a formal CPUC event and will be **recorded** for reference purposes. Recording is available upon request from Gillian.Weaver@cpuc.ca.gov



Webex Webinar Participant Guide



Gray means "on" (Not Muted, Sharing Video)

Red means "off" (Muted, Not Sharing Video)

Closed Captioning provided by Webex:



Low-Income Oversight Board

Board Member Introductions



California Public
Utilities Commission

LIOB Board Introductions



Benito Delgado-Olson
Chair



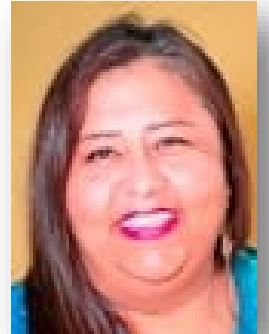
Maria Stamas
Vice Chair/Public



Robert Castaneda
Public



Lisa Castilone
Public



Lourdes Medina
Public



Paul Irwin
Public



Patricia Watts
**Weatherization
Contractor**



Jason Wimbley
CSD



John Tang
Water



Hollie Bierman
Electric/Gas

Approval of the December 15, 2023 4th Quarterly Meeting Minutes



California Public
Utilities Commission

Item 3: Election of the LIOB Chair and LIOB Vice-Chair



California Public
Utilities Commission

LIOB Charter

ARTICLE SIX: OFFICERS

- 6.1 Officers

The LIOB shall have a Chair and a Vice-Chair, both of whom shall be members of the Board. These officers shall be elected by the members of the Board to serve a term of one year, and they may be re-elected. An officer shall continue to hold office until a successor has been elected and assumed office. However, if an officer ceases to be a member of the Board, the officer's appointment shall terminate.

- 6.2 Duties

The Chair shall be responsible for the general supervision and direction of the affairs of the Board. The Chair shall preside at all meetings of the Board. In the absence of the Chair, the Vice-Chair shall perform the duties of that office. If the Chair and Vice-Chair are unavailable for a meeting, the Chair shall appoint a temporary Chair for that meeting. The officers shall perform such other duties as from time to time may be prescribed by the Board.

Item 4: Public Comment

Webex Public Comment

Please use the “Raise Hand” feature in Webex window to request to speak



Public comment is intended to provide an opportunity for members of the public who wish to address the board on any topic. Members of the board are not allowed to take any formal action on an item not on the agenda. If possible, it is requested that public comment be limited to 2 minutes per speaker

PACE


Organization Overview



We believe in social and economic justice for all.

Our mission is to create economic solutions to meet the challenges of employment, education, housing, environment & business development for LMIs in the Pacific Asian & other diverse communities.

Our mission & comprehensive, multi-pronged programming reflects our core values & commitment towards combating racism through service.



Early Childhood Education

As one of the largest Head Start providers serving Los Angeles, PACE Education offers children ages 0-5 with comprehensive early childhood education services incorporating health, nutrition, mental health, and disability services. We also connect families with social services while teaching parents advocacy and leadership skills.



Energy & Environmental Services

Sustainability and the environment have been on PACE's agenda since 1981. PACE Energy provides outreach, energy and environmental conservation education, weatherization services, and utility bill assistance to low-income individuals and families in the greater Los Angeles area.



Workforce Development

Since 1975, PACE has helped job seekers attain economic mobility by providing comprehensive employment services including career counseling, training, and job placement services. We also provide training and recruitment services for businesses and employers.



Business Development

PACE Business provides business counseling, technical assistance, and training to low-income ethnic minority entrepreneurs and small business owners. As a certified CDFI and official CalCAP and iBank lender, we also provide capital and affordable financial products to businesses across L.A. County.



Housing

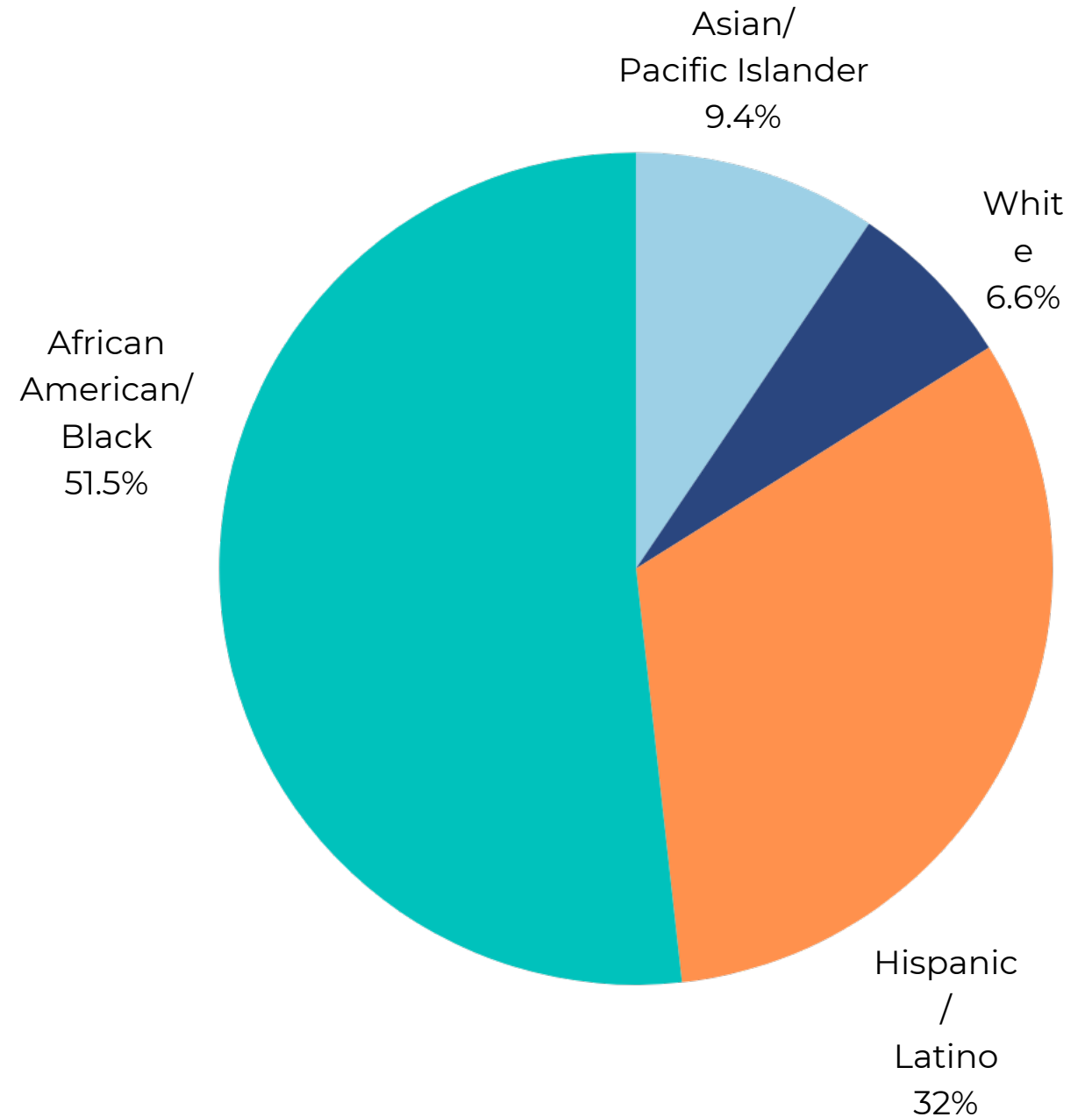
Since 1984, PACE has developed affordable housing units to provide economic relief to housing burdened residents of Central Los Angeles.

Not only is the affordability of some units as low as 20% AMI, but units are also set aside for individuals experiencing homelessness, older adults, individuals with disabilities, and transitional youth.



Client Demographics

FY
21-22



Our Impact

FY
21-22



EDUCATION

1,926

Children &
Families Served



ENERGY

26,892

Utility Payment
Assistance Clients



EMPLOYMENT

1,800

Workers Trained &/or
Placed/Services Received



BUSINESS

3,493

Entrepreneurs
Trained/Counseled



HOUSING

127

Affordable
Housing Units

Our Impact

1975 -
2023



EDUCATION

10,000,000+

Meals Prepared



ENERGY

~1,000,000

Households Served



EMPLOYMENT

200,000+

Workers Trained &/or
Placed/Services Received



BUSINESS

54,000+

Entrepreneurs
Trained/Counseled



HOUSING

~1,000

Affordable
Housing Units

PACE Energy

Energy Services

California Department of Community Development & Services (CSD)

- Served 142 zip codes with a total population of 2,970,795 through LIHEAP/DOE Weatherization Assistance Program (2022)
- Outreached/enrolled 29,618 households in LIHEAP/DOE WAP (2017-2022)
- Assisted 83,690 households in paying their electric/natural gas bills amounting to \$45,246,916 (2022-2024)
- Helped 5,397 households pay their water/waste water bills amounting to \$5,333,246 (2022-2024)

Energy Services (cont.)

Southern California Edison (SCE) and Southern California Gas Company (SoCalGas) _____

- Covers a majority of utility company service territories in 766 zip codes across Los Angeles, Orange, and San Bernadino counties
- Enrolled 45,089 customers to Energy Savings Assistance (ESA) Program

Los Angeles Department of Water and Power (LADWP) _____

- Conducted outreach to 71,170 LADWP customers and provided energy efficiency education to 14,400 customers (2016-2023)

Energy Advocacy

PACE empowers change through our membership in the following energy advocacy groups:

- Governing Board Member, National Energy & Utility Affordability Coalition
- Co-Chair, Environmental Justice Committee, AAPI Equity Alliance
- Member, Association of Women in Water, Energy and Environment
- Member, City of Los Angeles Equity Strategies Steering Committee
- Member, Clean Energy Access Working Group
- Member, South Coast Air Quality Management District
- Commissioner, President's Advisory Commission on AANHPIs, Health, Equity, and Environment Subcommittee

Recommendations

Recommendation 1

Use AMI instead of Federal Poverty Level to determine eligibility for LIHEAP, DOE WAP and ESA Programs.

- Rationalizes calculation of affordability based on location
- Should be used to facilitate leveraging all low-income energy programs to maximize service delivery

Recommendation 2

Provide grants to multifamily building property owners to install solar PV systems in their buildings.

- Power generated by the system will be used to cover electricity consumption of tenants
- Expand program to include repair/replacement of roofs, upgrade of electrical panels, etc., as well as relocation costs

Recommendation 3

Establish an Outreach & Education Fund.

- To promote energy efficiency programs to DACs/low-income households (electrification, electric vehicles, programs, etc.) using in-language information and events
- Should be implemented by CBOs

Recommendation 4

Multi-Year Capacity-Building Grant for CBOs

- Provide training and other capacity building strategies to raise CBO's weatherization technical knowledge and skills to servicing residential to commercial buildings

Recommendation 5

Create a program to develop green small businesses to ensure a just transition for a carbon neutral economy.

- Provide technical assistance (TA), training, and counseling for green businesses across CA
- Include dedicated funding for local CDFIs for Green Loan Funds & Loan Loss Reserves (LLRs)
- Small business development & access to capital will not only help these underserved small business owners w/ generational wealth transfer, but also allow good quality, living wage green jobs for low income individuals

Questions?

Break

Low Income Oversight Board Energy Division Update

Presented by Kapil Kulkarni, Energy Division Staff
March 14, 2024



California Public
Utilities Commission

Agenda

- **Large IOUs ESA/CARE/FERA program cycle**
 - Mid-cycle recommendations and report
 - ESA Working Group
- **Categorical Eligibility Programs Advice Letter**
- **Low Income Needs Assessment**

Large IOUs ESA/CARE/FERA Program Cycle

- **Mid-cycle recommendations and report**

- Final report was submitted to Energy Division/CPUC at end of 2023
- ED Staff is reviewing the report to identify topics for discussion at ESA WG meetings

- **ESA Working Group**

- March 21, 2024 – Agenda will include discussions on Health, Comfort, and Safety topics, and the Multi-Family program.
- Materials will be available at <https://pda.energydataweb.com>

Categorical Eligibility Programs

- **Joint IOUs submitted an Advice Letter (AL) on 10/13/2023**
 - The advice letter proposes updates to the list of categorically eligible programs based on the study final report.
 - Protests were filed by the Public Advocates Office (CalPA), and jointly by The Utility Reform Network (TURN) and Center for Accessible Technology (C4AT); Joint IOUs then submitted a reply to the protests.
 - ED Staff has suspended the advice letter through September 2024 to allow more time for review, and is currently meeting with these parties and the IOUs to resolve the proposals.

