BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA

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

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

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Dated: May 1, 2024

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In accordance with Decisions (D.) 12-08-044, 16-11-022, and 21-06-015 and the annual reporting directives contained therein, Pacific Gas and Electric Company (PG&E) files the attached Annual Report on the results of its Energy Savings Assistance (ESA), California Alternative Rates for Energy (CARE), and Family Electric Rate Assistance (FERA) program efforts for the 2023 program year. PG&E is filing and serving this annual report in Application (A.) 19-11-003, et al.

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Respectfully Submitted,

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By: *___/s/ Jennifer C. Reyes Lagunero_____*
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ATTACHMENT

Pacific Gas and Electric Company®

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

2023 ANNUAL REPORT

May 1, 2024

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2023 ANNUAL REPORT
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2023 Energy Savings Assistance, California Alternate Rates for Energy and Family Energy Rate Assistance Programs Executive Summary

Pacific Gas and Electric Company (PG&E or Company) is pleased to submit its Energy Savings Assistance (ESA), California Alternative Rates for Energy (CARE), and Family Electric Rate Assistance (FERA) programs' annual report[1] to the California Public Utilities Commission (CPUC or Commission) for the reporting period January 1, 2023, through December 31, 2023.

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

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

1. Energy Savings Assistance (ESA) Program Executive Summary

2023 Energy Savings Assistance (ESA) Program | Summary of Results and Program Highlights

ESA Main: PG&E's 2023 ESA Main (single-family, mobile homes, and multifamily in-unit) program provided 65,518 households with energy efficiency (EE) and health, comfort, and safety improvements. The ESA Main program's installed measures and associated reduced energy use in 2023 was 28,694,608 kilowatt hours (kWh) and 1,276,687 therms – the equivalent offset of an estimated 29,543 tons of greenhouse gas (GHG) emissions. In addition to energy use reduction, households treated by the ESA Main program also received, on average, an estimated lifetime bill savings benefit of $1,155.

In 2023, ESA Main spent an average of $1,650 in measure costs per home, to achieve an average lifetime bill savings benefit of $1,155 and average annual 438 kWh savings; compared to 2022, where ESA Main spent an average of $1,431 in measures per home to achieve a lifetime bill savings benefit of $863 and average annual kWh savings of 364 kWh. These results from the first half of the program cycle indicate that program year (PY) 2023 delivered deeper energy savings and cost savings to customers than PY 2022, but at a higher measure spend. In both PYs, the investment in measure costs was higher than the amount customers can expect to save on their energy bills for the lifetime of the measures.

PG&E was able to offset some of the increased measure spend in 2023 by reducing its administrative spend by 26% from PY 2023 to PY 2022, primarily due to increasing efficiency and streamlining processes – the administrative spend reduction occurred while PG&E maintained a similar level of home treatments in ESA Main, as well as launched Multifamily Whole Building (MFWB) and ramped up Pilot Plus/Pilot Deep (PP/PD). The overall bill savings/cost ratio improved from 2022 to 2023, and the ESA Cost-Effectiveness Test (ESACET) also increased from 0.69 in 2022 to 0.82 in 2023, exceeding the 0.70 target. While these initial observations from the first two full years of the new program design are helpful in indicating performance, the program will need to progress further and collect more data in order to make year over year comparisons and draw more robust conclusions.

