



# Joint IOUs Program Highlights

Low Income Oversight Board Meeting  
June 26, 2024

Sacramento, CA  
Webex Meeting Format

# PG&E 2024 Program Summary– As of April



CARE	FERA	ESA Portfolio	
Enrollment: 1,391,856 Enrollment Rate: 97% Discounts: \$355,577,787 % Adm. Expenditure: 19%	Enrollment: 38,571 Enrollment Rate: 25% Discounts: \$6,839,255 % Adm. Expenditure: 28%	Energy Savings (ESA Main and N. MFWB): <ul style="list-style-type: none"> <li>• 2,044 kW</li> <li>• 69% YTD</li> <li>• 8,666,584 kWh</li> <li>• 25% YTD</li> <li>• 414,999 therms</li> <li>• 30% YTD</li> </ul>	ESA Main Homes treated: 16,653 <ul style="list-style-type: none"> <li>• 30% YTD</li> </ul> % Expenditure: 19% YTD

## Additional Q1 Highlights

- **Northern Multifamily Whole Building Program (N. MFWB):** As of April 2024, PG&E has treated 5,333 in-units and enrolled 77 multifamily properties and audited 129 whole building projects. PG&E also reserved three whole building projects in Q1 that are anticipated to complete treatment before the end of the year. The SPOC program has referred 290 properties to 65 programs through April, and 38 referrals were converted to applications.
- **Pilot Plus/Pilot Deep (PP/PD):** PP/PD continued to ramp up installations, while improving quality installation. The pilot installed 100 projects from January through April, and increased capacity to serve 35 homes per month (compared to approximately 20 per month at the end of 2023). In addition, the pilot held an all-contractors training session on common inspection findings and solutions to improve quality, as well as a training on integrating electrification.
- **ESA Tribal**
  - **Tribal Outreach Grant Program:** Tribal grantees continued conducting outreach efforts in Q2, which resulted in an additional 18 tribal members referred to the ESA program.
  - **ESA Tribal Homes Treated:** Through April 2024, the ESA program has treated 38 homes.
- **FERA:** The FERA Enrollment Barriers study for PG&E’s service territory is underway. Initial observations show that FERA marketing is sufficient and comprehensive. Research continues on testing hypotheses on enrollment barriers – currently looking at customers' fluctuating income. A customer survey instrument will be deployed in July-August.
- **AMP/Disconnections:** Through April 2024, 402k customers have enrolled with a total of \$280M in arrears forgiven. 56k customers successfully completed the AMP program, resulting in the elimination of their arrearages (includes customers that received CAPP funding). In addition, PG&E has expanded the REACH program with \$50M in 2024 funding to provide support to customers with outstanding arrearages.

# SCE 2024 Program Summary – thru April 2024

## CARE

- Customers Enrolled: 1,322,312
- Enrollment Rate: 102%
- Net New Enrolled Customers: 96,755

## FERA

- Customers Enrolled: 31,288
- Enrollment Rate: 15%
- Net New Enrolled Customers: 2,532

## ESA

- Homes Treated: 9,997
- Energy Savings: 5,034,432 kWh

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

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

## MFWB

- SDGE will be providing the update on Southern MFWB on behalf of SCE.

## Additional Highlights

### ***Tribal***

- As of April 2024, the SCE Tribal team participated in 16 events, fostering partnerships and collaboration with tribal communities. They regularly engage with tribes to promote SCE products and services.

### ***AMP***

- As of April 2024, AMP had 169,920 customers enrolled in the program, with a total of \$88M forgiven since program launch.

### ***ESA***

- Advanced Payments were offered in April to eligible ESA contractors. Advance payments have been distributed to contractors that accepted the terms and conditions.

# SDG&E 2024 Program Summary– As of April 2024

CARE	FERA	ESA Main
<ul style="list-style-type: none"> <li>Customers Enrolled: 334,249</li> <li>Enrollment Rate: 115%</li> <li>New enrollments: 25,441</li> <li>Admin Expenditures: 26%</li> </ul>	<ul style="list-style-type: none"> <li>Customers Enrolled: 9,755</li> <li>Enrollment Rate: 24%</li> <li>Newly Enrolled: 1,253</li> <li>Admin Expenditures: 16%</li> </ul>	<ul style="list-style-type: none"> <li>Homes Treated: 1,148 (29% YTD)</li> <li>kWh Saved: 203,454 (14% YTD)</li> <li>Therms Saved: 3,153 (7% (YTD)</li> <li>Budget: 27%</li> </ul>

## Additional Highlights

**The Southern Multifamily Whole Building (MFWB):** The Program has enrolled 183 properties, completed 130 property assessments, and invoiced 470 completed in-unit treatments, with another 245 in-unit treatments pending invoicing. Despite the promising enrollment rate, the Program has encountered challenges that have hindered project initiation and completion. These include measure pricing that has slowed down contractors willing to participate, implementation delays with the drafting of the policy and procedures manual, and program design elements that are being reviewed and modified. These hurdles have made it difficult for the implementer to maintain project timelines and meet program expectations.

**Pilot Plus/ Pilot Deep:** Contract completed with Implementer (Maroma) in January 2024. First email campaign to 500 eligible customers sent in April, 13 leads have been generated thus far. SDG&E will continue outreach efforts through phone campaigns for enrollment in Q2 2024.

**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. To date, SDG&E hosted 12 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:** As of April 2024, there are 21,559 AMP customers with total arrearages of \$44.7M. 9,953 customers have successfully completed the program with a total of \$37.6M forgiven. SDG&E's Neighbor-to-Neighbor program assisted 797 customers with pledge dollar totals of \$316,564 to assist customers with arrearages.

# SoCalGas Program Summary – As of April 2024



## CARE

- Customers Enrolled: 1,802,618
- Enrollment Rate: 110%
- Newly Enrolled Customers: 121,321

## ESA Main Program

- Homes Treated: 11,701  
17% YTD
- Therms Saved:  
314,824 (26%) YTD
- % Expenditure: 18% YTD

## MFWB

- SDGE will be providing the update on Southern MFWB on behalf of SoCalGas.

## Additional Highlights

### Tribal

- Through April 30, SoCalGas has met with 5 Tribes (3 Federally Recognized and 2 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

- 60,479 customers enrolled in AMP (January - 4/30/24).

