



# 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	FERA	ESA Main		
Enrollment: 1,402,942 Enrollment Rate: 100% Discounts: \$997,985,995 % Adm. Expenditure: 68%	Enrollment: 38,295 Enrollment Rate: 23% Discounts: \$17,148,000 % Adm. Expenditure: 94%	<table border="0"> <tr> <td>                             Energy Savings:                             <ul style="list-style-type: none"> <li>• 6,603 kW</li> <li>• 204% YTD</li> <li>• 28,571,018 kWh</li> <li>• 80% YTD</li> <li>• 1,276,656 therms</li> <li>• 88% YTD</li> </ul> </td> <td>                             Homes treated: 65,519                             <ul style="list-style-type: none"> <li>• 108% YTD</li> </ul>                             % Expenditure: 94% YTD                         </td> </tr> </table>	Energy Savings: <ul style="list-style-type: none"> <li>• 6,603 kW</li> <li>• 204% YTD</li> <li>• 28,571,018 kWh</li> <li>• 80% YTD</li> <li>• 1,276,656 therms</li> <li>• 88% YTD</li> </ul>	Homes treated: 65,519 <ul style="list-style-type: none"> <li>• 108% YTD</li> </ul> % Expenditure: 94% YTD
Energy Savings: <ul style="list-style-type: none"> <li>• 6,603 kW</li> <li>• 204% YTD</li> <li>• 28,571,018 kWh</li> <li>• 80% YTD</li> <li>• 1,276,656 therms</li> <li>• 88% YTD</li> </ul>	Homes treated: 65,519 <ul style="list-style-type: none"> <li>• 108% YTD</li> </ul> % 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 \$28.5.M 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 <sup>1</sup>	MF CAM
<ul style="list-style-type: none"> <li>• Customers Enrolled: 338,772</li> <li>• Enrollment Rate: 112%</li> <li>• New enrollments: 72,873</li> <li>• % Admin Expenditures: 89%</li> </ul>	<ul style="list-style-type: none"> <li>• Customers Enrolled: 10,467</li> <li>• Enrollment Rate: 24%</li> <li>• Newly Enrolled: 3,060</li> <li>• % Admin Expenditures: 88%</li> </ul>	<ul style="list-style-type: none"> <li>• Homes Treated: 4,082                             <ul style="list-style-type: none"> <li>• 35% YTD</li> </ul> </li> <li>• kWh Saved: 656,889                             <ul style="list-style-type: none"> <li>• 33% YTD</li> </ul> </li> <li>• Therms Saved: 3,091                             <ul style="list-style-type: none"> <li>• 4% YTD</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• # of Properties: 17                             <ul style="list-style-type: none"> <li>• 121% YTD</li> </ul> </li> <li>• kWh Saved: 203,993                             <ul style="list-style-type: none"> <li>• 102% YTD</li> </ul> </li> <li>• Therms Saved: 21,071                             <ul style="list-style-type: none"> <li>• 585% YTD</li> </ul> </li> </ul>

## 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.

<sup>1</sup> 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](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.

Energy Savings Assistance Program Solicitations Schedule ALL DATES ARE SUBJECT TO CHANGE*		2024							
		Q1		Q2		Q3			
		Feb	Mar	April	May	June	July	Aug	Sept
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)				
	Main ESA (Basic/Plus) Program (delivery of core single-family in-home services)								
SoCalGas	Customer Experience Technology Platform and Customer Online Audit								System Launch (9/30/24)
	Main ESA (Basic/Plus) Program								
PG&E <sup>12,13,14</sup>	Multifamily Whole Building Program								
	Statewide Multifamily Central Portal								
	Bulk Materials								
	ESA Pilot Plus/Pilot Deep								
	Evaluation for ESA Pilot Plus/Pilot Deep <sup>4</sup>		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 <sup>11</sup>		
	Main ESA (Basic/Plus) Program								
SDG&E	Main ESA (Basic/Plus) Program HVAC and Water Heater Repair and Replacement <sup>11</sup>								
	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"> <li>The program’s washer installer (ARCA) liquidated their company after months of ownership issues and will be unable to fulfill their PY 2023 contract.</li> <li>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> </ul>	<ul style="list-style-type: none"> <li>SoCalGas amended a current Contractor’s contract to include washer installation work with additional funding.</li> <li>High production prime Contractors were reallocated returned funding from low production Contractors.</li> <li>Additional funding was allocated with increased therm saving goals.</li> </ul>