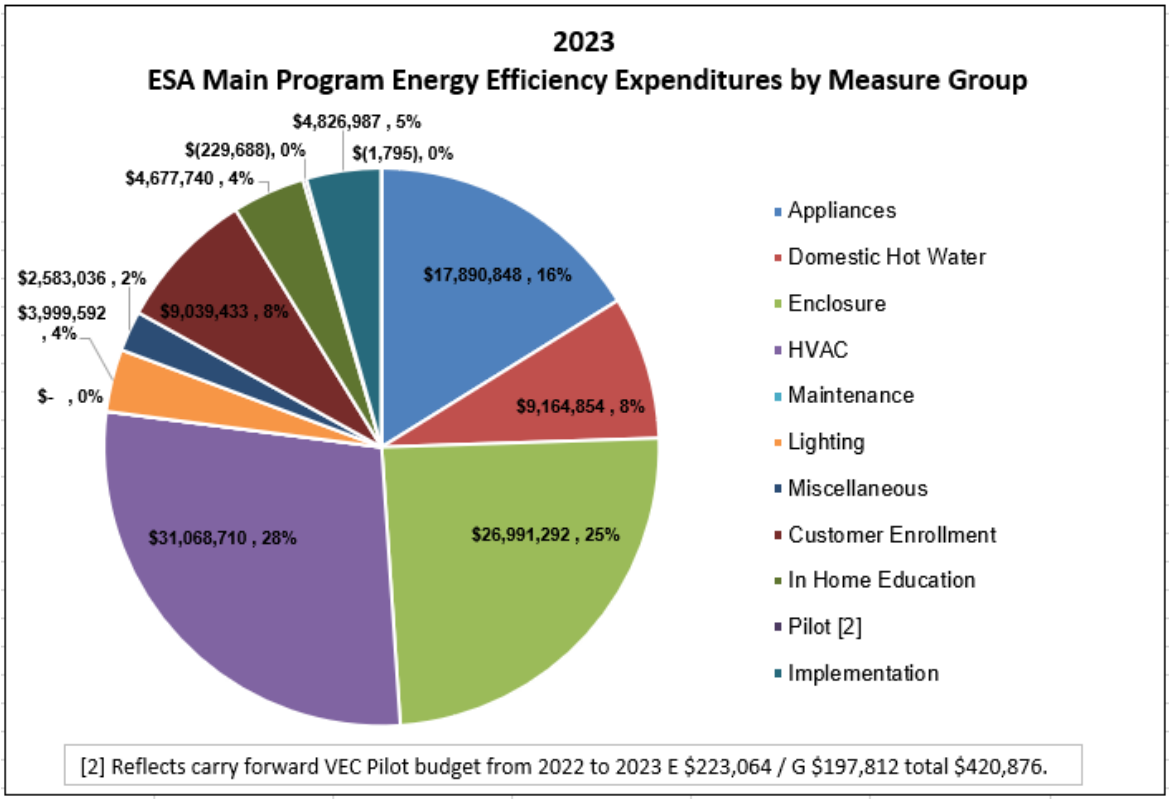
Pilot Plus/ Pilot Deep: In addition, the ESA PP/PD (or Pilot) program completed its first full year of implementation with a focus on increasing capacity and completing projects that meet the energy savings goals envisioned for the Pilot. Through 2023, the PP/PD program approved and initiated 131 projects with a total of 56 completing treatments. For the 31 projects completed in PY 2023, the average measure cost was $10,522 per home, for an estimated customer lifetime bill savings of $3,923 and average annual kWh savings of 773 kWh. PG&E anticipates the per home measure investment cost, along with the additional administrative costs, may likely decline as the Pilot completes more projects and achieves greater efficiencies of scale.

Multifamily Whole Building Program: In June 2023, after successfully completing a competitive solicitation for a program implementer, PG&E launched its Northern Multifamily Whole Building (N. MFWB) program (part of the ESA portfolio serving multifamily properties). Outreach, site assessments, and in-home treatments began shortly after program launch, and PY 2023 produced 3,468 in-unit treatments with 499,590 kWh, 60 kilowatts (kW) and 36,319 therms savings. The program also enrolled 140 and audited 47 multifamily (MF) properties. In addition, a waitlist from the ESA

Multifamily (MF) Common Area Measures (CAM) program was transferred to the new program.

ESA Program Summary Table 1 provides a summary of PY 2023 ESA program EE expenditures by measure group. Additional details on PG&E's ESA program, including ESA Main, N. MFWB, and PP/PD are included in Section 1.1.1 of this report.