Final report available here:

<https://pda.energydataweb.com/#!/documents/2814/view>

2025 Low Income Needs Assessment

- **Current Activity**

- IOUs have selected Evergreen Economics as study consultant, who are currently developing the research plan

- **Upcoming Activity**

- LINA Subcommittee meeting to review draft research plan on April 12, 2024
- Draft research plan will be posted to PDA and shared with the LIOB

Thank you!

Kapil Kulkarni, Energy Division

Kapil.kulkarni@cpuc.ca.gov

213-620-6453

Subcommittee Reports

- Low Income Energy Assistance Programs (LIEAP)

- Castaneda, Stamas, Watts, Wimbley, Medina, Irwin, Castilone, Bierman

- Legislative

- Stamas, Watts, Castaneda, Delgado-Olson,

- Low Income Needs Assessment (LINA)

- Delgado-Olson, Stamas, Castaneda, Medina

- Water & Climate Change

- Tang, Delgado-Olson, Castaneda, Medina, Irwin

Lunch

ESA Labor Rate Exercise

LIOB Presentation

March 14, 2024





Introduction



Cynthia Bruno Rafferty
Chief Executive Officer



Alexander Kaiser
Corporate Controller



RHA INTRODUCTION



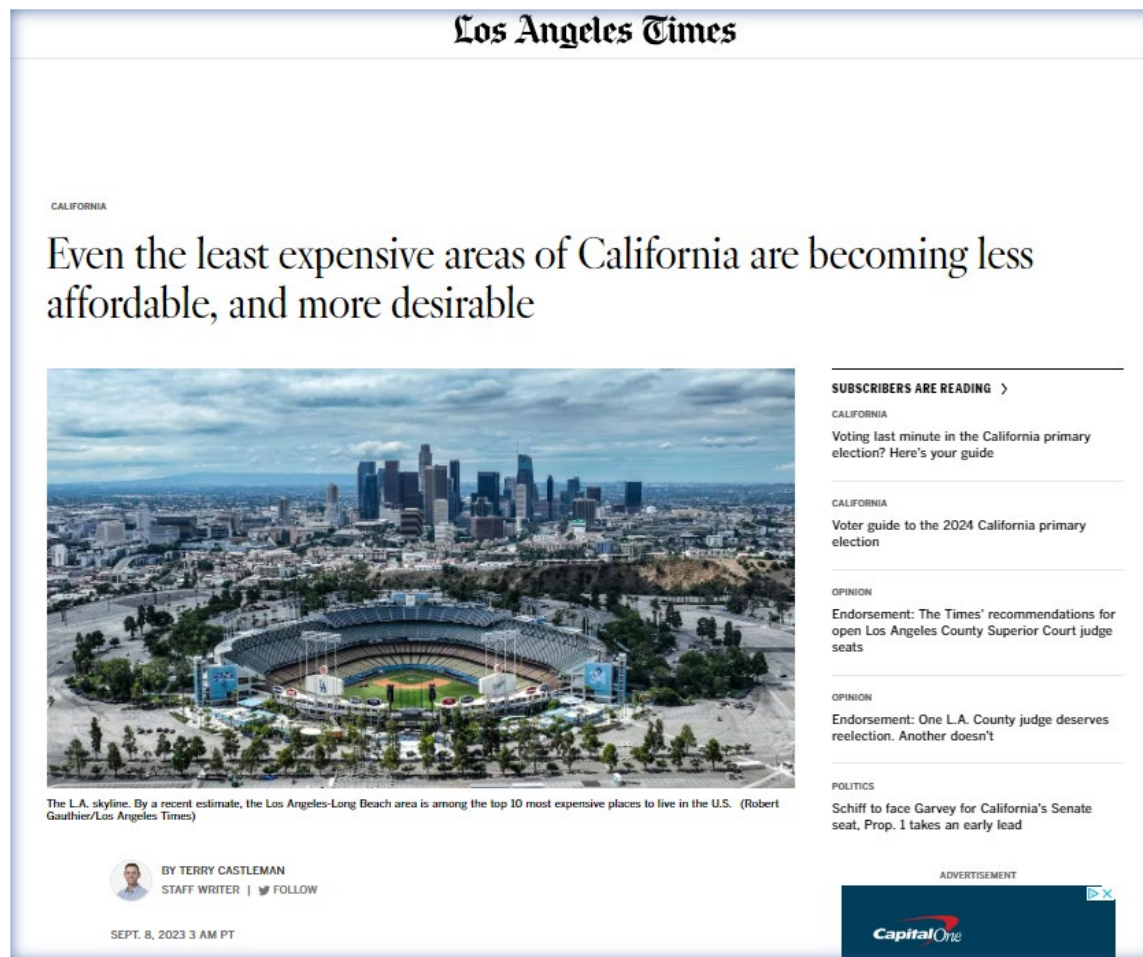


Background



Current Environment

- ESA Contractors represent that reimbursements aren't sufficient
 - Reports are anecdotal
 - Current prices established in ESA RFPs submitted in early 2022
 - Discussion around advances is concerning based upon experience
- Lived experience
 - \$20 minimum wage for fast food workers
 - Increases in insurance, gas, food, etc.
 - Belief that everything is more expensive





Wages Have Increased

- CA Dept. of Housing and Community Development (HCD) Income Limits – Area Median Income (4)

Year	2021	2022	2023	2021 vs 2023
HCD Income Avg.	87K	97K	105K	18K
Increase %		<div></div> 12%	<div></div> 8%	<div></div> 21%

- CPI-W increases (Urban Wage Earners and Clerical Workers)

Year	2021	2022	2023	2021 vs 2023
CPI index	289	310	321	33
Increase %		<div></div> 8%	<div></div> 3%	<div></div> 11%



Caveats

- Intended to:
 - Gather information from a select sample of RHA ESA contractors
 - Understand how contractor costs may differ from current reimbursements on RHA implementer contracts
- Not intended to:
 - Serve as a market study
 - Determine statewide labor rates
 - Call attention to any IOU
 - Disclose existing contracted rates
- RHA facilitated the exercise but did not contribute any data
 - RHA may benefit from improved program performance (Implementer)

Pricing Transparency Exercise



Overview

- In 2017, to gain insight into similar contractor complaints, PG&E Program Team, PG&E Sourcing and RHA engaged in an exercise to systematically understand ESA labor costs
- Pricing model developed for fair reimbursement =
 - Fully-Loaded Labor Rates x Level of Effort + Materials (no mark up)
- Labor Rates were calculated using the same methodology applied here
- Billable time reimburses contractors for all program expenses – not just the employee being billed
 - Adjusted to capture billable time and exclude non-productive time



Data Requested

- Requested submissions from 7 contractors working across California
 - Invited small and medium for-profit and non-profit CBO
- Template requested inputs specific to these areas:
 - Employee Wages: Costs directly attributable to the billable employee (base wage, overtime, incentives, vacation/sick, workers comp, health insurance, retirement, employer taxes)
 - Direct Program Burden: Costs directly associated with program participation separate from employee costs (facilities, transportation, corp. insurance, training, licenses, technology, project supplies, safety equipment, warehouse, program management, program admin support, ISNET)
 - Corporate Overhead: Portion of non-program costs of the business allocated to the program (Executives, HR, accounting, finance, IT, business development)
 - Profit – 10%
-



Data Analysis

- Received submission from 6 of 7 contractors invited to participate
- Reviewed data for accuracy and clarified entries that weren't reasonable
- Applied a consistent standard of 1400 billable hours for field employees (6 billable hours a day) and 1600 billable hours for administrative employees (7 billable hours a day)
- Eliminated any outliers that didn't correspond with a normal program range (both high and low) after corrections
- Averaged all submissions by ESA role



Findings



Statistics by ESA Role*

Role	Avg. Rate	Low Rate	High Rate
Call Center Representative	\$ 131.16	\$ 92.40	\$ 150.49
Energy Specialist	\$ 169.09	\$ 142.08	\$ 192.61
HVAC Assistant/Helper	\$ 166.14	\$ 112.93	\$ 189.69
HVAC Journeyman / HVAC Apprentice	\$ 174.20	\$ 119.71	\$ 195.08
HVAC Technician	\$ 182.26	\$ 126.49	\$ 200.47
Weatherization Specialist	\$ 166.93	\$ 131.94	\$ 187.55
Weatherization Specialist - Insulation installer	\$ 160.94	\$ 113.28	\$ 189.22
Weatherization Specialist - NGAT	\$ 158.95	\$ 133.27	\$ 187.55
Weatherization Specialist/ NGAT Blended Rate	\$ 162.94	\$ 132.60	\$ 187.55

*Average, low and high of contractor inputs – does not reflect contracted labor rates.



Findings

- Unprecedented period of inflation in 2022 and 2023, following RFP bid submissions, which increased wages and costs statewide.
- We believe there is agreement around the value contractors play as the program's backbone and that they should be reimbursed fairly.
- We believe there is enough data to support IOUs revisiting contracted labor rates with contractors to determine whether increases are appropriate.
- We are aware of the tension between increasing labor rates and IOUs achieving energy savings goals.
 - Possibly they cannot do both.
 - If so, how do they prioritize?



Questions or Comments?



Contact Us

- Let us know if you have questions!
 - Cynthia Rafferty – cbrafferty@rhainc.com
 - Alex Kaiser – akaiser@rhainc.com



Joint IOUs Program Highlights

Low Income Oversight Board Meeting
March 14, 2024

Webex Meeting Format

PG&E 2023 Program Summary– As of December 2023

CARE

Enrollment: 1,402,942
Enrollment Rate: 100%
Discounts: \$997,985,995
% Adm. Expenditure: 68%

FERA

Enrollment: 38,295
Enrollment Rate: 23%
Discounts: \$17,148,000
% Adm. Expenditure: 94%

ESA Main

Energy Savings:

- 6,603 kW
 - 204% YTD
- 28,571,018 kWh
 - 80% YTD
- 1,276,656 therms
 - 88% YTD

Homes treated: 65,519

- 108% YTD
- % Expenditure: 94% YTD

Additional Q4 Highlights

- **Northern Multifamily Whole Building Program (N. MFWB):** Program fully launched in July 2023 and has treated 3,468 in-unit properties, enrolled 140 multifamily properties, and audited 47 whole building projects through December 2023. The SPOC program has referred 399 projects to 46 other programs through December, and 60 referrals were converted to applications. PG&E plans to carry-over \$28.5M in unspent current PY funds to PY 2024.
- **Pilot Plus/Pilot Deep:** PP/PD continued a gradual ramp-up of project installations through end of year 2023. The Pilot grew capacity from one project initiated in 2022, to 131 initiated through December 2023, and is currently on pace to begin 2024 installing roughly 20 projects per month. PG&E plans to carry-over \$12.5M in unspent current PY funds to PY 2024.
- **ESA Tribal**
 - **Tribal Outreach Grant Program:** Tribal grantees continued conducting outreach efforts, which resulted in a total of 51 tribal members referred to the ESA program.
 - **ESA Tribal Homes Treated:** An increase from two homes treated in 2022 to 226 homes treated in 2023.
- **FERA:** FERA Enrollment Barriers for PG&E's service territory study commenced in Q4 2023, with primary activities planned for PY 2024 through Q1 2025 in PG&E's service territory.
- **AMP/Disconnections:** Since AMP program launch in February 2021, 389k customers have enrolled with a total of \$226M in arrears forgiven. 51k customers successfully completed the AMP program, 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 – As of December 2023

CARE

- Customers Enrolled: 1,289,493
- Enrollment Rate: 98%
- Newly Enrolled Customers: 347,275

FERA

- Customers Enrolled: 30,397
- Enrollment Rate: 14%
- Newly Enrolled Customers: 10,625

ESA

- Homes Treated: 13,192
- Energy Savings: 7,237,703 kWh

Homes Treated includes ESA, Pilot Plus/Pilot Deep, and Building Electrification

Energy Savings includes ESA, MFCAM, Pilot Plus/Pilot Deep, and Building Electrification

MF CAM/MFWB

The Southern MFWB program launched on July 1, 2023. By the end of December, the Southern MFWB implementer completed 69 property enrollments and 38 property assessments. They continue engaging with a pipeline of 791 property level leads and 6213 residential inquiries. SCE has continued collaborating with the implementer on program related tasks and lead referrals.