# 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\*

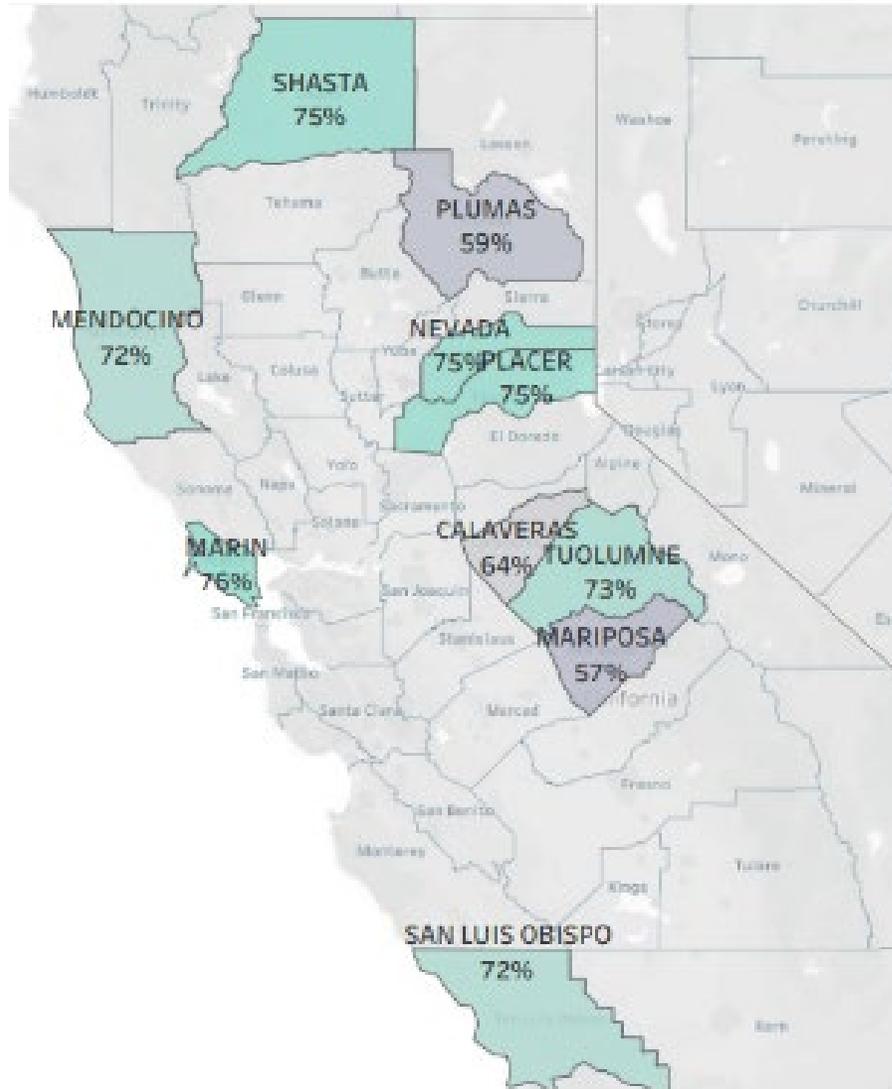
Authorized 2023 Program Budgets and Expenditures				
Utility	2023 Budget	Expenditures	%	Rate Discounts
PG&E	\$13,961,600	\$9,534,834	68%	\$997,985,995
SCE	\$9,128,227	\$7,062,901	77%	\$710,611,683
SDG&E	\$6,922,453	\$6,146,088	89%	\$254,054,642
SoCalGas	\$10,181,364	\$9,062,389	89%	\$266,305,157
<b>Total</b>	<b>\$40,193,644</b>	<b>\$31,806,212</b>		<b>\$2,228,957,477</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%	1,402,942	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
<b>Total</b>	<b>17,178,263</b>	<b>4,695,447</b>		<b>4,867,739</b>		<b>1,037,192</b>