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



The ESA program's noteworthy marketing, outreach, and administrative achievements in 2023 included:

- ESA Main exceeded annual homes treated goals (108%) and exceeded or nearly exceeded the PY 2023 portfolio energy savings goals (208% kW, 80% kWh, 88% Therms), as detailed in Table 1.1.1.1.
- Continued data-driven targeting and segmentation to market program and identify highest needs states and households with high energy savings potential.
- ESA Main's Marketing, Education, and Outreach (ME&O) initiatives generated more than 94,000 program applications for ESA contractors, exceeding the internal application goal of 60,000 by 57%.
- Increased ESA Tribal Outreach Grants' scope and reach, and modified operations to include customers who self-identify as tribal, resulting in increased ESA tribal treatments from two households in 2022 to 246 tribal homes treated in 2023.
- Leveraged the ESA Working Group's (WG) measure modification protocol to modify multiple measures and better optimize the ESA portfolio with stakeholder engagement and approval, in order improve savings outcomes and cost-effectiveness.

- Achieved estimated energy savings in compliance with Pilot Plus (PP) and Pilot Deep (PD) targets, (11% PP with 31 completed projects and 21% PD with 25 completed projects) while ramping up both Pilots and documenting learnings from outreach, marketing, and project installations.
- Implemented the new N. MFWB program in June 2023. Enrolled 140 properties and audited 47 whole building projects by the end of the PY.

ESA Program Activities Supporting Environmental and Social Justice (ESJ)

Initially approved February 21, 2019, and updated in a 2.0 version in 2022, the Commission's Environmental and Social Justice (ESJ) Action Plan[2] provides a roadmap and directive for utility programs to prioritize and improve services to residents of Disadvantaged Communities (DAC), tribes, communities of color and low-income communities. In 2023, PG&E's ESA program incorporated and advanced the goals of the ESJ Action Plan in multiple ways, including:

- Developing WGs and sub-working groups (SWG) in the ESA WG to provide an opportunity for community voices and perspectives to be considered.
- Prioritizing tribal participation in ESA and revamping the Tribal Outreach Grant program in response to tribal input, such as by increasing the grant amount and timeline.
- Utilizing the annual public meeting as a forum to engage broad stakeholders on program outcomes, planning, and improvement opportunities.
- Prioritizing customer segments and improving data collection to better report impact and outcomes, such as for vulnerable communities, households with high energy burdens, households in DACs, California Air Resources Board (CARB) communities, etc.[3]
- Tracking and reporting on Disadvantaged Workers in the ESA workforce.
- Designing the PP/PD programs to reach DACs and areas of high need in the Central Valley.

Procedural Background

The PG&E ESA program uses a prescriptive, direct install approach to provide free home weatherization, EE appliances and energy education to income-qualified customers throughout PG&E's service area. PG&E customers living in single-family (SF), MF, and mobile homes (MH), including homeowners and renters, are eligible to participate.[4]

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[2] CPUC Environmental and Social Justice Action Plan (February 21, 2019) Retrievable at https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M263/K673/263673090.pdf (last accessed on April 26, 2024); 2.0 version released March 2022. Retrievable at https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M465/K846/465846599.pdf (last accessed on April 26, 2024)

[3] ESA Table 17, ESA Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions in this Report's Appendix A further defines these customer segments.