Additional Highlights

Tribal

- Throughout the year, the tribal task force team actively engaged in 21 events showcasing SCE's dedication to fostering meaningful partnerships and enhancing engagement within tribal communities. Moving forward, the intention is to sustain these outreach endeavors and extend support to non-federally recognized tribal communities.

AMP

- As of December 2023, AMP had 155,374 customers enrolled in the program, with a total of \$71M forgiven since program launch.

SDG&E 2023 Program Summary– As of December 2023

CARE	FERA	ESA ¹	MF CAM
<ul style="list-style-type: none"> Customers Enrolled: 338,772 Enrollment Rate: 112% New enrollments: 72,873 % Admin Expenditures: 89% 	<ul style="list-style-type: none"> Customers Enrolled: 10,467 Enrollment Rate: 24% Newly Enrolled: 3,060 % Admin Expenditures: 88% 	<ul style="list-style-type: none"> Homes Treated: 4,082 <ul style="list-style-type: none"> 35% YTD kWh Saved: 656,889 <ul style="list-style-type: none"> 33% YTD Therms Saved: 3,091 <ul style="list-style-type: none"> 4% YTD 	<ul style="list-style-type: none"> # of Properties: 17 <ul style="list-style-type: none"> 121% YTD kWh Saved: 203,993 <ul style="list-style-type: none"> 102% YTD Therms Saved: 21,071 <ul style="list-style-type: none"> 585% YTD

Additional Highlights

The Southern Multifamily Whole Building (MFWB): Program fully launched in July 2023. In 2023, the Program enrolled 69 whole building projects (SDG&E 12, SCE 1, SoCalGas 21, SCE and SoCalGas 35), completed 38 property assessments and began installing basic measures for in-units as of December. Additionally, the Southern IOUs collaborated with RHA to establish a strong pipeline of 745 property leads.

Tribal Grants/Outreach: SDG&E has offered mini grants to 7 tribes. Three have successfully completed financial documents and have received the grants. Two 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 December 31, there are 18,472 AMP customers with total arrearages at \$36.7M. 7,692 customers have successfully completed the program with a total of \$26M forgiven.

SDG&E's Neighbor-to-Neighbor program assisted 8,728 customers with pledge dollar totals of \$4.8M to assist customers with arrearages.

¹ Includes MF In-Unit treatments

SoCalGas Program Summary – As of December 2023



CARE

- Customers Enrolled: 1,836,582
- Enrollment Rate: 110%
- Newly Enrolled Customers: 342,753

ESA Main Program*

- Homes Treated: 48,752
70% YTD
- Therms Saved: 976,176
(78%) YTD
- % Expenditure: 71% YTD

MF CAM

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

Additional Highlights

Tribal

- Through December 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 through community-based organizations working in tribal communities and participation in events serving tribal communities.

Disconnections/AMP

- 264,983 customers enrolled in AMP (as of 12/31/23). Residential credit collections efforts resumed in Q3 2023.

Main ESA Program

- SoCalGas has maintained constant communication and feedback loop with Contractors and has made the following changes in support:
 - Committed Program Year 2023 funding to allow main ESA Program Contractors to continue invoicing for work completed between 1/1/24 – 3/29/24 using available 2023 funding.
 - Increased fees on various ESA measures and enrollment.
 - Added Tankless Water Heater and Smart Fan Controller to measure offerings for greater program/customer savings.
 - Added temporary Fuel Surcharge to support ongoing higher gas prices; recently extended through Q1 2024.
 - Added Washer Installation Fee to support increased costs and incentivize appliance installation.
 - Implemented Quarterly Performance Based Incentives (PBI) for PY 2023 to reward high performers with additional compensation for hitting therm goals.
 - PBI will continue in 2024.
 - Reallocated budget to higher performing contractors throughout the year.



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

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 1st of every month. Any date changes are noted at the bottom of the schedule.

Energy Savings Assistance Program Solicitations Schedule ALL DATES ARE SUBJECT TO CHANGE*		2024						
		Q1		Q2		Q3		
		Feb	Mar	April	May	June	July	Aug
SCE	NEW: ESA Single Family Core Program - Outreach and Marketing	RFP Release (2/9); Bidders Conference (2/15); Proposals Due (3/21)		Bid Evaluation and Scoring (TBD); Contract Negotiations (TBD)	Contract Awards (TBD)			
SoCalGas	Main ESA (Basic/Plus) Program (delivery of core single-family in-home services)							
	Customer Experience Technology Platform and Customer Online Audit							System Launch (9/30/24)
PG&E	Main ESA (Basic/Plus) Program							
	Multifamily Whole Building Program							
	Statewide Multifamily Central Portal							
	Bulk Materials							
	ESA Pilot Plus/Pilot Deep							
	Evaluation for ESA Pilot Plus/Pilot Deep ¹		RFP release	Bidder Review of RFP, submit RFP Q/A and Proposal Prep	RFP Proposals Due / PG&E Bid Evaluation	Contract Negotiations	Contract Awards/ Issuance ^{2M}	
SDG&E	Main ESA (Basic/Plus) Program							
	Main ESA (Basic/Plus) Program HVAC and Water Heater Repair and Replacement ^{3M}							
	ESA Plus/Deep Pilot							
	ESA Plus/Deep Pilot 2.0	Pilot Ramp Up	Open to Participation					

Last revised March 8, 2024

ESA Update On Contractor Funding

January – December 2023

Utility	Funding Issue	Impact
PG&E	No issues to report. PG&E spent 94% of the ESA Main authorized budget through December 2023 and spent 100% of the measure-level budget.	None
SCE	No issues to report. SCE spent approximately 47% of its total budget in 2023.	SCE is committing all possible unspent funds from PY 2023 to PY 2024.
SDG&E	No contractor funding issues.	None
SoCalGas	<ul style="list-style-type: none"> The program's washer installer (ARCA) liquidated their company after months of ownership issues and will be unable to fulfill their PY 2023 contract. 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. 	<ul style="list-style-type: none"> SoCalGas amended a current Contractor's contract to include washer installation work with additional funding. High production prime Contractors were reallocated returned funding from low production Contractors. Additional funding was allocated with increased therm saving goals.





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.

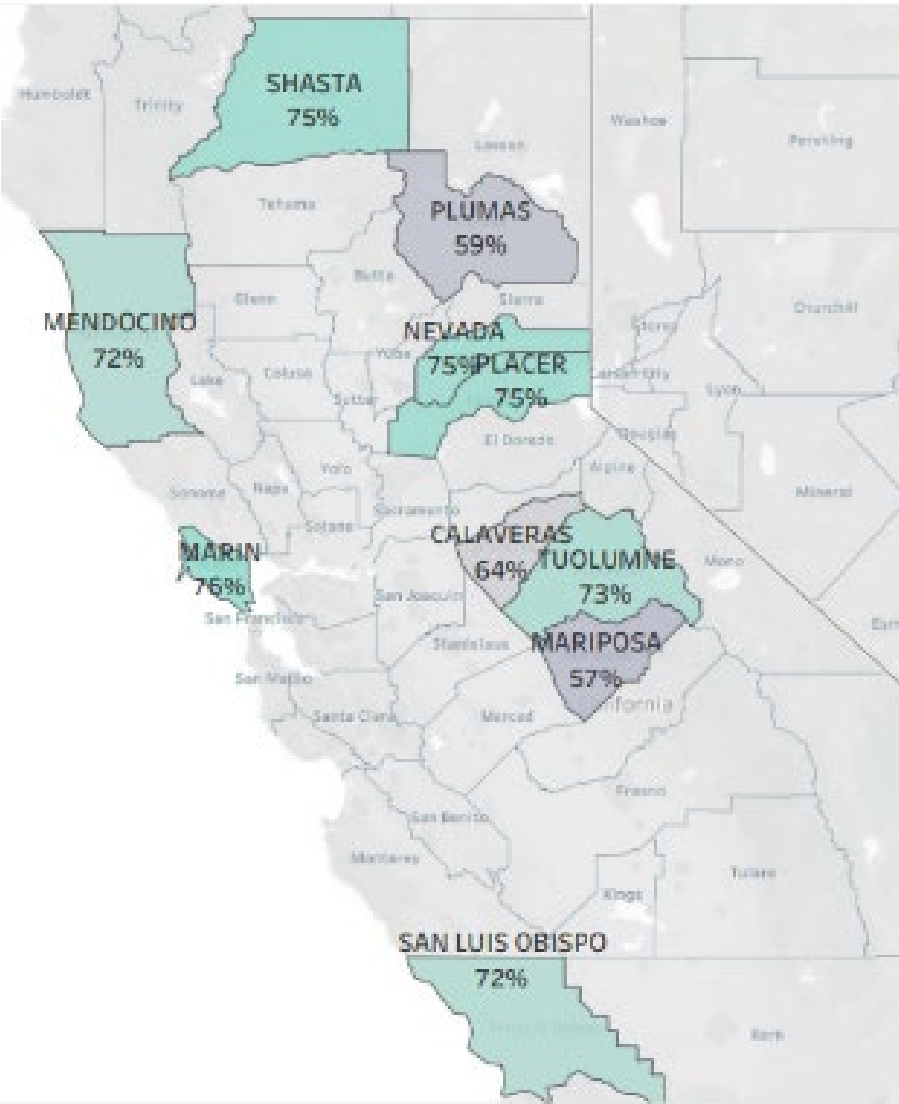
January – December 2023 CARE Program Updates*

Authorized 2023 Program Budgets and Expenditures				
Utility	2023 Budget	Expenditures	%	Rate Discounts
PG&E	\$13,961,600	\$9,534,834	68%	\$997,985,995
SCE	\$9,128,227	\$7,062,901	77%	\$710,611,683
SDG&E	\$6,922,453	\$6,146,088	89%	\$254,054,642
SoCalGas	\$10,181,364	\$9,062,389	89%	\$266,305,157
Total	\$40,193,644	\$31,806,212		\$2,228,957,477

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%	1,402,942	100%	274,291
SCE	4,597,417	1,315,495	29%	1,289,493	98%	347,275
SDG&E	1,340,734	301,966	23%	338,722	112%	72,873
SoCalGas	5,759,644	1,675,824	29%	1,836,582	110%	342,753
Total	17,178,263	4,695,447		4,867,739		1,037,192

- Authorized budgets pursuant to Decision (D.)21-06-015. January – December 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed on January 22, 2023
- ** Total households enrolled includes sub-metered households.