### Main ESA Program

- SoCalGas continues constant communication and feedback loop with Contractors and has made the following changes in support:
  - SoCalGas introduced a Weatherization Installation fee on 2/5/24
  - SoCalGas introduced a Gas Appliance Installation fee on 2/5/24
  - SoCalGas introduced an Electric Appliance (High Efficiency Washer) Installation fee on 4/15/24



# **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.caecc.org/energy-savings-assist-programs](http://www.caecc.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.
- Recent updates includes an ADA compliant format.
- 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 June 1, 2024

# ESA Update On Contractor Funding

## January – April 2024

Utility	Funding Issue	Impact
PG&E	No issues to report. PG&E has spent 28% of the ESA Main authorized budget through April 2024, and spent 29% of the measure-level budget.	None
SCE	No issues to report. SCE spent 21% of the ESA Main authorized budget through April 2024. Advanced Payments were offered in April to eligible ESA contractors. Advance payments have been distributed to contractors that accepted the terms and conditions.	Advance payments are intended to support the contractors in their continued efforts to ramp up ESA program operations.
SDG&E	SDG&E’s MFWB Program is facing difficulties due to subcontractors adapting to the new program structure, pricing, and the contractual compensation holdback linked to performance. SDG&E and its Implementer, RHA, are currently in contract negotiations to address these challenges related to subcontractor compensation. <ul style="list-style-type: none"> <li>• ESA Main budget spend is 27%</li> <li>• ESA MFWB budget spend is 10%</li> <li>• ESA Pilot Plus and Pilot Deep budget spend is 4%</li> </ul>	SDG&E is modifying the Southern MFWB contract to address issues raised by subcontractors in the Program. These concerns relate to cash flow, inflation-driven price adjustments for measures, and labor rates. By addressing these issues, we can better support subcontractors and enable them to handle larger in-unit workloads while serving customers effectively.
SoCalGas	On March 6, 2024, SoCalGas Contractors submitted a letter (Contractor Letter) to Commissioners and LIOB Members requesting their prompt intervention in this matter to (1) restore the ESA Program’s effectiveness in the low-income communities we serve and (2) allow contractors to remain in business for continued ESA Program implementation.	SoCalGas is performing a staged approach to review compensation and consider additional adjustments as early as May 2024. SoCalGas will continue its process to evaluate changes to compensation of individual measures.



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

# CARE Program Budgets and Enrollment

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

## January – April 2024 CARE Program Updates\*

Authorized 2024 Program Budgets and Expenditures				
Utility	2024 Budget	Expenditures	%	Rate Discounts
PG&E	\$14,070,600	\$2,665,643	19%	\$355,577,787
SCE	\$9,002,553	\$2,080,951	23%	\$233,398,216
SDG&E	\$7,013,368	\$1,821,443	26%	\$73,312,425
SoCalGas	\$10,465,069	\$2,738,106	26%	\$85,375,974
<b>Total</b>	<b>\$40,551,590</b>	<b>\$9,306,143</b>		<b>\$747,664,402</b>

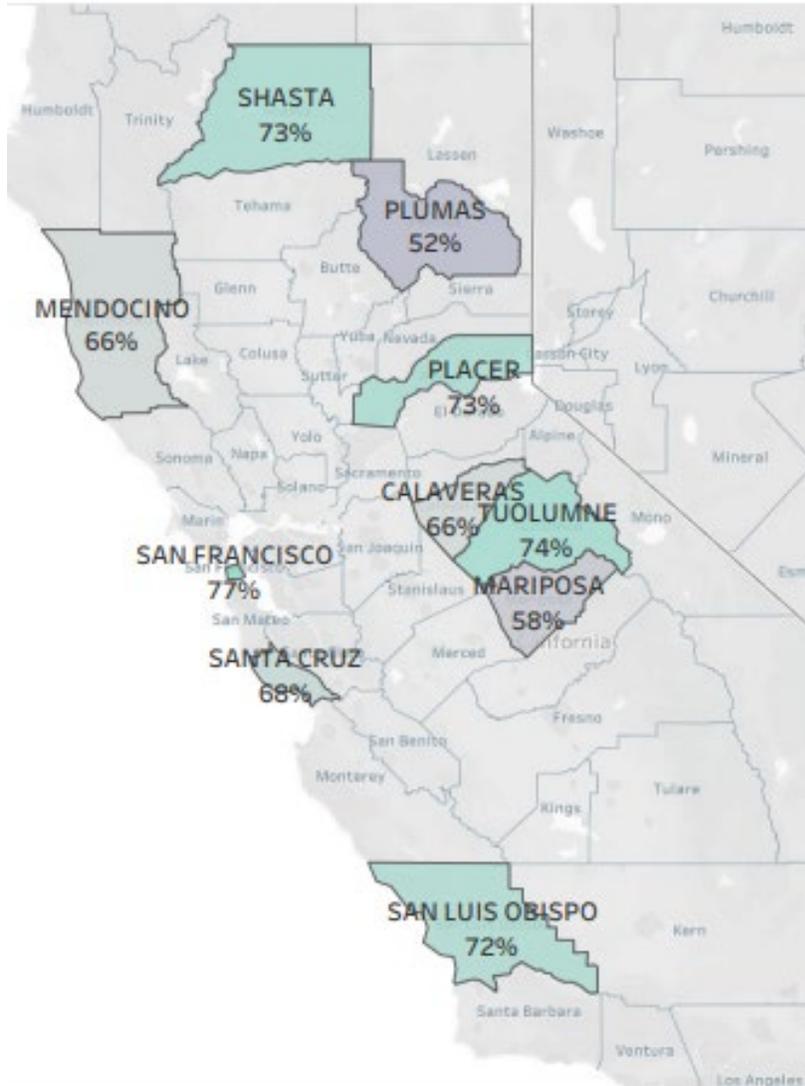
2024 Enrollment						
Utility	Total Residential Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled**	Enrollment Rate	Newly Enrolled Customers
PG&E	5,703,458	1,436,345	25%	1,391,856	97%	100,391
SCE	4,607,540	1,302,665	28%	1,322,312	102%	96,755
SDG&E	1,414,123	289,930	21%	334,249	115%	25,441
SoCalGas	5,772,015	1,639,259	28%	1,802,618	110%	121,321
<b>Total</b>	<b>17,497,136</b>	<b>4,668,199</b>		<b>4,851,035</b>		<b>343,908</b>

\*Authorized budgets pursuant to Decision (D.)21-06-015. January – April 2024 activity as reported in the IOU ESA-CARE-FERA Monthly Reports filed on May 21, 2024

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



# CARE Program PG&E Enrollment Map



PG&E Counties With Lowest Enrollment Rates	
County	Enrollment Rate*
PLUMAS	52%
MARIPOSA	58%
MENDOCINO	66%
CALAVERAS	66%
SANTA CRUZ	68%
SAN LUIS OBISPO	72%
PLACER	73%
SHASTA	73%
TUOLUMNE	74%
SAN FRANCISCO	77%

\*Represents PG&E counties with the lowest enrollment rates, as of April 30, 2024.