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

1.1. Energy Savings Assistance (ESA) Program Overview

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

The Commission, in Decision (D.) 21-06-015 (approved June 3, 2021), authorized a new ESA, CARE, and FERA program funding cycle beginning July 1, 2021 through December 31, 2026. PG&E's overall program cycle budget is approximately $972.06 million (M) for ESA (including ESA Main, MFWB, and PP/PD programs). The Commission also made homes treated a target rather than a goal beginning in 2022, approved the Energy Division's (ED) proposed ESA program concept on a pilot basis (i.e., the ESA PP/PD program) to commence in 2022, and established a new ESA MFWB program that commenced in 2023.[5]

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

- Shifting the program towards customer-centered prioritization model, treating households based on need and customer characteristics.
- Ease of introducing new measures for the program that focus on deeper energy savings, while allowing the Investor-Owned Utilities (IOU) flexibility in managing the portfolio by updating the measure mixes through engagement with the ESA WG and monthly reports.
- Allowing for customer self-certification to receive treatment of basic measures without income qualification or a waiver of property owner forms.
- Establishing cost-effectiveness guidelines.
- Establishing a new MFWB program (N. MFWB) that launched in 2023.
- Establishing an ESA WG to continuously monitor program progress and make recommendations.
- Approving the ED's ESA program redesign concept on a pilot basis (PP).
- Requiring the IOUs to establish effective coordination efforts among low income and clean energy programs.
- Directing research into the development of a Universal Application System (UAS).
- Managing impacts to ratepayers' bills by using unspent funds to offset revenue collection and avoid large accumulations of unspent funds balances.

ESA Main Program

ESA Main Program Summary Table 1.1.1.1 compares PY 2023 authorized budgets and targets to PY 2023 actuals and achievements.

[5] D.21-06-015.

ESA Table 1.1.1.1 PY 2023 ESA Main Program Summary			
	2023 Authorized/ Forecasted Planning Assumptions	**2023 Actual**	**%[b]**
January 1-December 31, 2023			
Budget [a]	$127,740,559	$119,876,124	94%
Administrative Budget [a]	$14,750,395	$9,865,114	67%
Total Homes Treated	60,437	65,518	108%
kWh Saved[b]	35,773,079	28,694,608	80%
kW Demand Reduced[b]	3,238	6,738	208%
Therms Saved	1,458,655	1,276,687	88%
GHG Emissions Reduced (Tons)	-	29,543	-

[a] D.21-06-015, Attachment 1, Table 8. Detailed information can be found in Appendix A of this report: ESA Table 1 -ESA Main (SF, MH, MF In-Unit) Overall Program Expenses.
[b] Per Table 5 of Attachment 1, D.21-06-015, the 2023 energy savings goals for kWh, kW, and therms include ESA Main, MF CAM and MFWB; however, the above table reports results only from ESA Main, and does not include results from MF CAM or MFWB.

In addition to the primary achievements detailed in this report's Executive Summary, including that the ESA Main program exceeded its households treated goals (108% attainment) and exceeded or nearly met the PY 2023 energy savings goals (208% attainment kW, 80% attainment kWh, 88% attainment therms).[6]

PG&E provides additional PY 2023 highlights and detail for the ESA Main program below:

- Utilized the ESA WG to approve five new measures and retire two measures, further optimizing the measure offerings for cost-effectiveness and customer savings impact (as further detailed in Section 1.2.4).
- Implemented Lean operating principles[7] and real-time visual management and data reporting with ESA Main program implementers and contractors to improve performance and early escalation of deviations from plan, which were mitigated through simple problem-solving tools.
- Focused on customer satisfaction surveys across contractors and subcontractors to identify pain points or opportunity areas in the customer journey, resulting in an overall customer satisfaction score for PY 2023 of 83%, meaning that 83% of respondents described their ESA program experience as "excellent" or "very good."
- Implemented a "bill fail" initiative to increase the accuracy of contractor and subcontractor billing and invoicing, focusing on efficiency gains.

[6] Per Table 5 of Attachment 1, D.21-06-015, the 2023 energy savings goals for kWh, kW, and therms include ESA Main, MF CAM and MFWB; however, these percentages of progress to goal considers results only from ESA Main, and does not include results from MFCAM or MFWB. In 2023, MF CAM was sunset and contributed zero energy savings; MFWB was launched in June 2023 and the energy savings contributed from in-unit projects was negligible. For these reasons, PG&E only includes 2023 ESA Main results against its overall PY portfolio goal.