CARE Program PG&E Enrollment Map



PG&E Counties With Lowest Enrollment Rates	
County	Enrollment Rate*
MARIPOSA	57%
PLUMAS	59%
CALAVERAS	64%
SAN LUIS OBISPO	72%
MENDOCINO	72%
TUOLUMNE	73%
NEVADA	75%
PLACER	75%
SHASTA	75%
MARIN	76%

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

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

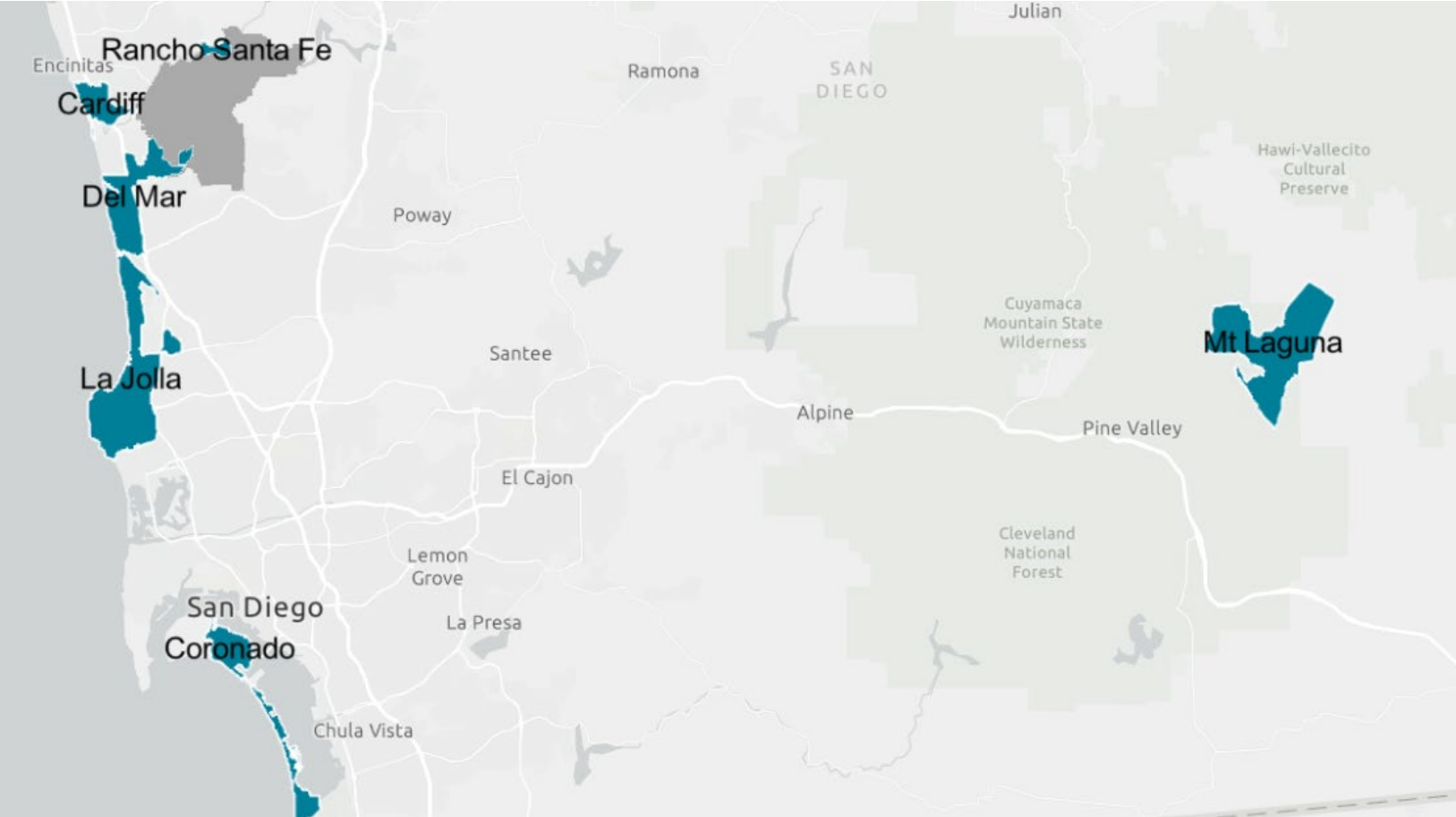
CARE Program *SCE Enrollment map*



County	Enrollment Rate*
San Bernardino	111%
Kings	110%
Riverside	105%
Tulare	103%
Los Angeles	99%
Orange	85%
Ventura	84%
Kern	80%
Inyo	65%
Santa Barbara	57%
Mono	39%

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

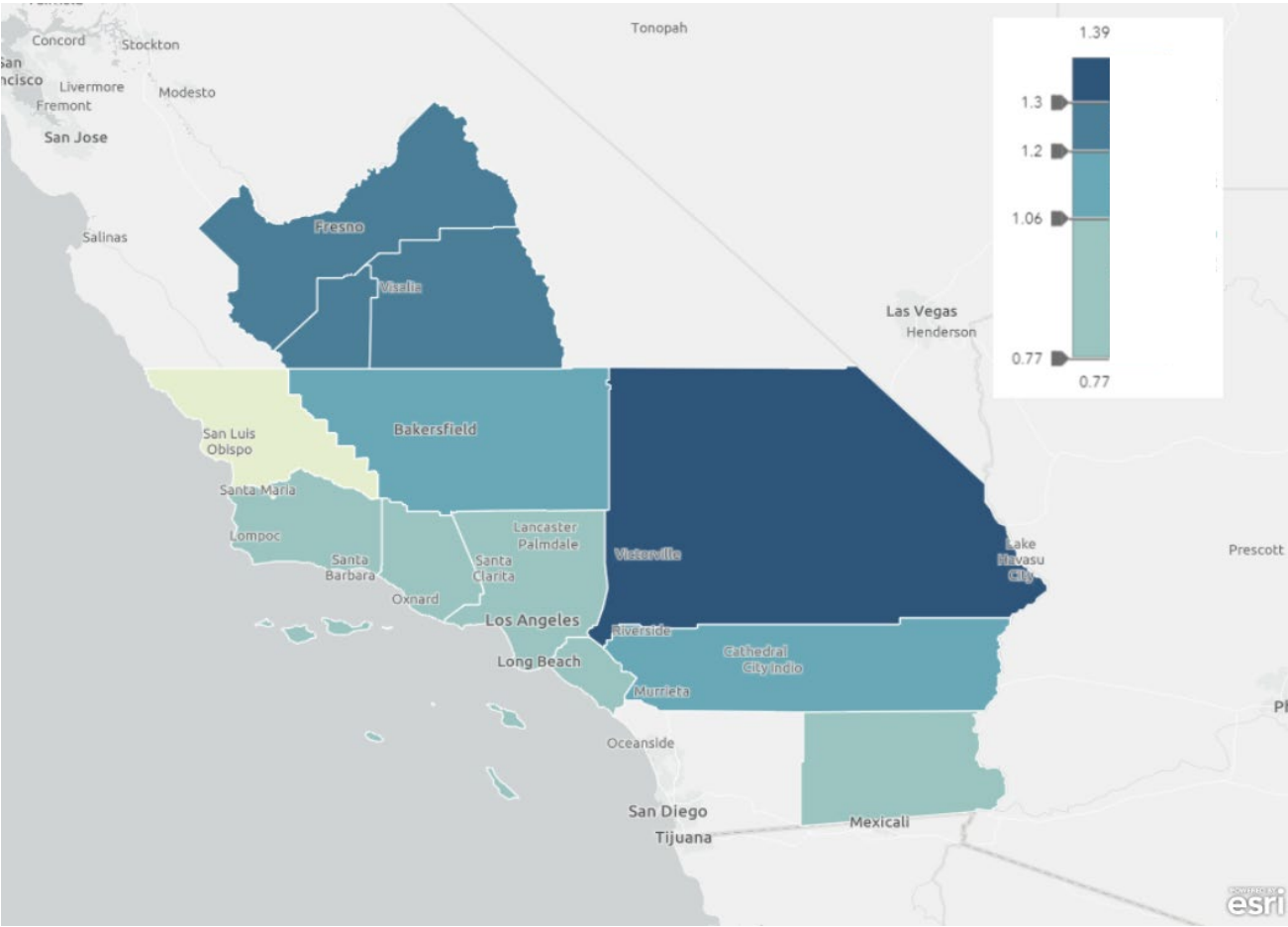
CARE Program *SDG&E Enrollment Map*



Zip codes with lowest enrollment rates	
City	Enrollment Rate*
Rancho Santa Fe	18%
Mount Laguna	20%
Coronado	32%
La Jolla	38%
Del Mar	39%
Cardiff	51%

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

CARE Program *SoCalGas Enrollment map*



County	Enrollment Rate *
San Bernardino	137%
Kings	129%
Tulare	129%
Fresno	122%
Kern	120%
Riverside	116%
Los Angeles	105%
Ventura	104%
Orange	102%
Santa Barbara	101%
Imperial	97%
San Luis Obispo	77%

*Represents the enrollment rates for all SoCalGas counties Jan-Dec 2023, as reported in the IOU ESA-CARE Monthly Report (Filed Jan. 22, 2024).

FERA Program Budgets and Enrollment

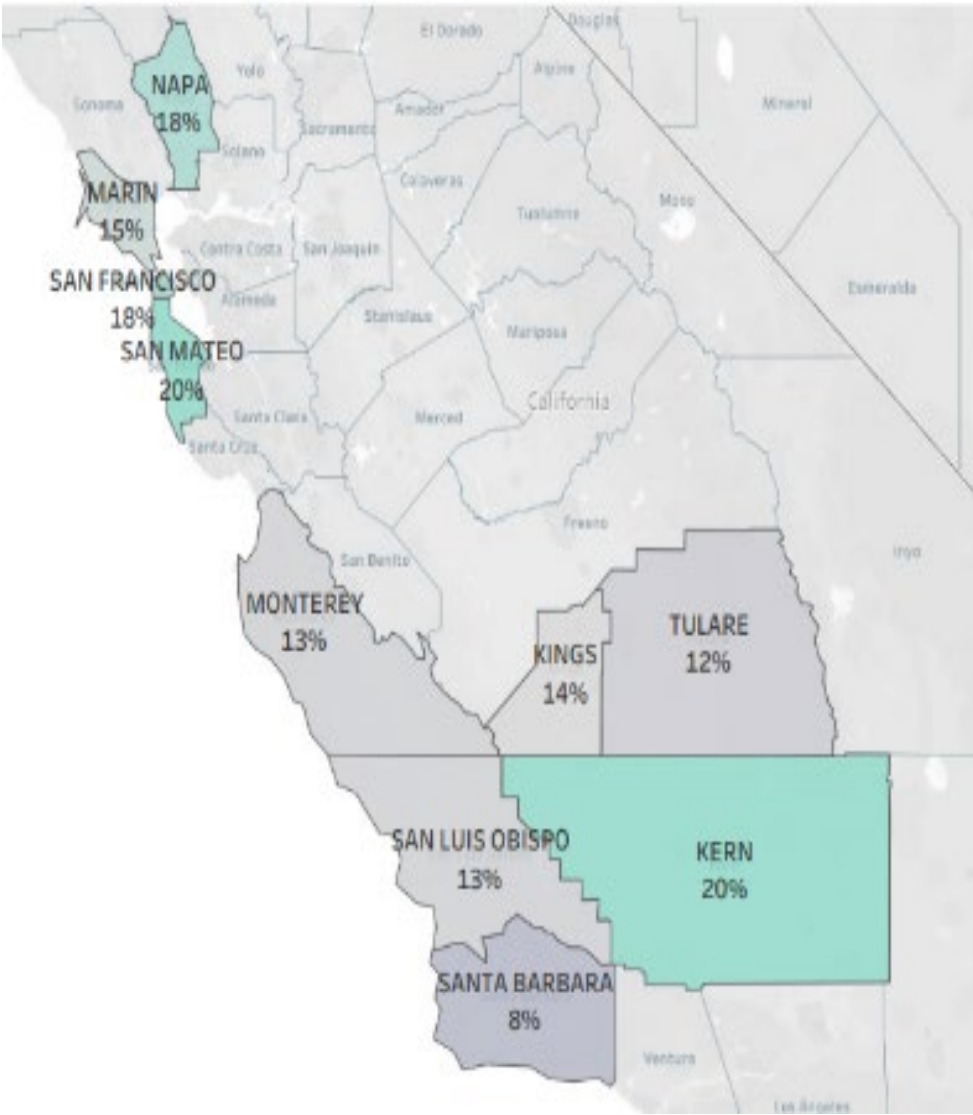
January – December 2023 FERA Program

Authorized 2023 Program Budgets Expenditures				
Utility	2023 Budget	Expenditures	%	Rate Discounts
PG&E	\$2,846,400	\$2,658,829	94%	\$17,148,000
SCE	\$1,398,444	\$476,319	34%	\$12,084,994
SDG&E	\$612,393	\$536,557	88%	\$4,670,344
Total	\$4,857,237	\$3,698,705		\$33,903,338

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%	38,295	23%	14,308
SCE	4,597,417	223,982	5%	30,397	14%	10,625
SDG&E	1,340,734	42,980	3%	10,467	24%	3,060
Total	10,569,623	430,451		79,159		27,993

*Authorized budgets pursuant to D.21-06-015. January – December 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed January 21, 2024.