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

# CARE Program *SCE Enrollment map*



County	Enrollment Rate*
Kings	118%
San Bernardino	110%
Riverside	109%
Tulare	107%
Los Angeles	105%
Orange	89%
Kern	89%
Ventura	85%
Inyo	65%
Santa Barbara	52%
Mono	36%

\*Represents the enrollment rates for all SCE counties effective April 30, 2024, and excludes counties with less than 1,000 estimated eligible households

# CARE Program *SDG&E Enrollment Map*

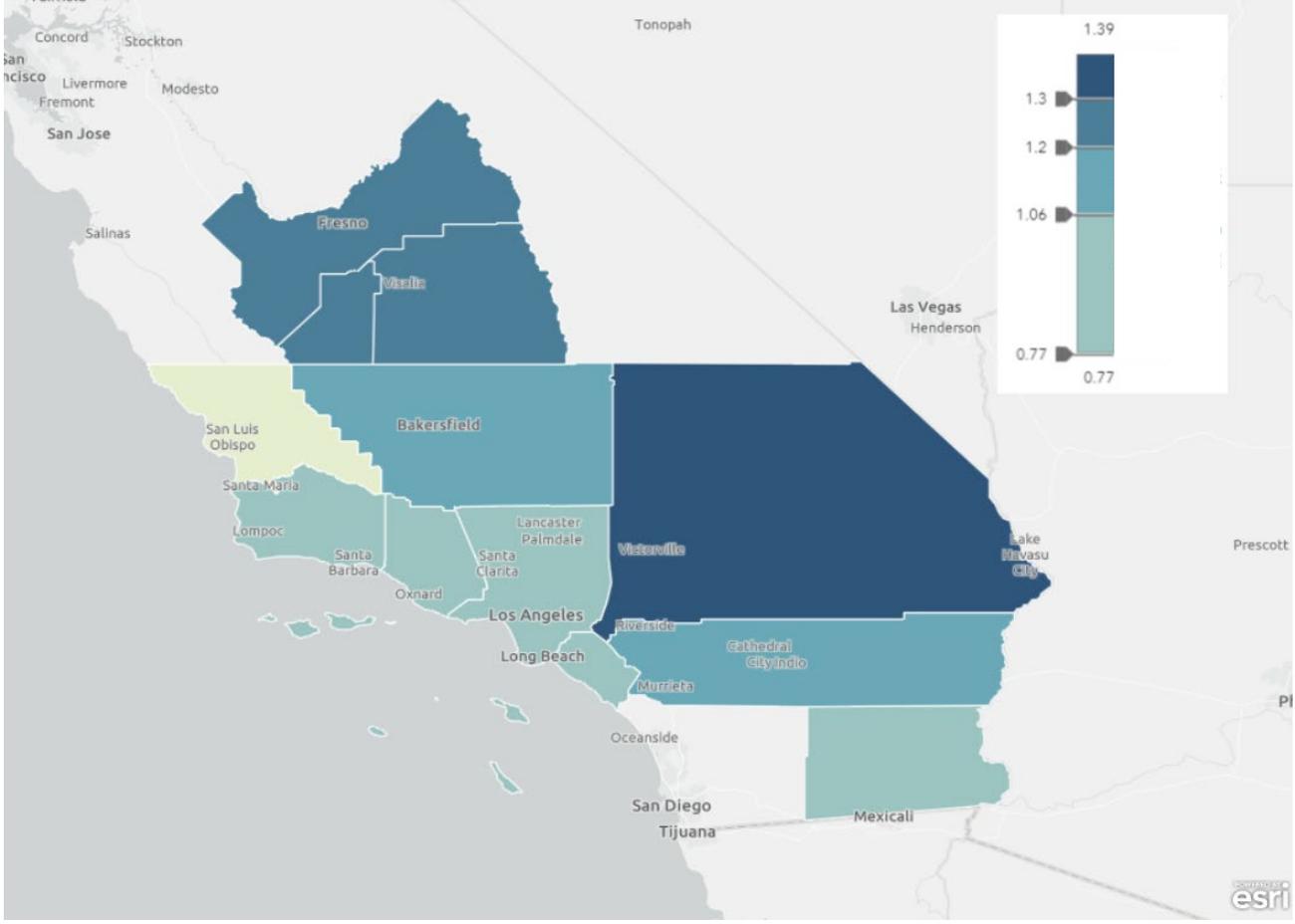


**Zip codes with lowest enrollment rates**

City	Enrollment Rate*
Rancho Santa Fe	18%
Coronado	36%
La Jolla	44%
Del Mar	46%
Solana Beach	48%
Cardiff	55%

\*Represents SDG&E city zip codes with the lowest enrollment rates as of April 30, 2024.

# CARE Program *SoCalGas Enrollment map*



County	Enrollment Rate *
San Bernardino	133%
Kings	132%
Tulare	132%
Fresno	127%
Kern	127%
Riverside	117%
Los Angeles	106%
Ventura	102%
Orange	99%
Imperial	97%
Santa Barbara	92%
San Luis Obispo	74%

\*Represents the enrollment rates for all SoCalGas counties Jan-April 2024, as reported in the IOU ESA-CARE Monthly Report (Filed May 21, 2024).

# FERA Program Budgets and Enrollment

## January – April 2024 FERA Program Updates\*

Authorized 2024 Program Budgets Expenditures				
Utility	2023 Budget	Expenditures	%	Rate Discounts
PG&E	\$2,929,000	\$823,421	28%	\$6,839,255
SCE	\$1,451,640	\$114,268	8%	\$4,101,328
SDG&E	\$621,815	\$100,079	16%	\$1,192,913
<b>Total</b>	<b>\$5,002,455</b>	<b>\$1,037,768</b>		<b>\$12,133,496</b>

2024 Enrollment						
Utility	Total Residential Electric Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled	Enrollment Rate	Newly Enrolled Customers
PG&E	4,843,613	156,547	3%	38,571	25%	4,128
SCE	4,607,540	211,756	5%	31,288	15%	2,532
SDG&E	1,414,123	41,374	3%	9,755	24%	1,253
<b>Total</b>	<b>10,865,276</b>	<b>409,677</b>		<b>79,614</b>		<b>7,913</b>

\*Authorized budgets pursuant to D.21-06-015. Activity through April 30, 2024, as reported in the IOU ESA-CARE-FERA Monthly Reports filed May 21, 2024.