[7] PG&E adopted a Lean Operating System and management structure in 2021, which is a data-driven, operational system designed to drive effective and responsive decision-making.

PG&E's MF CAM program was sunset in PY 2022, and any new projects that would have been treated in MF CAM were able to apply for the new N. MFWB program in 2023. PG&E managed a waitlist of projects that expressed interest in participating in the N. MFWB program and transferred the list to the N. MFWB program implementer after the new program launched in June 2023.

ESA Table 1.1.1.2 2023 ESA MF CAM Program Summary			
	2023 Authorized Budget/ Forecasted Planning Assumptions	**2023 Actual**	**%**
Budget[a]	$38,764,717	$413,569	1%
Administrative Budget	N/A	N/A	N/A
Properties Treated	N/A	0	N/A
Buildings Treated	N/A	0	N/A
kWh Saved	N/A	0	N/A
kW Demand Reduced	N/A	0	N/A
Therms Saved	N/A	0	N/A
GHG Emissions Reduced (Tons)	N/A	0	N/A
[a] D.21-06-015, Attachment 1, Table 8.			

Northern Multifamily Whole Building (N. MFWB) Program

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

The resulting N. MFWB program—which was implemented and launched in June 2023 by TRC, a non-utility third-party—provides whole-building upgrades, including resident units and common areas, to income-qualified properties. The N. MFWB program design complies with D.21-06-015,[8] cost-effectiveness guidelines, and the ESA program portfolio goals to achieve deep savings. It also seeks opportunities to maximize "a building's demand response (DR) technologies, GHG reduction, water energy nexus, and the health, comfort, and safety of tenants".[9]

The N. MFWB program is accessible to both deed-restricted and non-deed restricted properties and features single point of contact (SPOC) service that connects MF property owners and tenants with incentive-layering opportunities and resources to lower the barriers to participation.

[8] D.21-06-015, pp. 500-511.

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

ESA Table 1.1.1.3 2023 ESA N. MFWB Program Summary			
	2023 Authorized Budget/Forecasted Planning Assumptions	**2023 Actual**	**%**
Budget [a]	$36,493,866	$8,007,015	22%
Administrative Budget [a]	N/A	N/A	N/A
Properties Treated	30	0	0%
Households Treated	13,566	3,468	26%
kWh Saved	3,794,344	499,498	13%
kW Demand Reduced	N/A	60	N/A
Therms Saved	253,022	36,303	14%
GHG Emissions Reduced (Tons)	N/A	19,656	N/A
[a] D.21-06-015, Attachment 1, Table 8. MFWB program budget includes In-Unit (after May 2023), CAM and WB, SPOC, CSD Leveraging, and Implementer administrative budget categories as shown in Appendix A of this report: ESA Table 1A - Program Expenses Summary.			

As seen in Table 1.1.1.3, PG&E's N. MFWB program treated 3,468 in-units with 499,498 kWh and 36,303 therms savings.[10] The program enrolled 140 properties and audited 47 whole building projects in 2023.

PG&E successfully launched the N. MFWB program and began in-unit treatment within four months after the Tier 2 Advice Letter (AL) was approved. PG&E's notable milestones in 2023 are as follows:

- Approval of the Tier 2 AL to begin implementation for the N. MFWB program in late February 2023.
- Hosted a public webinar to announce the approval of the program and share the program implementation plan in March 2023.
- Soft launch of the N. MFWB program website in June 2023 and commenced in-unit enrollments and treatments.
- Finalized the program handbook and documents, and full launch of the N. MFWB program in July 2023.

PG&E was proactive in collaborating with external program partners to identify leveraging opportunities that streamlined cross-program referrals and reduce measure costs for MFWB program participants, thereby making the program more attractive to property owners. These efforts include:

- Partnered with the California Department of Community Services and Development (CSD) Low-Income Weatherization Program (LIWP) to identify a pilot project to leverage LIWP incentive to enable deeper EE and electrification project scope.
- Established and updated project referral/leveraging process with Solar on Multifamily Affordable Housing (SOMAH) to encourage cross-program participation.