FERA Program *PG&E Enrollment Map*



PG&E Counties With Lowest Enrollment Rates	
County	Enrollment Rate*
SANTA BARBARA	8%
TULARE	12%
SAN LUIS OBISPO	13%
MONTEREY	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 December 31, 2023.

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

FERA Program *SCE Enrollment map*



County	Enrollment Rate*
Riverside	17%
Orange	15%
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 December 31, 2023, and excludes counties with less than 1,000 estimated eligible households

FERA Program *SDG&E Enrollment Map*



Zip codes with lowest enrollment	
City	Enrollment Rate*
Coronado	11%
San Clemente	13%
Fallbrook	17%
San Ysidro	19%
Oceanside	21%
Escondido	22%
San Diego	24%
Vista	26%

*Represents SDG&E city zip codes with the lowest enrollment rates as of December 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 – December 2023*

Utility	Authorized Budget ¹	YTD Expenditures ²	%
PG&E	\$229,548,254	\$132,503,894	58%
SCE	\$75,286,696	\$28,130,259	37%
SDG&E ³	\$30,167,268	\$17,007,221	56%
SoCalGas	\$94,836,846	\$67,662,632	71%
Total	\$429,839,064	\$245,304,006	57%

* January – December 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed January 22, 2024.

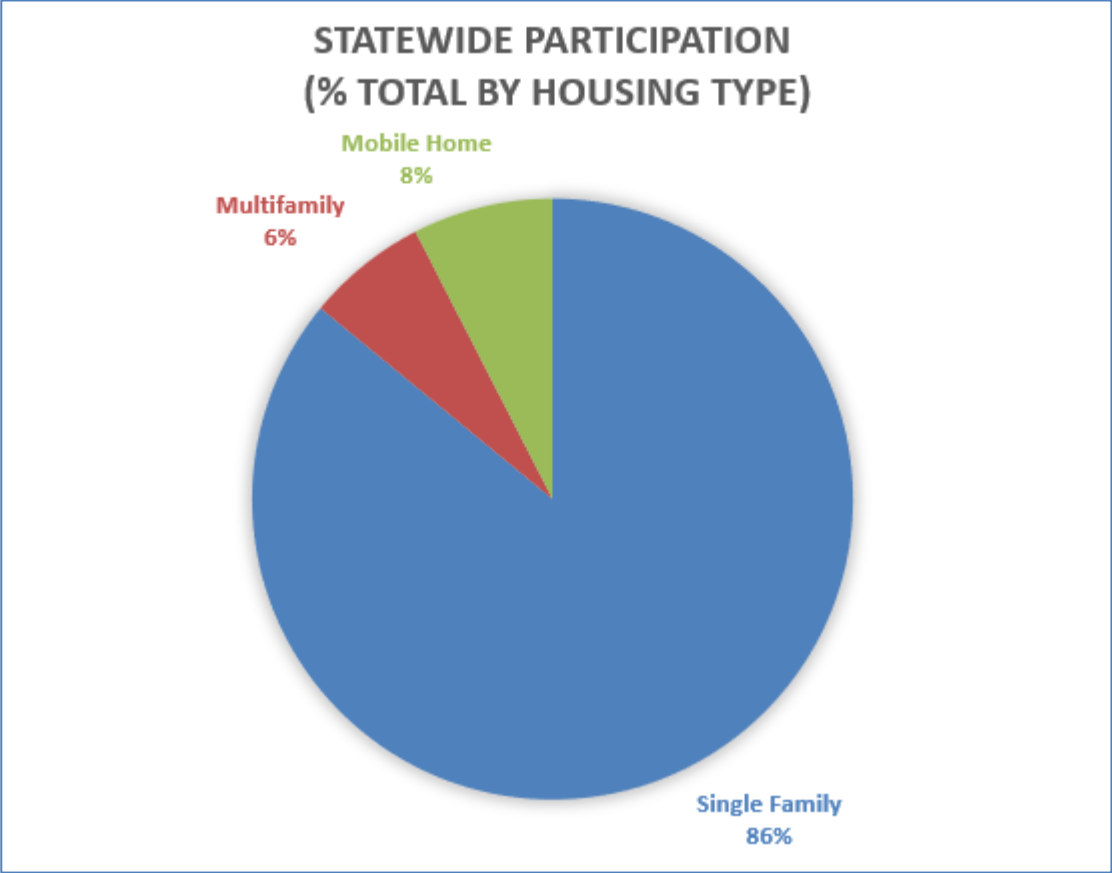
¹ Authorized budgets are the sum as shown in each IOU’s ESA-CARE-FERA Monthly Report, ESA Table 1, Table 1A and/or Table 2B.

² 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.

³ Includes Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Unspent Funds, Per SDG&E AL 4285-E.



Energy Savings Assistance Program – Program Participation Update



2023 Households Treated January – December 2023

2023 Households Treated ¹				
Utility	Est. HH Treated Target	Total	Total as % of 2023 Treated	Total as % of Eligible ESA HH ²
PG&E	60,437	65,519	108%	3.47%
SCE	37,871	13,192	35%	0.78%
SDG&E	11,711	4,082	35%	1.35%
SoCalGas	69,837	48,752	70%	2.43%
Total	179,856	131,545		

¹ January – December 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed January 22, 2024.

² 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 – December 2023

2023 Annual Savings for YTD Treatment ¹			Estimated Annual HH Usage for HH Treated YTD ²		Savings as % of Average HH Usage		Annual Program Savings Goal ³	
Utility	ESA kWh	ESA Therms	kWh	therms	kWh	therms	kWh	therms
PG&E	28,571,018	1,276,656	396,258,912	22,171,630	7%	6%	35,773,079	1,458,655
SCE ⁴	7,237,703	N/A	83,909,151	N/A	9%	N/A	22,416,302	244,348
SDG&E	860,882	24,162	17,438,304	911,102	5%	3%	2,593,606	108,790
SoCalGas	N/A	976,176	N/A	15,415,382	N/A	6.3%	N/A	1,435,220
TOTAL	36,669,603	2,276,994	497,606,367	38,498,114			60,782,987	3,247,013

¹ January – December 2023 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed January 22, 2024.

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

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

⁴ Values include ESA Core, MFCAM, PP/PD, and Building Electrification



Energy Savings Assistance Program Multifamily Update

January – December 2023 MULTIFAMILY UPDATES

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

- **PG&E:** Through 2023, PG&E's SPOC referred 399 multifamily customers to 60 programs including, but not limited to, SMUD, CSD LIWP, 3CE, BUILD, TECH, BayREN and local water district programs; and 60 referrals were 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 152 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 402 MF properties to the new ESA MFWB program and continues to leverage programs including but not limited to SOMAH. SPOC continues to outreach to local and nonprofit 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. Through 2023, PG&E completed 3,468 MF in-unit projects, and reported savings of 499,498 kWh, 60 kW, and 36,303 therms. The program also enrolled 140 and audited 47 whole building projects in 2023. The program currently has 506 whole building projects in the pipeline and PG&E is conducting eligibility screenings on 188 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 December 2023, the Southern MFWB Program enrolled 69 whole building projects (SDG&E 12, SCE 1, SoCalGas 21, SCE and SoCalGas 35), completed 38 property assessments and began installing basic measures for in-units. Additionally, the southern IOUs collaborated with its implementer, RHA to establish a strong pipeline of 745 property leads
- **SoCalGas:** As of December 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 December 2023	Successes/Challenges
<p>PG&E continued its efforts in implementing the 2023 Tribal Outreach Grant program.</p> <ul style="list-style-type: none">In 2023, The three Tribal grantees provided PG&E with a list of 51 tribal members that the ESA contractors could start making home visits with and installing measures for tribal members. <p>In addition to the Tribal Outreach Grant efforts, PG&E’s general ESA tribal outreach efforts included:</p> <ul style="list-style-type: none">In October 2023, 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.In November 2023, PG&E received two requests from tribes for meetings and presentations. Accordingly, PG&E met with the Paskenta Rancheria and Washoe Tribe and provided information on ESA, CARE, FERA, Medical Baseline, and other assistance programs. PG&E also provided support to two tribal members to assist them in enrolling in PG&E programs. Furthermore, PG&E provided information to one Tribe on how to become a PG&E pledging agency.In December 2023, the Bear River Rancheria requested materials for a meeting that they planned to host in the future. <p>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 on a variety of topics related to energy use, resiliency, safety, and community initiatives.</p>	<ul style="list-style-type: none">Challenges: PG&E Tribal Grantees focused on onboarding and capacity development to execute the grants.Successes:<ul style="list-style-type: none">The three 2023 Outreach Grant participants have started outreach efforts to their members. Because of these efforts, 51 tribe members were referred to the ESA program’s implementers.Through 2023, 62 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	8
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 December 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	226	12%	278	81%	456.13	456.13	0	19.17	19.82	\$ 1,352

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
 - Continue outreach endeavors and extend support to non-federally recognized tribal communities.
- Q4 Outreach:
 - SCE maintains ongoing communication with tribal leaders to explore opportunities for their communities. We 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:
 - 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.
 - Throughout 2023, the tribal task force team actively engaged in 21 events
- 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 December 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)	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	115	1.30%	30	383%	405	405	0.070	(3.36)	(0.40)	\$ 794

SDG&E Tribal Community Outreach Update

OUTREACH ACTIVITIES (in accordance with D.21-06-015)	SUCSESSES & CHALLENGES
<ul style="list-style-type: none"> Tribal Relations Manager has contacted all Tribes SDG&E serves to conduct listening sessions. <ul style="list-style-type: none"> In 2023, has met with all 17 tribal nations. Seven tribes were awarded mini-grants. Three tribes have completed their financial documents. Two received payment and the third will be issued by end of Q1 2024. Two additional tribes have expressed interest in grants and are working on gathering financial documents. Hosted two Community Resource Fairs in 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. Continued partnerships with two Tribal CBOs: <ul style="list-style-type: none"> Southern California Tribal Chairmen's Association (SCTCA) <ul style="list-style-type: none"> Total Outreach Activities YTD: 16 Total Reach: 16,800 Southern California American Indian Resource Center (SCAIR) <ul style="list-style-type: none"> Total Outreach Activities YTD: 68 Total Reach: 78,000 	<ul style="list-style-type: none"> Success: SDG&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 serving reservations such health and emergency services. Success: Through ongoing CBO partnerships, SDG&E staff has been invited to participate in SCAIR and SCTCA outreach events to promote CARE, FERA, and ESA. Success: Partnership with Southern Indian Health Council and Indian Health Council has increased SDG&E presence at smaller family events such as SDG&E's participation in the Healthy Families series hosted by various remote tribal nations. Challenge: Engaging non-federally recognized tribes. Challenge: Tribes are overwhelmed with requests and have limited resources, so it's important to meet them where they are at. Challenge: Mini-grants require Tribes to complete tax paperwork before payment can be issued. SDG&E has established streamlined process.

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*

San Diego Gas & Electric											
December 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	2	0%	181	1%	57	57	0	-	-	395

SoCalGas Tribal Community Outreach Update

Outreach Activities	Successes & Challenges
<p>Activities are in accordance with D.21-06-015</p> <ul style="list-style-type: none"> • SoCalGas continues communication with Tribes within SoCalGas' service territory <ul style="list-style-type: none"> • 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. • SoCalGas is continuing to build relationships with Tribes and establishing and/or maintaining a Tribal contact for each Tribe in its service territory. • SoCalGas is enhancing its outreach strategy to help navigate and increase engagement within Tribal communities <ul style="list-style-type: none"> • Through December 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. 	<ul style="list-style-type: none"> • Success: Through December 31, SoCalGas participated in 178 events in Tribal Communities. • Success: Presented to Tribal Alliance of Sovereign Indian Nations (TASIN), an intergovernmental association compiled of 13 federally recognized tribal governments throughout Southern California. • Working with Success: 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, Earth Days, and Spring Fiestas. • Challenge: Identifying non-federally recognized Tribes.