# FERA Program *SCE Enrollment map*



County	Enrollment Rate*
Riverside	18%
Orange	16%
San Bernardino	15%
Ventura	15%
Tulare	14%
Los Angeles	14%
Kern	13%
Kings	13%
Santa Barbara	10%

\*Represents the enrollment rates for all SCE counties effective April 30, 2024, 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	9%
Santa Ysabel	13%
Dana Point	14%
La Jolla	15%
Pala	15%
Fallbrook	15%
Julian	16%
Bonsall	17%

\*Represents SDG&E city zip codes with the lowest enrollment rates as of April 30, 2024.

# 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.

## 2024 ESA Program Budget Updates January – April 2024\*

Utility	Authorized Budget <sup>1</sup>	YTD Expenditures <sup>2</sup>	%
PG&E	\$223,985,307	\$ 41,826,003	19%
SCE	\$96,282,711	\$ 13,298,965	14%
SDG&E <sup>3</sup>	\$30,210,203	\$ 6,076,470	20%
SoCalGas	\$95,080,003	\$ 16,818,083	18%
<b>Total</b>	<b>\$445,558,224</b>	<b>\$ 78,019,521</b>	<b>18%</b>

\* Activity through April 30, 2024, as reported in the IOU ESA-CARE-FERA Monthly Reports filed May 21, 2024.

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

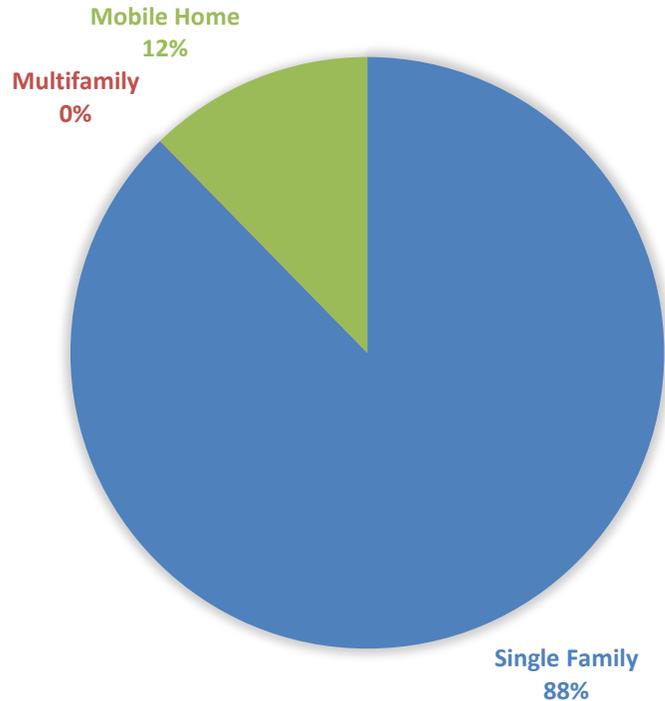
<sup>2</sup> Expenditures are the sum of amounts shown in each IOU’s ESA-CARE-FERA Monthly Report, ESA Table 1, Table 1A and/or Table 2B.

<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

STATEWIDE PARTICIPATION  
(% TOTAL BY HOUSING TYPE)



2024 Households Treated  
January – April 2024

2024 Households Treated <sup>1</sup>				
Utility	Est. HH Treated Target	Total	Total as % of 2024 Treated	Total as % of Eligible ESA HH
PG&E	54,876	16,653	30%	0.90%
SCE	64,922	9,997	15%	0.59%
SDG&E	14,188	1,148	8%	0.40%
SoCalGas	69,837	11,701	17%	0.56%
<b>Total</b>	<b>203,823</b>	<b>39,499</b>		

<sup>1</sup> Activity through April 30, 2024, as reported in the IOU ESA-CARE-FERA Monthly Reports filed May 21, 2024.



# Energy Savings Assistance Program Energy Savings Update

## 2024 Energy Savings Targets January – April 2024

2024 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 Goals <sup>3</sup>	
Utility	ESA kWh	ESA Therms	kWh	therms	kWh	therms	kWh	therms
PG&E	8,666,584	414,999	93,723,084	5,795,244	9%	7%	34,253,799	1,393,298
SCE <sup>4</sup>	5,034,432	N/A	118,524,432	N/A	4%	N/A	31,762,240	383,213
SDG&E	203,454	3,153	4,876,704	297,562	4%	1.1%	2,769,999	115,389
SoCalGas	N/A	314,824	N/A	3,914,687	N/A	8.0%	N/A	1,435,220
<b>TOTAL</b>	<b>13,904,470</b>	<b>733,005</b>	<b>217,124,220</b>	<b>10,007,492</b>			<b>68,786,038</b>	<b>3,327,120</b>

<sup>1</sup> Activity through April 30, 2024, as reported in the IOU ESA-CARE-FERA Monthly Reports filed May 21, 2024.

<sup>2</sup> Derived from average CARE Customers Usage for PY 2023 (Annual Report CARE Table 9) multiplied by January 1- April 2024 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 – April 2024 MULTIFAMILY UPDATES

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

- **PG&E:** As of April 2024, PG&E has treated 5,333 in-units with 969,340 kWh and 53,654 therm savings. The program has also enrolled 77 multifamily properties, and audited 129 whole building projects. PG&E also reserved three whole building projects in Q1 that are anticipated to complete treatment before the end of the year. The SPOC program has referred 290 properties to 65 programs through April, and 38 referrals were converted to applications.
- **SCE:** By the end of April, SCE SPOC provided RHA 51 property level referrals, 438 residential leads, and 7 referrals that SCE received from SOMAH for possible participation in MFWB. SCE's SPOC continues to provide additional multifamily program information to property owners who refused or were ineligible for participation in MFWB. These programs include SOMAH, Charge Ready, SGIP, LIWP, SoCalREN, etc. Additionally, once MFWB participants complete participation, SCE's SPOC will work with property owners to identify additional opportunities for program layering.
- **SDG&E:** To date, SDG&E's SPOC referred 405 MF properties to the ESA MFWB program and continues to leverage programs including but not limited to SOMAH, RZNET, and OBF. SPOC continues to outreach to local and nonprofit community organizations to engage with hard-to-reach communities. SPOC established relationship with SD county water authority.
- **SoCalGas:** SoCalGas SPOCs have delivered 27 common area projects; however, the implementer has not yet moved forward with the projects as of April 30, 2024. Additionally, over 4,500 property leads for either in-unit treatment or whole building projects have been provided to the implementer to date.