[10] All energy savings from MF in-units enrolled after June 1, 2023 were attributed to MFWB; energy savings from MF in-unit projects enrolled before June 1, 2023 are counted in the 2023 ESA Main program's energy savings.

- Newsletter and marketing collaboration with the TECH program to promote TECH electrification and heat pump incentives to N. MFWB participants.
- Collaborated with Bay Area Regional Energy Network (BayREN) Bay Area Multifamily Building Enhancements (BAMBE) team to identify opportunities for future leveraging and referral efforts.
- Leveraged local water district program offerings for MF in-unit projects.

Some selected achievements, highlights and lessons learned for 2023 N. MFWB include:

- Completed MFWB Installation Standard (IS) Manual and Policy and Procedure(P&P) updates.
- Maintained a waitlist from the CAM program to keep interested customers engaged and informed on the new program launch.
- Conducted market assessment to pre-identify MF properties and their associated tenant units and customer segments.
- Established the Res-Intel MF Property dashboard to help inform target marketing and outreach efforts.
- Updated MFWB monthly reporting template and began reporting MF customer segmentation data.

N. MFWB program participants were connected with PG&E's SPOC referral program for program leveraging opportunities available including other EE financing and incentive programs offered by IOUs, Community Choice Aggregators (CCA), RENs, and air quality management and water districts.

In 2023, PG&E's SPOC tracked over 59 MF-serving programs throughout California and referred 399 customers to 46 different programs. PG&E also launched a SPOC web tool to refer customers to the eligible program for their property using their zip code. To date, the web tool has made 152 referrals to other programs. N. MFWB and PG&E's SPOC worked collaboratively to provide customers with a scope of work leveraging services to maximize energy savings potential.

Southern Multifamily Whole Building (MFWB) Program

PG&E did not participate in the Southern MFWB program.

ESA Table 1.1.1.4 2023 ESA Southern MFWB Program Aggregate Summary			
	2023 Authorized Budget/Forecasted Planning Assumptions	**2023 Actual**	**%**
Budget	N/A	N/A	N/A
Administrative Budget [a]	N/A	N/A	N/A
Properties Treated	N/A	N/A	N/A
Tenant Units within Properties Treated	N/A	N/A	N/A
kWh Saved	N/A	N/A	N/A
kW Demand Reduced	N/A	N/A	N/A
Therms Saved	N/A	N/A	N/A
GHG Emissions Reduced (Tons)	N/A	N/A	N/A
[a] Implementation to occur no earlier than January 2023.			

ESA Pilot Plus and Pilot Deep Program

ESA PP/PD is a pilot focused on achieving deep energy savings per home treated, through a combination of traditional and novel ESA interventions. D.21-06-015 approved the Pilot to begin implementation in 2022 with two treatment tiers: the "Pilot Plus" tier, which is intended to achieve five to 15% energy savings per household, and the "Pilot Deep" tier, which is intended to achieve 15% to 50% energy savings per household.[11] The measure packages will be comprised of both basic measures found in the ESA Main program, as well as more advanced measures unique to the Pilot.

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

- Innovations in measure delivery and customer journey.
- Greater investment per home to address stranded savings.
- Greater energy savings and bill impacts per home.
- Electrification.[12]

The Pilot also offers an opportunity to better understand the long-term benefits of more extensive treatments (including non-energy benefits), and the cost-effectiveness of the interventions.[13] The Pilot is planned to operate through 2026.

To drive innovation and improve cost-effectiveness, PG&E opted to conduct a competitive solicitation for the design and implementation of the Pilot. PG&E launched the Pilot at the end of June 2022, with a fully executed third-party pilot implementation contract.[14] Outreach, assessments, and installations began in Q4 2022.