SoCalGas Tribal Community Landscape

- SoCalGas has 19 federally-recognized Tribes in its service territory.
 - Of the 19 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.

Agua Caliente Band of Cahuilla Indians	San Manuel Band of Serrano Mission Indians of the San Manuel Reservation
Augustine Band of Cahuilla Indians	Santa Rosa Band of Cahuilla Indians
Cabazon Band of Mission Indians	Santa Ynez Band of Chumash Mission Indians of the Santa Ynez Reservation
Cahuilla Band of Mission Indians of the Cahuilla Reservation	Soboba Band of Luiseño Indians
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
Morongo Band of Cahuilla Mission Indians	Tule River Indian Tribe of the Tule River Reservation
Pechanga Band of Luiseño Mission Indians of the Pechanga Reservation	Twenty-Nine Palms Band of Mission Indians of California
Ramona Band of Cahuilla Indians	

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

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

Fernandeno Tataviam Band of Mission Indians	Gabrieleno (Tongva) Band of Mission Indians
Juaneno Band of Mission Indians	

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
December 2023

ESA Main (SF, MH, MF in-unit)											
Customer Segments	# of Households Eligible* [1]	# of Households Treated [17]	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Household (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Household (Energy Saving Measures Only)	Avg. Peak Demand Energy Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Household (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Household (Energy Saving Measures Only)	Avg. Cost Per Treated Household
Location											
Tribal [8]	35	12	34%	206	5.8%				8.2	13.2	\$ 1,039

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



PSPS Impacts Year-Over-Year

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

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

Data is rounded and approximate

Some of the measures included in this presentation are contemplated as additional precautionary measures intended to further reduce the risk of wildfires.

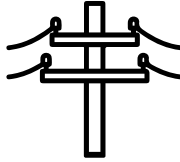
2023 Public Safety Power Shutoff (PSPS) Overview

In 2023, PG&E enacted PSPS events on August 30-31 and September 20 due to weather conditions that could have potentially caused a wildfire.



**Customers
Impacted**

~5,000



**Miles of Powerlines
Patrolled***

~700



**Community
Resource Centers**

12 open with over
1,371 customer visits

* Approximate data as of September 2023.




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

Generator and Battery Rebate Program

EXPANDED ACCESS

Rebates for eligible customers to purchase a qualified generator or battery

 pge.com/backupper

Self-Generation Incentive Program

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

 pge.com/sgip

Disability Disaster Access and Resources

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

 pge.com/ddar

Fixed Power Solutions

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

 pge.com/residentialstorageinitiative



2023 SCE PSPS OVERVIEW

Jan – Dec 2023

Statistics	Activations	Customer Interruptions	Circuit Interruptions	Customer Minutes of Interruption
Jan – Dec 2023	8*	26,316	51	~22M

*Includes PSPS and High Threat events. High Threat are events where SCE does not de-energize any customers.

MITIGATING IMPACTS OF PSPS -SCE

Customer Care Programs Update as of December

2023 COMMUNITY CARE RESOURCES

67 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 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 4,149 batteries and distributed 14,357 free portable backup batteries since program inception.
- Implemented the In-Event Battery Loan Pilot in June 2023 and assisted 35 eligible AFN customers during PSPS events with a battery loan.
- Granted 2,529 Portable Power Station Rebates and 585 Portable Generator Rebates.

SDG&E PSPS Support Services



Community Resource Centers

- 11 facilities in the HFTD
- Provides a local center for impacted customers to receive support and resiliency items, with a focus on AFN



Tribal Partnerships

- Partnerships with Southern Indian Health Council (SIHC) and Indian Health Council (IHC)
- Provides resiliency items and resources



Centralized Resource Hub

- Partnerships with 211 San Diego/OC United Way
- Connects customers to resources and direct support from 1,000+ orgs, 24/7/365, over 200 languages



Pantry & Warm Food

- Partnership with SD Food Bank & Feeding SD to provide mobile food pantries at rural, tribal and PSPS sites
- Warm Food vendors to provide additional options, as needed



Transportation

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



Hotel Stays

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



Wellness Checks

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



Community Engagement

- ~50 CBOs within SDG&E's Energy Solutions Partner Network
- Amplified PSPS notifications to expand reach in HFTD



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 ^[1]	\$32.51
Unspent & uncommitted funds used to offset 2023 budget revenue requirement	- \$0
2023 Revenues Collected (Jan - Dec)	+ \$172.23
2023 Expenses (Jan - Dec)	- \$132.50
2023 Accrued Interest (Jan - Dec)	+ \$2.90
2023 Budget Transfer from SASH/MASH ^[2]	<u>+ \$9.57</u>
Total remaining unspent funds as of December 31, 2023 ^[3]	\$84.70

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.
3. \$52.2M in unspent fund is carried forward to 2024 according to fund shifting rules for MFWB, SPOC, Pilots, Studies, and Pilot Plus and Pilot Deep activities. Remaining \$32.5M is being used to off-set future collection according to fund shifting rules.

SCE's Unspent Funds for ESA Program

Total Remaining Unspent Funds (\$M)		
Unspent Funds through 12/31/22 [1]	\$	25.48
2023 Revenue Collected (Jan – Dec)	\$	61.13
2023 Expenses from (Jan –Dec)	\$	(32.38)
2023 Accrued Interest (Jan- Dec)	\$	2.47
Budget Transfer from SASH/MASH [2]	\$	6.16
Total Unspent Funds through 12/31/2023	\$	62.86

1. This is the remaining Unspent Funds amount from 2009-2022 program cycles through December 31, 2023.
2. \$6.16M transfer of unspent MASH and SASH program funds from California Solar Initiative Program Balancing Account (CSIPBA) per AL 5106-E, approved 10/20/23.

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
Revenues collected through YTD December 2023	\$ 22.98
Expenses incurred through YTD December 2023 [3]	\$ (17.56)
Budget Transfer from SASH/MASH [4]	\$.31
Total remaining unspent funds as of December 31, 2023	\$ 26.39
Remaining ESA Main committed funds as of December 31, 2023 [5]	\$ (3.00)
Remaining ESA MFWB committed funds as of December 31, 2023	\$ (4.78)
Pre-2023 unspent & uncommitted funds to offset 2024 PPP rates [6]	\$ (15.00)
Total remaining unspent & uncommitted funds as of December 31, 2023 [7]	<u>\$ 3.61</u>

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

4. SDG&E filed Advice Letter 4285-E for disposal of unspent funds from the SASH and MASH programs to the ESA Program on October 31, 2023. The AL was approved on November 30, 2023.

5. ESA Main committed funds total is subject to change. The final numbers will be reflected in the 2023 Annual Report.

6. 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.

7. 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
Total Remaining Unspent Funds through PY 2020 [1]	\$222.22
2021 – 2022 Revenues Collected	\$9.12
2021 – 2022 Total Expenses [2]	\$220.03
Total Remaining Unspent Funds through PY 2022 [1]	\$11.31
2023 Revenues Collected	\$74.97
2023 Total Expenses [3]	\$72.21
Total Remaining Unspent Funds as of 12/31/2023 [1]	\$14.07
<u>Footnotes</u>	
[1] Unspent Funds related to Revenues Collected	
[2] Total Expenses from Annual Reports	
[3] Total Expenses from December 2023's Monthly Report - Summary Table	
Notes:	
- Unspent funds can only be used for ESA Program activities or returned to ratepayers.	



State of Disconnections and Arrearage Management Plans (AMP)

PG&E Disconnections Status and AMP – Through December 2023

Arrearage Management Plan (AMP) ^[1]

- Number of customers enrolled since launch : 389k
 - Gross percentage of eligible households enrolled: 85%
 - Number successfully completed 12-month enrollment since program launched in Feb. 2021: 51k
 - Percentage of total enrollments since launch that have successfully completed AMP: 13%^[2]
- 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 : \$226M

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 December 2023 Monthly Disconnect Data Report.^[3]

Throughout 2023, PG&E implemented additional collection touchpoints:

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

In addition, PG&E contributed **\$55M** to the REACH program to help reduce customer arrearages and disconnections in 2024.

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 86% of its total eligible population.

^[1] Data as of 12/31/23

^[2] Number updated to remove customers who received CAPP funding that covered the remaining AMP balance

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

SCE Disconnections Status and AMP – Through December 2023

Arrearage Management Plan (AMP)

- Number of customers enrolled: 155,374
 - Percentage of eligible households enrolled: 19%
 - Number successfully completed 12-month program launched since Feb. 2021: 9,725
 - 6% 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: \$246M
- Total amount forgiven: \$71M

Disconnections/Reconnections

Residential disconnections 2023 ¹ :	29,943
Residential Customers reconnected:	28,439

¹January to December 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)* – 844 calls completed



AMP Delayed Billing outreach

- 2023 (YTD)* - 3,096 letters mailed



SDG&E Disconnections Status and AMP – Through December 2023

Arrearage Management Plan (AMP)*

- Number of customers enrolled: 18,472
- Percentage of eligible households enrolled: 40%
- Number of customers successfully completed 12-month program since Feb. 2021 launch: 7,692
 - 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: \$36.7M
- Total amount forgiven: \$26M

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
- Bill inserts & bill package
- Continued program education through SDG&E's Energy Solutions Partner Network, comprised of 200+ CBOs.

Disconnections

Number of disconnections: 1,554

Resumption of residential credit collection efforts started in Q3 2023.

Neighbor-to-Neighbor*

Number of customers receiving N2N funds: 8,728

Total Amount Spent: \$4.8M

*SDG&E shareholder funded utility assistance program

SoCalGas Disconnections Status and AMP – Through December 2023



Arrearage Management Plan (AMP)*

- Number of customers enrolled (2/1/21 – 12/31/23) : 264,983
 - Percentage of eligible households enrolled : 58.4%
- Total arrearages: \$200.8M Total amount forgiven: \$64.2M
- 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	6	36,779	80,019	0%	31.5%	68.5%
Enrollment Date 1-1-23 12-31-23	148,179	90,939	1,101	56,139	61.4%	.7%	37.9%
Total	264,983	90,945	37,880	136,158	34.3%	14.3%	51.4%

- Average length of participation for customers who did not complete the 12-month program
 - For those enrolled between 2/2/21 – 12/31/23, the average length of enrollment in the program was 5 months

*Data through 12/31/23, updated on 03/06/2024

Disconnections

Number of disconnections, Jan 2021 – December 31, 2023: 42
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*
SCE For additional DR program information, please visit: Demand Response Programs for Homes (sce.com)	463	218	294	285	39
SDG&E ^[1] For additional DR program information, please visit: Demand Response for Your Home (sdge.com)	4	5	30	8	29
PG&E For additional DR program information, please visit: Energy incentive programs (pge.com)	14	360	514	1,168 ^[2]	943 ^[3]

*January – December 2023

^[1] Based on current data. Actual opt-in may have occurred in subsequent year.

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

^[3] Based on best approximation of data as of November 2023, and is dependent on customer opt-in/opt-out and is subject to change.



Joint IOU Report on Public Purpose Program Surcharge Update

Low Income Oversight Board Meeting
WebEx

March 14, 2024

Customer Bill – Public Purpose Program Surcharge (2022-2024)

	What does the surcharge for public purpose programs cover (CARE, ESA, FERA, etc.)?	Where is this on their bill?	How much has the average bill gone up from January of 2022 to January of 2024?	How much of this was attributed to public purpose programs by category (CARE, ESA, etc.)?
SCE	<p>Low-Income:</p> <ul style="list-style-type: none"> CARE Subsidy, CARE and FERA Admin, ESAP, CARE Balancing Account <p>PPP Balancing Account + Uncollectibles:</p> <ul style="list-style-type: none"> PPPAM Balancing Account, CIA <p>ERRA Forecast (Fuel and Purchased Power (F&PP)/Clean Energy Programs)</p> <ul style="list-style-type: none"> F&PP for TMNBC, BMNBC, PPP <p>Other:</p> <ul style="list-style-type: none"> EPIC, SGIP, Summer Reliability OIR <p>Energy Efficiency(EE):</p> <ul style="list-style-type: none"> EE Procurement and Schools EE Stimulus Program 	The PPP surcharge appears in the “Details of your new charges” section of the customer’s bill.	<p>A typical non-CARE and CARE residential customer using 500 kWh per month saw an average monthly bill increase of \$39.19 or 28.2% and \$26.55 or 28.2%, respectively.</p> <p>The increase from January of 2022 to January of 2024 is primarily attributed to Wildfire, ERRA, and GRC related changes.</p>	This increase in Residential non-CARE and CARE bills from January of 2022 to January of 2024 attributable to PPP is \$0.90 and \$0.61, respectively.