- 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

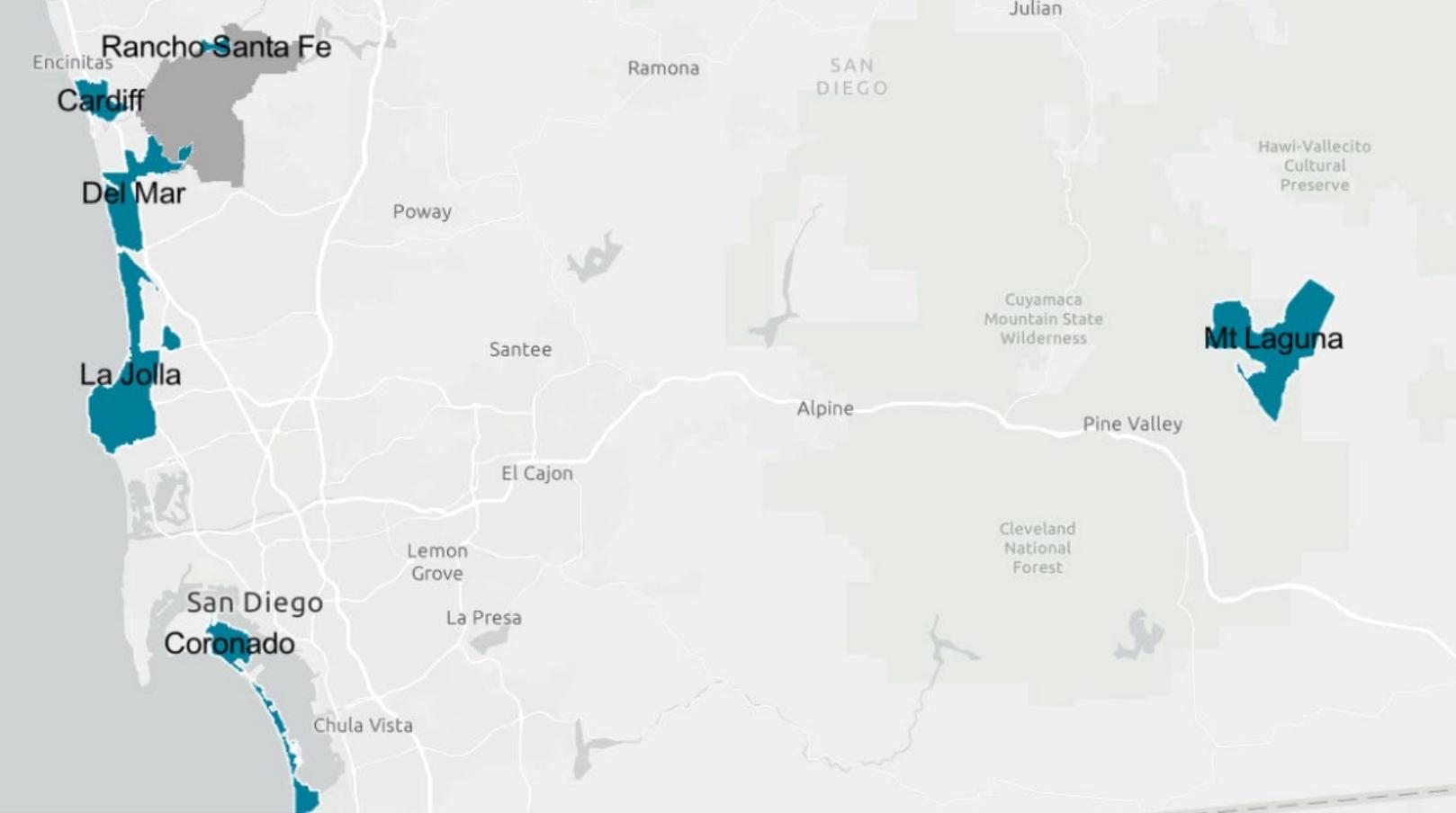
# CARE Program *SCE Enrollment map*



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

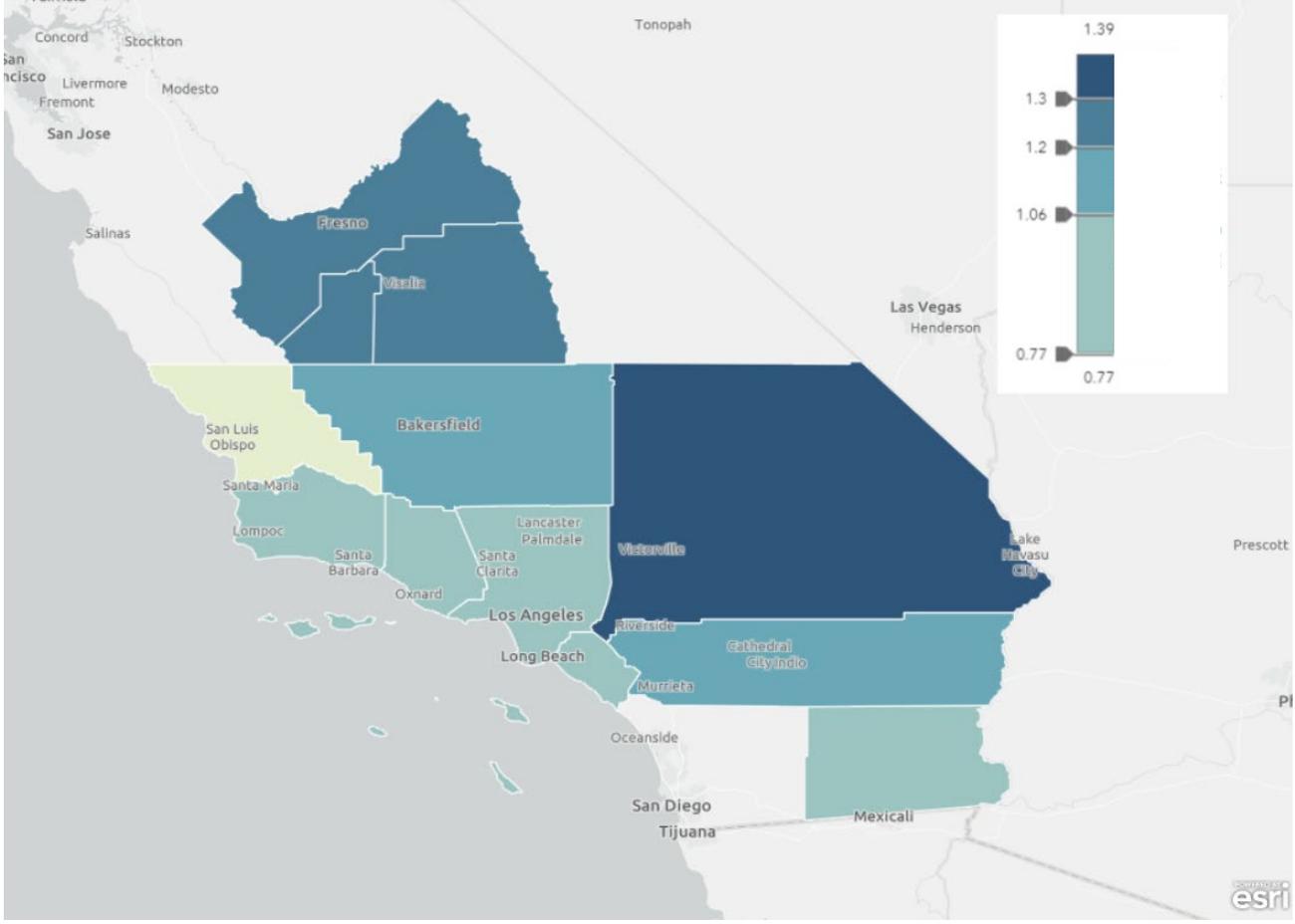