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

[12] Ibid, p.1.

[13] Ibid, p.1.

[14] D.21-06-015 Ordering Paragraph (OP) 42 states "The Pilot Plus and Pilot Deep program must be launched by the beginning of the third quarter of 2022" (p. 480). PG&E in its Pilot Implementation Plan Advice letter defined program launch as beginning with an executed contract. See PG&E Advice Letter 4530-G/6412-E (November 19, 2021), p.4, fn.11 available at https://www.pge.com/tariffs/assets/pdf/adviceletter/ELEC_6412-E.pdf (Last accessed on April 26,2024)

2023 represented the first full year of Pilot implementation and focused on ramping up to increased capacity. As such, expenditures in 2022 and 2023 were below authorized budgets (the authorized budget cited in Table 1.1.1.5 includes unspent funds shifted into 2023). Throughout 2023, PG&E utilized approximately 25% of the total budget. This was anticipated, given the time necessary to ramp up to full capacity. In compliance with D.21-06-015, PG&E intends to shift unspent funds into future PYs to support Pilot growth.[15]

The first successful Pilot home treatment was completed in February 2023. Throughout 2023, 131 installation projects were scoped, approved and initiated. A subset of projects, 56 total, were fully completed by year's end.[16] Of the completed projects, PG&E estimates energy savings of approximately 14% per household; when broken down by Pilot tier, PG&E estimates savings of 11% for PP (31 completed projects) and 21% for PD (25 completed projects).[17]

Details regarding the distinguishing pilot design elements are included in Section 1.9.1.1.

ESA Table 1.1.1.5
2023 ESA Pilot Plus and Pilot Deep Program Summary

	2023 Authorized Budget/ Forecasted Planning Assumptions [c]	2023 Actual [d]	%
Budget [a],[b]	$16,624,146	$4,125,896	25%
Homes Treated	-	56	-
kWh Saved (Plus = 5-15%)	-	23,968	-
kWh Saved (Deep = 15-50%)	-	25,624	-
kW Demand Reduced	-	56	-
Therms Saved (Plus = 5-15%)	-	1,915	-
Therms Saved (Deep = 15-50%)	-	2,881	-
GHG Emissions Reduced (Tons)	-	66	-

[a] D.21-06-015, Attachment 1, Table 8 details the authorized budget for the Pilot. The Decision also authorizes fund shifting between years within the Pilot. Unspent funds from 2022 were shifted into 2023.
[b] Actual expense for 2023 includes a combination of paid expenses and accrued expenses.
[c] Home treatment, kW demand reduction, and GHG emissions reduction targets were not included in D.21-06-015. PG&E will report on actual achievements upon completion of home treatment.
[d] Energy savings are reported based on best available information at the time. Pre- and post-installation savings are derived from energy modeling software. The energy modeling software estimates savings within +/- 10% certainty. PG&E intends to report the lower value in this range as interim savings until meter-based savings estimates are reportable (typically 12 months post installation).

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

The Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Homes (MASH) programs both sunset in PG&E's service territory at the end of 2021, pursuant to Assembly Bill (AB) 217 (Bradford, 2013). As directed by D.15-01-027 that implemented AB 217, any unencumbered SASH/MASH program funds at the end of 2021

[15] D.21-06-015, OP 181, p. 520.

[16] Households treated and savings will be reported when projects have been fully closed (i.e., inspected, issues resolved, permits closed, as applicable) and reported by Pilot Implementer to PG&E.

[17] The energy modeling software estimates savings within +/- 10% certainty. PG&E intends to report the lower value in this range as interim savings until meter-based savings estimates are reportable.

should be used for EE measures in low-income residential housing, as defined.[18] On September 20, 2023, Southern California Edison (SCE) and PG&E jointly submitted an AL to recover IOUs administrative costs for SASH/MASH, transfer unspent funds from the SASH and/or MASH programs to the ESA program, and dispose of the remaining funds in the IOUs' CSI Balancing Accounts. In the AL, PG&E described the $9,566,416 left in its SASH and MASH Administrative and Incentive Program Funds and proposed transferring these funds to its ESA Core Balancing Account.[19] The AL was disposed by the ED and became effective on October 20, 2023. In October 2023, PG&E transferred $9,566,416 into its ESA Core Balancing Account.