Customer Bill – Public Purpose Program Surcharge (2022-2024)

	What does the surcharge for public purpose programs cover (CARE, ESA, FERA, etc.)?	Where is this on their bill?	How much has the average bill gone up from January 2022 to January of 2024?	How much of this was attributed to public purpose programs by category (CARE, ESA, etc.)?
PG&E - Electric	<p>Low-Income:</p> <ul style="list-style-type: none"> CARE Subsidy, CARE Admin, ESA, CARE Balancing Account <p>PPP Balancing Account + Uncollectibles:</p> <ul style="list-style-type: none"> PPPRAM Balancing Account, RUBA (non-Generation) <p>ERRA Forecast (Fuel and Purchased Power (F&PP)/Clean Energy Programs)</p> <ul style="list-style-type: none"> TMNBC, BioMAT, DAC-GT <p>Other:</p> <ul style="list-style-type: none"> EPIC, Emergency (Summer) Reliability OIR <p>Energy Efficiency(EE):</p> <ul style="list-style-type: none"> EE, EE Procurement, and Schools EE Stimulus Program 	Gas and Electric PPP charges are found in the “Details of Gas Charges” and “Your Electric Charges Breakdown” sections of the Gas and Electric bills (outlined in green on the sample bills).	<p>A residential <u>Non- CARE</u> customer with typical usage of 500 kWh per month experienced an electric bill increase from January 2022 to January 2024 of \$71 or 47%. This is primarily attributed to an increase in distribution and generation rates.</p> <p>A residential <u>CARE</u> customer with typical usage of 500 kWh per month experienced an electric bill increase from January 2022 to January 2024 of \$44 or 45%. This is primarily attributed to an increase in distribution and generation rates.</p>	<p>The increase in Residential <u>Non- CARE</u> customer’s electric bill from January 2022 to January 2024 attributable to PPP is \$3.50, or 5% of the total increase, largely due to an increase in CARE surcharge and uncollectibles.</p> <p>The increase in Residential <u>CARE</u> customer’s electric bill from January 2022 to January 2024 attributable to PPP is \$0.95, or 2% of the total increase, largely due to an increase in uncollectibles.</p>

Customer Bill – Public Purpose Program Surcharge (2022-2024)

	What does the surcharge for public purpose programs cover (CARE, ESA, FERA, etc.)?	Where is this on their bill?	How much has the average bill gone up from January 2022 to January of 2024?	How much of this was attributed to public purpose programs by category (CARE, ESA, etc.)?
PG&E - Gas	<p>Energy Efficiency(EE):</p> <ul style="list-style-type: none"> EE ,Schools EE Stimulus Program and EE Balancing Account <p>Energy Savings Assistance Program (ESA):</p> <ul style="list-style-type: none"> ESA programs and ESA Balancing Account <p>California Alternate Rates for Energy Administration (CARE):</p> <ul style="list-style-type: none"> CARE Discount, CARE A&G, and CARE Balancing Account <p>Research, Development, & Demonstration (RD&D):</p> <ul style="list-style-type: none"> RD&D statewide authorized funding and RD&D balancing account <p>Board of Equalization Administration Costs (BOE):</p> <ul style="list-style-type: none"> BOE admin cost 	Gas and Electric PPP charges are found in the “Details of Gas Charges” and “Your Electric Charges Breakdown” sections of the Gas and Electric bills (outlined in green on the sample bills).	<p>➤ A Residential <u>Non- CARE</u> customer with typical usage of 33 therms per month experienced a gas bill increase from January 2022 to January 2024 of \$6.98 or 11%. This increase is attributable primarily due to the increase in transportation and PPP rates and a lesser extent due to the procurement rate.</p> <p>➤ A Residential <u>CARE</u> customer with typical usage of 29 therms per month experienced a gas bill increase from January 2022 to January 2024 of \$3.81 or 9%. This increase is attributable primarily due to the increase in transportation and PPP rates and a lesser extent due to the procurement rate.</p>	<p>➤ This increase in Residential <u>Non-CARE</u> customer’s gas bill from January 2022 to January 2024 attributable to PPP is \$0.23 or 0.4%.</p> <p>➤ This increase in Residential <u>CARE</u> customer’s gas bill from January 2022 to January 2024 was off-set by a decrease attributable to PPP of \$-0.04 or -0.1% due to overcollections in The ESA balancing account being returned to CARE customers.</p>

Note: PG&E is using the illustrative Gas Procurement as filed in the G-PPPs surcharge, Transportation and PPPS rates from January 2022 and January 2024. SoCalGas is using a “typical” average bill to calculate how much an average bill has gone up between November 2021 to January 2022.

Customer Bill – Public Purpose Program Surcharge (2022-2024)



	What does the surcharge for public purpose programs cover (CARE, ESA, FERA, etc.)?	Where is this on their bill?	How much has the average bill gone up from January of 2022 to January of 2024?	How much of this was attributed to public purpose programs by category (CARE, ESA, etc.)?
Gas	CARE, ESA, EE. AB 841 (Schools Energy Efficiency), SD Port, RD&D	Gas and Electric PPP charges are found in the "Other Charges & Credits" sections of the customer's bill	<p>➤ A Residential <u>Non-CARE</u> customer with typical usage of 25 therms per month experienced a gas bill decrease from January 2022 to January 2024 of \$5.65 or 9.5%.</p> <p>➤ A Residential <u>CARE</u> customer with typical usage of 21 therms per month experienced a gas bill decrease from January 2022 to January 2024 of \$3.83 or 9.8%.</p>	<p>➤ This decrease in Residential <u>Non-CARE</u> customer's gas bill from January 2022 to January 2024 was due to the commodity. The PPP increased by \$0.14 or 6% due to increases in CARE and Energy Efficiency.</p> <p>➤ A Residential <u>CARE</u> customer's gas bill from January 2022 to January 2024 attributable to PPP is an increase of \$0.09 or 0.2% of total bill due to increase in Energy Efficiency.</p>

Customer Bill – Public Purpose Program Surcharge (2022-2024)

	What does the surcharge for public purpose programs cover (CARE, ESA, FERA, etc.)?	Where is this on their bill?	How much has the average bill gone up from January of 2022 to January of 2024?	How much of this was attributed to public purpose programs by category (CARE, ESA, etc.)?
Electric	<p>California Alternative Rates for Energy (CARE), Family Electric Rate Assistance (FERA), Energy Savings Assistance (ESA), Energy Efficiency (EE), Electric Program Investment Charge (EPIC), Self-Generation Incentive Program (SGIP), Food Bank Discount, San Diego Port, AB 841 (Schools Energy Efficiency), Flex Alert, Economic Development Rate (EDR), Wildfire and Natural Disaster Resiliency Rebuild (WNDRR)*, Tree Mortality Non-Bypassable (TMNB), Residential Uncollectible Balancing Account (RUBA), Percentage of Income Payment Plan (PIPP) Pilot, Green Tariffs (GT) Programs not covered by Greenhouse Gas (GHG) Revenues.</p> <p>* Currently zero revenue requirement</p>	Gas and Electric PPP charges are found in the "Other Charges & Credits" sections of the customer's bills	<p>➤ A Typical bundled inland/coastal Residential <u>Non-CARE</u> customer using 400 kWh experienced a bill decrease from January 2022 to January 2024 of -\$3/month or - 2.1% (excludes the semi-annual California Climate Credit (CCC)).</p> <p>➤ A Typical bundled inland/coastal Residential <u>CARE</u> customer using 400 kWh experienced a bill decrease from January 2022 to January 2024 of -\$2/month or - 2.3% (excludes CCC).</p>	<p>➤ The decrease in a Typical Residential <u>Non-CARE</u> customer from January 2022 to January 2024 attributed to PPP is -\$1 or - 27.2%, primarily related to decreases in TMNB and School Energy Efficiency Stimulus Program Balancing Account (SEESPBA) partially offset by increases in CARE program costs.</p> <p>➤ The decrease in a Typical Residential <u>CARE</u> customer from January 2022 to January 2024 attributed to PPP is -\$2 or - 103%, primarily related to decreases in TMNB and SEESPBA.</p>

Customer Bill – Public Purpose Program Surcharge (2022-2024)



	What does the surcharge for public purpose programs cover (CARE, ESA, FERA, etc.)?	Where is this on their bill?	How much has the average bill changed from January of 2022 to January of 2024?	How much of this was attributed to public purpose programs by category (CARE, ESA, etc.)?
SoCalGas	CARE, ESA, RD&D, EE	The PPP surcharge appears in the "Taxes & Fees on Gas Charges" section of the customer's bill.	<ul style="list-style-type: none">➤ A Residential <u>Non-CARE</u> customer with typical usage of 37 therms per month experienced a gas bill decrease from January 2022 to January 2024 of \$6.64 or 9.5%. This decrease is attributable primarily due to the commodity rate decrease which was offset by an increase in transportation and PPPS..➤ A Residential <u>CARE</u> customer with typical usage of 27 therms per month experienced a gas bill decrease from January 2022 to January 2024 of \$3.79 or 9.3%. This decrease is attributable primarily due to the commodity rate which was offset by an increase in transportation and PPPS.	<ul style="list-style-type: none">➤ This change in Residential <u>Non-CARE</u> customer's gas bill from January 2022 to January 2024 attributable to PPP is \$2.45 or 3.5% due to increases in the Energy Efficiency, Energy Savings Assistance Program and CARE program costs.➤ This increase in Residential <u>CARE</u> customer's gas bill from January 2022 to January 2024 attributable to PPP is \$1.54 or 3.8% due to an increase in the Energy Efficiency and the Energy Savings Assistance Program costs.

Note: SoCalGas is using the actual Gas Procurement, Transportation and PPPS rates from January 2022 and Jan 2024. SoCalGas is using a "typical" average bill to calculate how much an average bill has gone up between Jan 2022 to Jan 2024.