# CARE Program *SDG&E Enrollment Map*



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

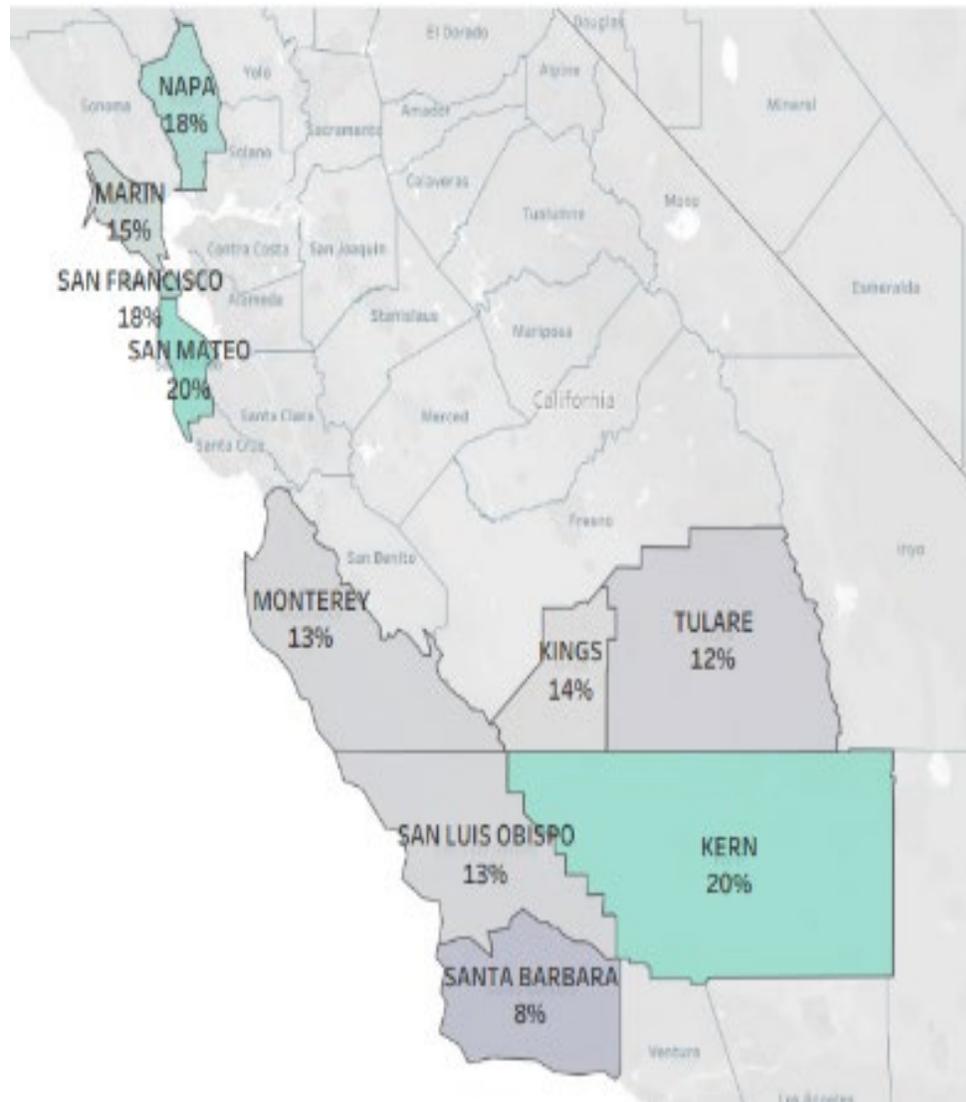
## January – December 2023 FERA Program

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
<b>Total</b>	<b>\$4,857,237</b>	<b>\$3,698,705</b>		<b>\$33,903,338</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%	38,295	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
<b>Total</b>	<b>10,569,623</b>	<b>430,451</b>		<b>79,159</b>		<b>27,993</b>