### **MFWB Program:**

- **PG&E:** In April 2024, PG&E's Northern Multifamily Whole Building (N. MFWB) program treated 1,582 in-unit projects with 309,057 kWh, 77 kW, and 19,137 therms saved, bringing the YTD in-unit treatment total to 5,333. The program has enrolled 217 and audited 97 whole building (WB) projects as of April 2024. PG&E also approved three whole building projects for incentive reservations in April, these three projects are expected to deliver 7,378 therms and 1,311 kWh savings before the end of the year. The Northern MFWB program currently has 544 whole building projects with 40,605 in-unit projects in the pipeline.
- **Southern MFWB (SDG&E, SCE & SoCalGas):** The Southern MFWB Program has experienced a slower than anticipated start and has not completed any whole building projects. However, for the month of April it has completed 40 property enrollments, and 20 property assessments. Bringing the total whole building enrollments to 183 properties (50 in SDG&E's service territory, 7 in SCE's service territory, 45 in SoCalGas's service territory, and 79 in SCE/SoCalGas's combined service territory, and 2 in SoCalGas's/SDG&E's combined service territory), 130 completed property assessments, and invoiced 470 completed in-units with another 245 pending invoicing. These activities will be captured in the May Monthly reporting to the Energy Division. The Program continues to maintain a pipeline of 978 qualified leads across the southern IOUs service territory. Despite the promising enrollment rate, the Program has encountered challenges that have hindered project initiation and completion. These include measure pricing that has slowed down contractors willing to participate, implementation delays with the drafting of the policy and procedures manual, and program design elements that are being reviewed and modified. These hurdles have made it difficult for the implementer to maintain project timelines and meet program expectations.

# Tribal Community Outreach Update – PG&E



## Compliance/Outreach Activities as of April 2024

PG&E continued its efforts in implementing the 2023/24 Tribal Outreach Grant program.

In Q1 2024, the three Tribal grantees provided PG&E with a list of 18 additional tribal members that the ESA contractors could potentially start making home visits with and install measures.

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

- On February 3, 2024, at the 4<sup>th</sup> Annual North Fork Women’s Conference, 128 Native American Women took part in a full day of activities. Information and resources were provided to assist with growing energy cost inflation, and to obtain information on services the tribes can offer. Information on PG&E discounts and programs were housed with outreach booths, and included information on the ESA, CARE, FERA, and REACH programs.
- On March 11, 2024, at the Community Wellness Connection meeting, 23 tribal citizens were in attendance to hear about emergency preparations and information about solar programs. PG&E materials were made available for participants at the meeting.
- On April 20, 2024, at the Earth Day Event, PG&E had a booth where 157 Native American individuals attended the event and provided information about ESA, CARE, CARE, and other PG&E programs.

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:

- The main challenge for this period was losing one of the Tribal Outreach Grant program recipients. The tribe decided that they could not continue with the grant program because they lacked the staffing needed to continue supporting the grant. They ended their participation with the grant program in January.

Successes:

- The two remaining 2023 Tribal Outreach Grant participants continued their outreach efforts to their members. Because of these efforts, PG&E has an additional 18 tribe members who were referred to the ESA program implementers.
- Through April, five tribes have met and conferred with PG&E staff, and have been provided with information, about PG&E Assistance Programs, energy usage, resiliency, safety, and other community initiatives.

# PG&E Tribal Community Outreach Update



Outreach Activities	Number of Participating Tribes*
Tribes completed ESA Meet & Confer**	5
Tribes requested outreach materials or applications	1
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	2
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	0

\* 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 April 30, 2024											
ESA Main (SF, MH)											
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][21]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only) [5][21]	Avg. Peak Demand Savings (kW) Per Treated Household [21]	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures) [4][21]	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only) [5][21]	Avg. Cost Per Treated Households [21]
Tribal [20]	1,911	38	2%	46	83%	568.14	568.14	0	21.12	22.41	\$ 1,736

# 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.
- Q1 Outreach:
  - During April, the SCE Tribal team actively took part in four Tribal Earth Day events at Soboba, Pechanga, Morongo and Bishop Paiute. In collaboration with internal partners from Local Public Affairs, PSPS, and Native American Alliance, SCE disseminated details about Income Qualified Programs including CARE, FERA and ESA and fielded inquiries concerning wildfire safety and mitigation efforts.
  - Furthermore, the team convened with representatives from Bridgeport Indian Colony, Soboba Band of Luiseno Indians, Bishop Paiute, Morongo, Benton Paiute, Timbisha Shoshone, and Chemehuevi Indian Tribe to discuss the mini grant opportunities.

## Successes and Challenges

- Successes:
  - Bridgeport Indian Colony and Soboba Band of Luiseno Indians have signed mini-grant agreements.
  - As of April 2024, the tribal task force team actively engaged in 16 events.
- Challenges:
  - Identifying and building relationships with non-federally recognized 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 April 2024											
ESA Main (SF, MH)											
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	60	0.68%	25	240%	472	448	0.080	10.81	10.81	\$ 650

# SDG&E Tribal Community Outreach Update

OUTREACH ACTIVITIES (in accordance with D.21-06-015)	SUCCESSSES & CHALLENGES
<ul style="list-style-type: none"> <li>• Tribal Relations Manager has contacted all Tribes SDG&amp;E serves to exchange information.               <ul style="list-style-type: none"> <li>• In 2024, has met with 14 tribal nations.</li> </ul> </li> <li>• Seven tribes were awarded mini-grants. Three tribes have completed their financial documents. Three received payment as of April 2024. Two additional tribes have expressed interest in grants and are working on gathering financial documents.</li> <li>• Hosted twelve Community Resource Fairs in 2024 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: 2</li> <li>• Total Reach: 120</li> </ul> </li> <li>• <b>Southern California American Indian Resource Center (SCAIR)</b> <ul style="list-style-type: none"> <li>• Total Outreach Activities YTD: 15</li> <li>• Total Reach: 7,100</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.

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>Iipay 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 Tribal Segment Reporting\*



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

San Diego Gas & Electric Company

April 2024

ESA Main (SF, MH)											
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) [4]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only) [5]	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures) [4]	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only) [5]	Avg. Cost Per Treated Households
Demographic											
Tribal [18]	21,716	-	0%	99	0%	-	-	-	-	-	-

\*As reported in SDG&E's Amended Low-Income Monthly Report filed on June 11, 2024.