Break

Long-Term Gas Planning Rulemaking

R.20-01-007

Phase 3: Coordinating the Gas Transition

March 14, 2024

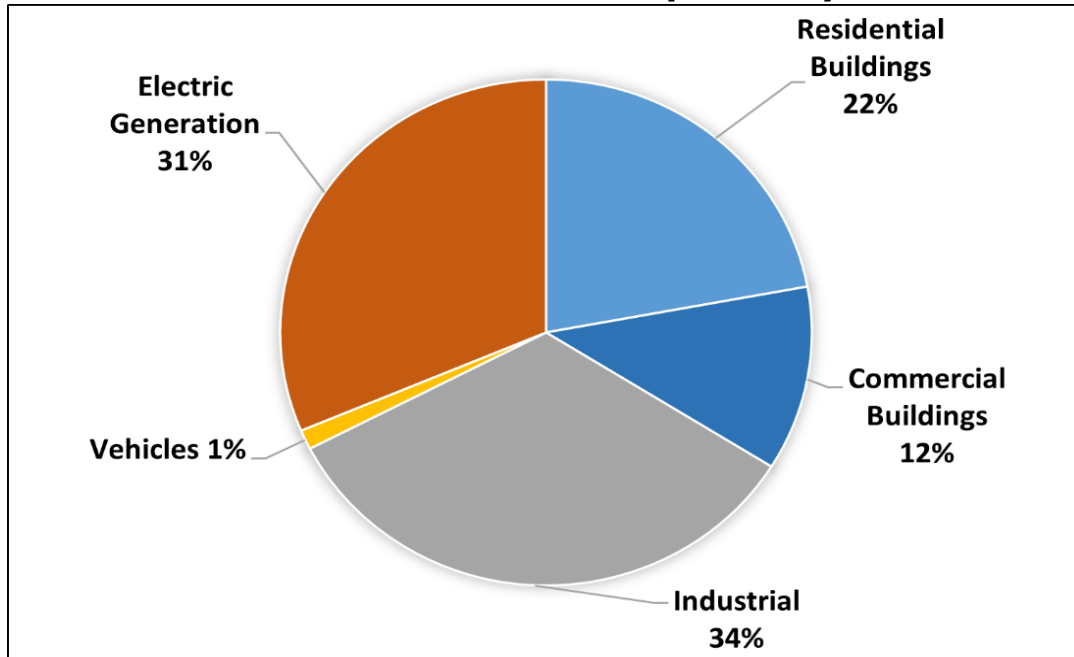


California Public
Utilities Commission

Where We Are

Fossil gas supplies California buildings, industry, and electric generation

California Gas Consumption by Sector

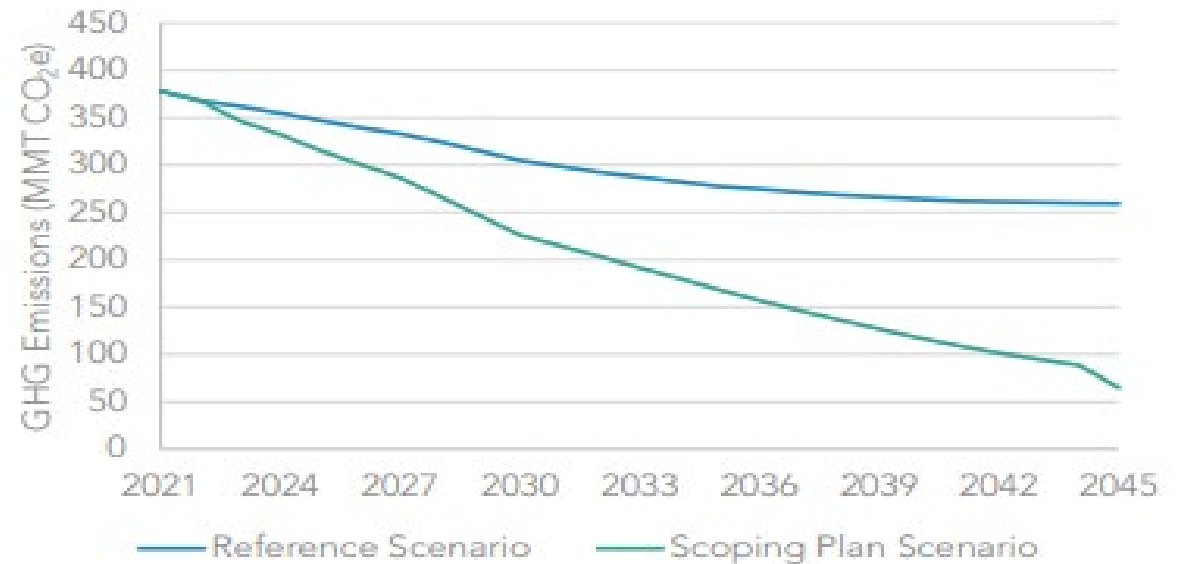


Source: CEC Staff

Where We're Going

"The need for a gas transition flows from implementation of California's statutory targets to reduce GHG emissions and fight climate change as reflected in CARB's Scoping Plan."
-CPUC Feb. 2022 Assigned Commissioner's Ruling

Figure 2-1: Reference and Scoping Plan Scenario GHG emissions¹³²



Source: CARB 2022 Scoping Plan

Latest Proceeding Update

February 22, 2024: CPUC issues an Assigned Commissioner's Ruling and attached Joint Agency White Paper outlining the need for a balanced gas transition.

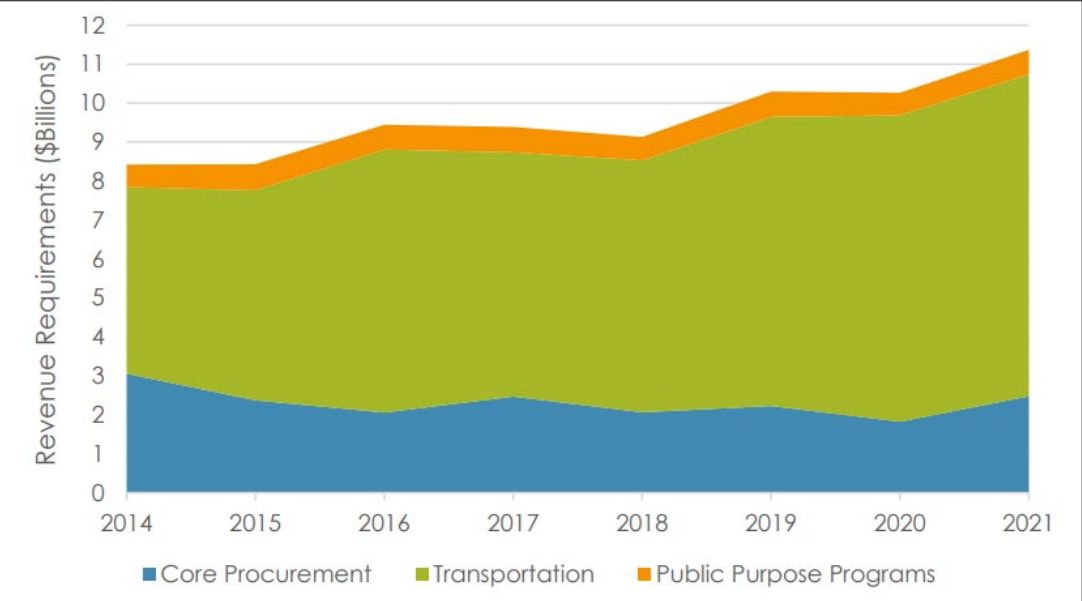
Why do we need a balanced gas transition?

- Transitioning away from fossil gas is necessary to achieve the State's climate goals.
- Fossil gas pollution has equity and public health impacts.
- The transition off fossil gas poses risks to affordability, safety, reliability, and the gas workforce.

-Joint Agency Staff White Paper

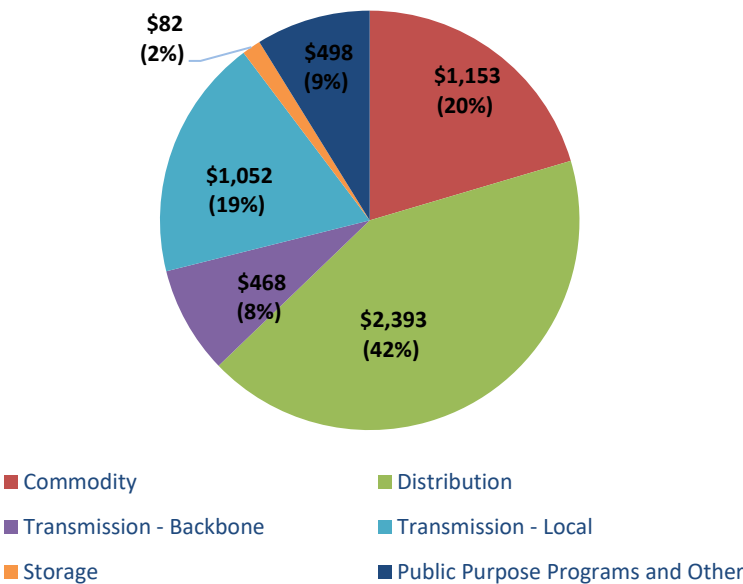
Rates: Infrastructure and Commodity Costs

Historical Trends in Gas Utility Revenue Requirement Components (\$ billions)



Source: CPUC

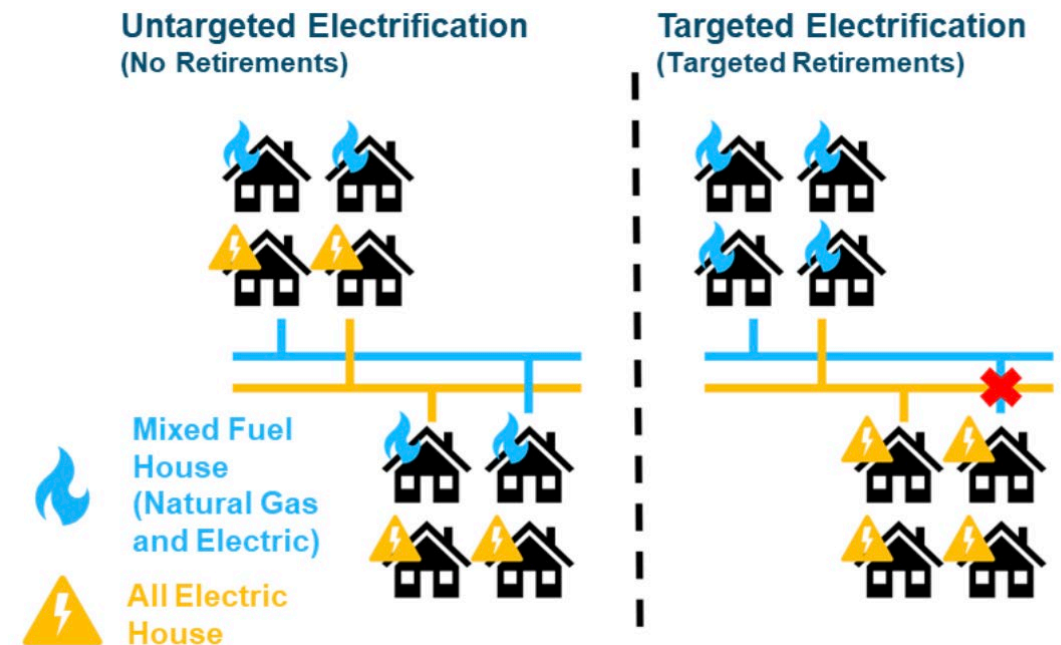
PG&E 2023 Revenue Requirement (\$ millions)



Source: CPUC

Potential Strategies to Help Mitigate Rate Risk

- **Targeted Electrification:** Concentrate electrification efforts geographically to avoid gas system investments.
- **Accelerated Depreciation:** Reduce the period over which gas infrastructure investment costs are recovered so they can be spread across more customers.
- **Non-Ratepayer Funding Sources:** Federal tax credits and incentives, securitization, etc.
- **End Line Extension Subsidies:** The CPUC ended subsidies for gas and mixed fuel line extensions to slow gas system expansion.



Source: E3

Guiding Principles for an Equitable Gas Transition

- Prioritize benefits and reduce impacts to low-income and disadvantaged communities;
- Low-income customers should not pay a disproportionate share of gas system costs;
- Expand coordination, involvement, and engagement with low-income and disadvantaged communities;
- Raise awareness of gas transition opportunities and risks among CBOs, tribal groups, local governments, low-income advocates and equity advisory groups;
- Develop and expand opportunities for the existing workforce. Create career pathways in new clean energy sectors.

Long-Term Gas Planning Rulemaking: Phase 3 Proposed Tracks

- **Track 1: Scenario analysis:** analysis of gas transition scenarios to achieve CARB Scoping Plan targets;
- **Track 2: Planning processes:** approaches, methodologies, and objectives for implementing the gas transition;
- **Track 3: Opportunities for interim action:** shorter-term steps to make decarbonization and decommissioning easier for customers and utilities; and
- **Track 4: Longer-term options:** medium- to longer-term actions to reduce gas system costs, while considering environmental and social justice goals.

Next Steps

CPUC Long-Term Gas Rulemaking

- March 13: Party comments on scope
- March 19: Prehearing Conference
- March 28: Party comments on white paper
- April: Scoping Memo
- TBD: Workshops
- Proposed Decisions on Phase 3 Issues: 2025-26

Concurrent Activities

- CPUC Building Decarbonization Rulemaking
- CEC Programs and Research

Questions?

For more info, see <https://www.cpuc.ca.gov/industries-and-topics/natural-gas/long-term-gas-planning-rulemaking>

CSD Updates

Board Member Jason Wimbley, CSD

Wrap Up & Closing Remarks



California Public Utilities Commission