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

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

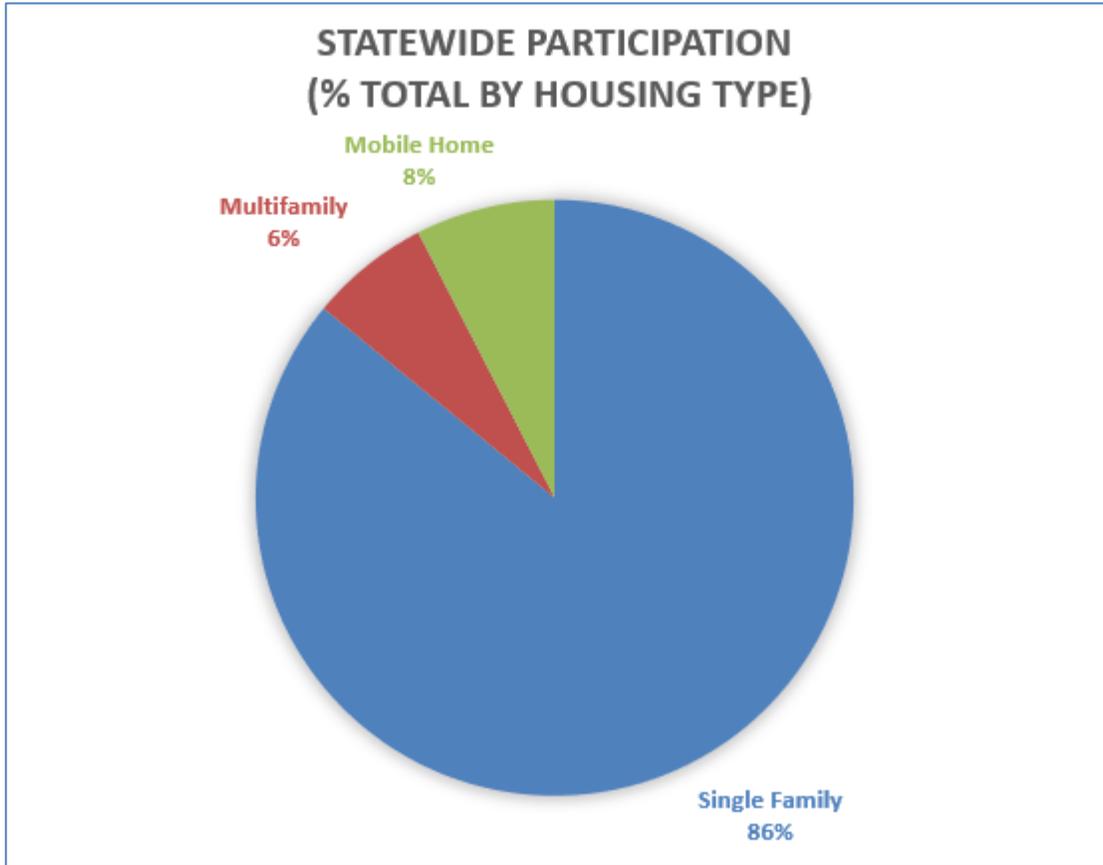
<sup>1</sup> Authorized budgets are the sum as shown in each IOU’s ESA-CARE-FERA Monthly Report, ESA Table 1, Table 1A and/or Table 2B.

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

<sup>3</sup> 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 <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	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%
<b>Total</b>	<b>179,856</b>	<b>131,545</b>		

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

<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 – December 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	28,571,018	1,276,656	396,258,912	22,171,630	7%	6%	35,773,079	1,458,655
SCE <sup>4</sup>	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
<b>TOTAL</b>	<b>36,669,603</b>	<b>2,276,994</b>	<b>497,606,367</b>	<b>38,498,114</b>			<b>60,782,987</b>	<b>3,247,013</b>

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

<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.