# 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 April 30, SoCalGas has completed meetings with 5 Tribes in service territory. SoCalGas is meeting with each tribe and establishing a point of contact for Low Income decision programs.</li></ul></li></ul>	<ul style="list-style-type: none"><li>• <b>Success:</b> Through April 30, SoCalGas participated in 66 events in Tribal Communities.</li><li>• <b>Success:</b> Brought on board a Federally Recognized Tribe to be a Community Partner and help build awareness on Customer Assistance Programs to their community.</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>Morongo Band of Cahuilla Mission Indians</b>	Tule River Indian Tribe of the Tule River Reservation
<b>Pechanga Band of Luiseño Mission Indians of the Pechanga Reservation</b>	<b>Twenty-Nine Palms Band of Mission Indians of California</b>
Ramona Band of Cahuilla Indians	

- 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>	

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

# SoCalGas Tribal Segment Reporting

**Energy Savings Assistance Program Table - 7 Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions  
Southern California Gas Company  
April 2024**

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	8	23%	108	7.4%				14.6	14.6	\$ 439

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





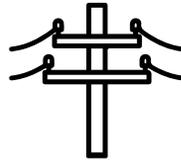
# 2023 Public Safety Power Shutoff (PSPS) Overview<sup>[1]</sup>

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<sup>[2]</sup>**

~700



**Community  
Resource Centers**

12 open with over  
1,371 customer visits

<sup>[1]</sup> There were no PG&E PSPS events that occurred in January through March 2024.

<sup>[2]</sup> Approximate data as of December 2023.

# Community Resource Centers (CRCs)

During Public Safety Power Shutoffs, Community Resource Centers provide resources and up-to-date information.

## Customer Resources:

- Personal and medical device charging
- Mobile battery chargers
- ADA-accessible restroom
- Cooling/heating\*
- Bottled water/snacks
- Seating
- Ice\*



 Customers can learn more at [pge.com/crc](https://pge.com/crc).

*\*Indoor locations only*

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

# Resources for Customers with Access and Functional Needs

We provide support options for **customers with Access and Functional Needs**, through our Medical Baseline and Vulnerable Customer Status programs.

## Medical Baseline (MBL) Program

- ✓ A monthly **discount or additional monthly allotment of power** based on rates.
- ✓ **Additional notifications** ahead of Public Safety Power Shutoffs.
- ✓ Participants **qualify through medical device or medical condition needs**.
- ✓ Potential to qualify for **additional resources** including the generator rebate, portable battery or a Backup Power Transfer Meter.

 Customers can learn more at [pge.com/mbi](https://pge.com/mbi).

## Self Identified Vulnerable Customer Status

- ✓ Various **financial support programs** available for customers who have fallen behind on bills or additional programs to help customers save.
- ✓ **Additional notifications** ahead of Public Safety Power Shutoffs.
- ✓ **Service disconnection notifications** 48 hours prior or at the time of disconnection due to nonpayment.
- ✓ Potential to qualify for **additional resources**, including portable batteries

 Customers can learn more at [pge.com/vcstatus](https://pge.com/vcstatus).

## We provide additional notifications to our most vulnerable customers.

- We will notify Medical Baseline or Self-Identified Vulnerable customers before a Public Safety Power Shutoff via **phone call, text or email**.
- If the customer does not respond to these notifications, we will make additional attempts to reach them by **ringing their doorbell or leaving a doorhanger**.

**i** Apply to the Medical Baseline Program at:  
[pge.com/medicalbaseline](https://pge.com/medicalbaseline).

**i** Self-certify for Vulnerable Customer status at:  
[pge.com/vcstatus](https://pge.com/vcstatus).



# 2024 SCE PSPS OVERVIEW



Jan – May 2024

Statistics	Activations	Customer Interruptions	Circuit Interruptions	Customer Minutes of Interruption
Jan – May 2024	0*	0	0	N/A

\*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



### 2024 COMMUNITY CARE RESOURCES

#### 68 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

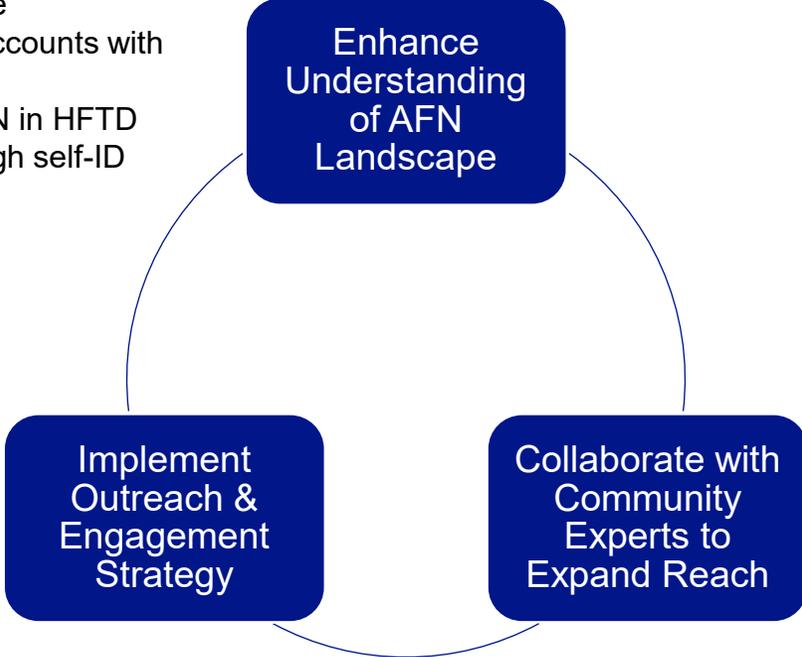
The CCBB program offers eligible customers a free portable battery and solar panel to power medical devices during PSPS events. The program expanded in 2022, reaching additional customers, with over 15k batteries delivered since its inception. Customers in HFTDs can receive a \$150 rebate for portable 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.

- We continue to collaborate with the California Foundation of Independent Living Centers (CFILC) to provide comprehensive assistance to customers with disabilities. This support extends before, during, and after PSPS.
- Maintained partnership with 211 to support customers with AFN
- The AFN Self-Identification Survey led to marketing campaigns promoting awareness of AFN programs and services that will run through Q4 and encouraging customers to prepare for potential PSPS.
- Continue to expand partnerships with local food banks to provide food support.
- To date 2024, CCBB has deployed 323 batteries and distributed 15,160 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 712 Portable Power Station Rebates and 114 Portable Generator Rebates.

# Mitigation of Impacts for Individuals with AFN



- Mapped AFN customers across database
  - ~34% total residential customer accounts with AFN
  - ~11% customer accounts with AFN in HFTD
  - ~9,700 customers identified through self-ID



- AFN Self-ID messaging added to monthly social media toolkit
- Expanding messaging with support partners (211, CERTs)
- Added AFN Self-ID information to Wildfire Newsletter
- Added AFN Self-ID webform on SDG&E website

- AFN Councils, Regional Working Groups and Core Planning team
- AFN Support Partners (e.g., 211)
- Partnerships with State, County and Local Orgs
- Focus on enhancing partnerships with CBOs supporting disabled veterans

## 15 Unique Identifiers

CARE	FERA	Medical Baseline
Life Support	Temperature Sensitive	Large Font Bill
Braille Bill	AFN Self ID	Hearing Impairment
Visual Impairment	Disability	Senior
Non-English	Durable Medical Equipment	Assistive Technology

# 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, 2023 <sup>[1][2]</sup>	\$84.70
2024 Revenues Collected (Jan - Apr)	+ \$48.59
2024 Expenses (Jan - Apr)	- \$41.83
2024 Accrued Interest (Jan - Apr)	+ <u>\$1.62</u>
Total remaining unspent funds as of April 30, 2024 <sup>[3]</sup>	\$93.07

1. Committed unspent fund carry forward to 2024 according to fund shifting rules for MF CAM, SPOC, Pilots, Studies, Pilot Plus and Pilot Deep, and SASH/MASH. \$26M of unspent fund is being used to off-set 2024 budget revenue requirement.
2. Includes \$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 from 2023 to 2024 for MFWB, SPOC, Pilots, Studies, Pilot Plus and Pilot Deep, and SASH/MASH. Remaining \$40.9M will either carry forward and/or being used to off-set future collection according to fund shifting rules.

# SCE’s Unspent Funds for ESA Program

<b>Total Remaining Unspent Funds (\$M)</b>		
<b>Unspent Funds through 12/31/23</b> <sup>[1][2]</sup>	\$	62.97
2024 Revenue Collected (Jan – Apr)	\$	30.33
2024 Expenses from (Jan –Apr)	\$	(20.47)
2024 Accrued Interest (Jan- Apr)	\$	1.22
<b>Total Unspent Funds through 04/30/2024</b>	\$	74.05

1. This is the remaining Unspent Funds amount from 2009-2023 program cycles through December 31, 2023.
2. Includes \$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]	
Unspent funds available in Balancing Account as of December 31, 2023	\$ 31.34
Remaining unspent & uncommitted funds used to offset 2024 revenue requirement [2]	\$ (10.00)
Revenues collected through YTD April 2024	\$ 3.27
Expenses incurred through YTD April 2024	\$ (2.29)
ESA MFWB – SCE & SCG funding net of expenses	\$ (7.33)
Total remaining unspent funds as of April 30, 2024	\$ 14.99
Remaining committed funds as of December 31, 2023 [3]	\$ (10.40)
<b>Total remaining unspent &amp; uncommitted funds as of April 30, 2024 [4]</b>	<b>\$ 4.59</b>

1. Unspent funds are only available for ESA activities.

2. 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.

3. Remaining committed funds consist of \$2.15 million for ESA Main, \$5.11 million for ESA MFWB, \$2.82 million for ESA Pilot Plus & Pilot Deep, and \$.32 million in SASH/MASH funds. 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.

4. 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 – 2023 Revenues Collected	\$84.09
2021 – 2023 Total Expenses [2]	\$297.74
<b>Total Remaining Unspent Funds through PY 2023 [1]</b>	<b>\$8.57</b>
2024 Revenues Collected	\$28.53
2024 Total Expenses [3]	\$17.07
<b>Total Remaining Unspent Funds as of 4/30/2024 [1]</b>	<b>\$20.03</b>
<u>Footnotes</u>	

[1] Unspent Funds related to Revenues Collected

[2] Total Expenses from Annual Reports

[3] Total Expenses from April 2024'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 April 2024

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

- Number of customers enrolled since launch : 402k
  - Gross percentage of eligible households enrolled: 90%
  - Number successfully completed 12-month enrollment since program launched in Feb. 2021: 56k
    - Percentage of total enrollments since launch that have successfully completed AMP: 14%<sup>[2]</sup>
- Average length of participation for customers who do not finish the 12 months is three months.
- Total amount forgiven since program launch : \$280M

## 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 April 2024 Monthly Disconnect Data Report.<sup>[3]</sup>

Throughout 2024, PG&E continues to engage with customers through the following collection touchpoints:

- 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, AMP, and REACH marketing campaigns
- Qualitative research project on customer payment behaviors.

## AMP Case Management

### AMP Missed Payment Notifications

- PG&E continues to contact customers upon their first missed payment of current billing charges. PG&E also continues to conduct AMP eligible callout campaigns and includes AMP messaging in CARE/FERA outreach. Note: To date, PG&E has enrolled 90% of its total eligible population.

<sup>[1]</sup> Data as of 4/30/2024

<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 April 2024 Monthly Disconnect Data Report](#), reporting 2024 activity through April, last accessed on June 12, 2024.

# SCE Disconnections Status and AMP – Through April 2024

## Arrearage Management Plan (AMP)

- Number of customers enrolled: 169,920
  - Percentage of eligible households enrolled: 13%
  - Number successfully completed 12-month program launched since Feb. 2021: 12,394
    - 7% 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: \$315M
- Total amount forgiven: \$88M

## Disconnections/Reconnections

Residential disconnections 2024 <sup>1</sup> :	7,526
Residential Customers reconnected:	5,445

<sup>1</sup>January to April 2024

## 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)

- 2024 (YTD)\* – 262 calls completed



### AMP Delayed Billing outreach

- 2024 (YTD)\* - 234 letters mailed



# SDG&E Disconnections Status and AMP – Through April 2024

## Arrearage Management Plan (AMP)\*

- Number of customers enrolled: 21,559
- Percentage of eligible households enrolled: 56%
- Number of customers successfully completed 12-month program since Feb. 2021 launch: 9,953
  - 20% 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: \$44.7M
- Total amount forgiven: \$37.6M

## Disconnections

Number of disconnections: 10,626

Resumption of residential credit collection efforts started in Q3 2023.