<sup>4</sup> 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

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

- 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.

In addition to the Tribal Outreach Grant efforts, PG&E’s general ESA tribal outreach efforts included:

- 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.

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.

## Successes/Challenges

- **Challenges:**  
PG&E Tribal Grantees focused on onboarding and capacity development to execute the grants.
- **Successes:**
  - 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]
<b>Location</b>											
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											
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	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"> <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. 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.</li> <li>• 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.</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: 16</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: 68</li> <li>• Total Reach: 78,000</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 serving 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 it's important to meet them where they are at.</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	
<b>Barona Band of Mission Indians</b>	<b>Mesa Grande Band of Mission Indians</b>
<b>Campo Kumeyaay Nation</b>	<b>Pala Band of Mission Indians</b>
<b>Ewiiapaayp Band of Kumeyaay Indians (Cuyapaipe Reservation)</b>	<b>Pauma Band of Luiseno Indians</b>
Inaja & Cosmit Band of Indians	<b>Rincon Band of Luiseno Indians</b>
<b>Jamul Indian Village</b>	<b>San Pasqual Band of Mission Indians</b>
<b>La Jolla Band of Mission Indians</b>	<b>lipay Nation of Santa Ysabel (Santa Ysabel Reservation)</b>
<b>La Posta Band of Mission Indians</b>	<b>Sycuan Band of Kumeyaay Nation</b>
<b>Los Coyotes Band of Mission Indians</b>	<b>Viejas Band of Kumeyaay Indians</b>
<b>Manzanita Band of Kumeyaay Nation</b>	(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

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
ESA Main (SF, MH, MF in-unit)											
Demographic											
Tribal [2]	21,716	2	0%	181	1%	57	57	0	-	-	395

# 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 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.</li></ul></li></ul>	<ul style="list-style-type: none"><li>• <b>Success:</b> Through December 31, SoCalGas participated in 178 events in Tribal Communities.</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>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, Earth Days, and Spring Fiestas.</li><li>• <b>Challenge:</b> Identifying non-federally recognized Tribes.</li></ul>

# 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.

<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>Morongongo 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	

\*Tribes 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.

<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  
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
<b>Location</b>											
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.



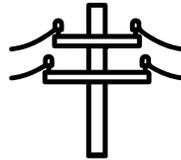
# 2023 Public Safety Power Shutoff (PSPS) Overview

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](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



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 <sup>[1]</sup>	\$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 <sup>[2]</sup>	<u>+ \$9.57</u>
Total remaining unspent funds as of December 31, 2023 <sup>[3]</sup>	\$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)	
<b>Unspent Funds through 12/31/22 [1]</b>	\$ 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
<b>Total Unspent Funds through 12/31/2023</b>	<b>\$ 62.86</b>

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)
<b>Total remaining unspent &amp; uncommitted funds as of December 31, 2023 [7]</b>	<b>\$ 3.61</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. 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
<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	\$74.97
2023 Total Expenses [3]	\$72.21
<b>Total Remaining Unspent Funds as of 12/31/2023 [1]</b>	<b>\$14.07</b>
<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) <sup>[1]</sup>

- 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%<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 : \$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.<sup>[3]</sup>

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.

<sup>[1]</sup> Data as of 12/31/23

<sup>[2]</sup> Number updated to remove 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, 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 <sup>1</sup> :	29,943
Residential Customers reconnected:	28,439

<sup>1</sup>January 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

## Disconnections

Number of disconnections: 1,554

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: 8,728

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%
<b>Total</b>	<b>264,983</b>	<b>90,945</b>	<b>37,880</b>	<b>136,158</b>	<b>34.3%</b>	<b>14.3%</b>	<b>51.4%</b>

- 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*
<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	39
<b>SDG&amp;E<sup>[1]</sup></b> 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	29
<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 <sup>[3]</sup>

\*January – December 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.

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