## AMP Marketing

### Targeted Communications

- Included AMP messaging in CARE-eligible monthly bill comparison email
- Targeted outbound calls and emails to eligible customers

### 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: 797

Total Amount Spent: \$316,564

\*SDG&E shareholder funded utility assistance program

# SoCalGas Disconnections Status and AMP – Through April 30 2024



## Arrearage Management Plan (AMP)\*

- Number of customers enrolled (1/1/2024- 4/30/24) : 60,479
- Percentage of eligible households enrolled : 70.2 %
- Total arrearages (1/1/2024- 4/30/24) : \$57.5M Total amount forgiven (1/1/2024- 4/30/24) : \$6.3M
- Number and percentage of enrolled customers who successfully completed AMP

AMP Numbers	Total Enrolled	Active	Completed	Terminated	% Active	% Completed	% Terminated
Enrollment date 2/1/2021 -12/31/2022	116,804	27,785	36,785	80,019	23.8%	31.5%	68.5%
Enrollment Date 1/1/2023- 12/31/2023	148,179	111,539	12,549	76,107	75.3%	8.5%	51.4%
Enrollment date 1/1/2024-4/30/2024	60,479	56,371	0	8,880	93.2%	0%	14.7%
<b>Total</b>	<b>325,462</b>	<b>N/A</b>	<b>49,334</b>	<b>165,006</b>	<b>N/A</b>	<b>15.2%</b>	<b>50.7%</b>

- Average length of participation for customers who did not complete the 12-month program
  - For those enrolled between 1/1/2024-4/30/2024 the average length of enrollment in the program was 4 months

\*Data through 4/30/2024. updated on 06/7/2024

### Disconnections

Number of disconnections, Jan 1, 2024 – April 30, 2024:  
327 residential disconnections have occurred during this time frame.

### 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.

	2020	2021	2022	2023	YTD 2024*
<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>	218	294	285	39	40
<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>	5	30	8	29	1
<b>PG&amp;E</b> For additional DR program information, please visit: <a href="https://www.pge.com/energy-incentive-programs">Energy incentive programs (pge.com)</a>	360	514	1,168	943	0 <sup>[2]</sup>

\*January – April 2024

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

<sup>[2]</sup> PG&E's SmartAC Smart Thermostat program has closed enrollment for 2024.



# ESA Fund Shifting Activities for 2023

# Fund Shifting Activity as Reported in 2023 Annual Report



## ESA Program

2023 SDG&E ESA fund shifting activities included the following [1]:

- \$924,580 shifted from the Domestic Hot Water and Lighting categories to the Customer Enrollment category
- \$948,547 shifted from the Enclosure category to the Implementer Compensation category
- \$608,509 shifted from the HVAC Electric category to the HVAC Gas category
- \$67,462 shifted from the Training Center category to the Inspections category

## CARE Program

2023 SDG&E CARE fund shifting activities included the following [2]:

- \$1,211,704 shifted from the Outreach and IT Programming categories to the Processing, Certification, Recertification category
- \$13,739 shifted from the General Administration category to the CHANGES category

## FERA Program

2023 SDG&E FERA fund shifting activities included the following [3]:

- \$37,034 shifted from the Measurement & Evaluation category to the Marketing, Education & Outreach; Processing, Certification, Recertification; Post Enrollment Verification; and Regulatory Compliance categories

1. In accordance with Section 20.1 of D.08-11-031 as modified by D.10-10-008, 16-11-022, D.17-12-009, and D.21-06-015. In D.21-06-015, the Commission revised the fund shift rules allowing flexibility to shift funds between the categories and fuel type.

2. In accordance with D.08-11-031 as modified by D.10-10-008, D. 10-16-11-022, D 17-12-009 and D.21-06-015, which granted the IOUs authority to shift funds between the CARE program categories.

3. In accordance with D.21-06-015, which granted the IOUs authority to shift funds between the FERA program categories.

# SCE's Fund Shift Activity

## PY 2023 Fund shift Activity

- \$547,438 shifted from EE current year authorized to MF CAM
- \$313,249 carry forward to 2024 for Measurement and Evaluation Studies
- \$3,566,115 carry forward to 2024 for MFWB
- \$3,265,512 carry forward to 2024 for Pilot Plus and Pilot Deep
- \$7,491,604 carry forward to 2024 BE Pilot
- \$1,179,161 carry forward to 2024 for Clean Energy Homes Pilot
- \$6,159,288 carry forward to 2024 for SASH and MASH Unspent Funds

## PY 2024 Fund shift Activity

- No fund shifting activity from Jan. – Apr. 2024

# PG&E's Fund Shifting Activity for 2023 and 2024

## PY 2023 ESA Program

In 2023, PG&E's ESA fund shifting activities included the following:

- Fund shifting \$6,225,173 from electric budget categories to gas budget categories.
- Fund shifting \$8,031,935 from electric budget categories to electric budget categories.
- Fund shifting \$6,528,460 from gas budget categories to gas budget categories.
- Carried forward \$47,750,475 from 2022 to 2023 for Pilot, Studies, MF SPOC, MF CAM, and PP/PD budget categories.
- Carried forward \$52,228,118 from 2023 to 2024 for Pilot, Studies, MFWB (includes SPOC, In-Unit, CAM and WB, CSD Leveraging, and Implementer administrative budget categories), PP/PD, and SASH/MASH Unspent Funds budget categories.
- Any remaining uncommitted and unspent funds that were not allowed to carry forward to 2024 will be used to offset future collection. PG&E requested to use \$26M in ESA electric unspent fund to off-set 2024 collection.<sup>[1]</sup>

## PY 2023 CARE Program

In 2023, PG&E's CARE fund shifting activities in 2023 included moving \$147,821 from the Outreach category to the PEV category, and \$413,892 from the Outreach category to IT Programming category.<sup>[2]</sup>

## PY 2023 FERA Program

In 2023, PG&E's FERA fund shifting activities in 2023 included moving \$3,203 from the Processing, Certification, Recertification budget category to the Outreach budget category.<sup>[3]</sup>

## PY 2024 ESA, CARE and FERA Programs

There has been no ESA, CARE or FERA program fund shifting activities that have occurred from January through April 2024.

<sup>[1]</sup> Submitted via PG&E's Annual Electric True-Up AL 7116-E.

<sup>[2]</sup> In compliance with D.12-08-044, as updated in D.16-11-022, D.17-12-009 and D.21-06-015.

<sup>[3]</sup> In compliance with D.21-06-015.

## PY 2023 CARE Program

In 2023, SoCalGas' CARE Program fund shifting activities included the following:

- Fund shifting \$170,115 to Outreach from Processing, Certification, Recertification.

## PY 2023 ESA Program

There was no ESA Program fund shifting in 2023.

## PY 2024 ESA and CARE Programs

There has been no ESA or CARE Program fund shifting from January through April 2024.