ESA Table 1.1.1.6
2023 Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Unspent Funds (Electric IOUs Only) [a]

	2023 Authorized Budget	2023 Actual	%
Budget	$9,566,416	N/A	N/A

[a] PG&E AL 7028-E was disposed and effective on October 20, 2023 as described in text above ESA Table 1.1.1.6.

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

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

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

Using the 2023 geographic area list of ESA-eligible customers, PG&E broke out ZIP+2 areas eligible for "self-certification" enrollment.

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

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

[19] The transferred SASH and MASH funds will be used to primarily support the ESA Main program implementation across the current program cycle. However, PG&E and SCE seek flexibility to utilize the SASH and MASH funds across ESA categories, and for other ESA programs and pilots (e.g., MFWB and PP/PD). This preserves the flexibility to use the funds as program needs change.

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

Customer Targeting

PP/PD [20] will implement new approaches to customer targeting. This Pilot builds upon efforts started within PG&E's ESA Main program (i.e. utilizing customer characteristics to determine need state, and propensity to participate), and additionally incorporates energy usage analysis as an aspect of customer targeting. The intent is to determine if advanced energy usage analytics yield predictable results (particularly regarding customer depth of realized savings), and if so, how usage analytics can be used in combination with customer characteristics to support the ESA portfolio in the future.

Multiple approaches were implemented in 2023, driven by both targeting methodology and operational needs. Regarding targeting methodology, the Pilot approach evolved from high-level screening in the first quarter (Q1) of 2023 and prior, which relied more heavily on screening out customers who did not meet the Pilot's initial need state, property, or energy usage thresholds. These criteria included:

Initial Pilot Screening Criteria:

- Geographic parameters included Climate Zones 11 and 12 (northern Central Valley) as these are regions with substantial heating and cooling demand.
- Customers with dual-fuel PG&E service (gas and electric) were prioritized to maximize the potential household savings and enable PG&E to implement all feasible measures (i.e. without the need to partner with another utility).
- SF detached homes were prioritized given the new ESA MFWB program is expected to implement novel approaches within the MF segment.
- PG&E prioritized customers likely to be income-qualified, relying on a combination of income data (where available) and CARE/FERA enrollment.
- The targeting criteria included data sufficiency as well: ensuring customers had at least 12 full months of service with PG&E, to enable building a 12-month pre-treatment baseline for energy savings estimates.
- Customers who had participated in ESA within the past two years were removed, given these customers had recently benefitted from home treatment.
- The Pilot Implementer and its analytics partner then ranked remaining customers by energy usage, and populated Q1 2023 campaigns in rank order.

In preparation for the second quarter (Q2) of 2023 campaign, PG&E and its partners developed a multifaceted targeting process, incorporating more sophisticated screening on customer need state, property features, and propensity to participate, and adopting an energy usage savings propensity score to rank prospective participants.

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

Adjusted Pilot Screening Criteria:

- All initial screening criteria, with the exception that the recent ESA participation history was reduced to 12 months (from 24 months), and customers with existing referrals to the ESA program were removed.
- Generated ESA propensity scores for each prospective participant.
- Computed energy consumption features from energy usage history, utilizing its Interval Data Analysis Tool (IDAT).[21]
- Generated energy use intensity (EUI) based on available property features (e.g. square footage) and consumption features.
- Developed a savings propensity score based primarily on EUI and summer cooling and winter heating profiles (based on IDAT data).
- Applied a composite score based on propensity and savings potential.

In 2023, PG&E and its partners began evaluation of the efficacy of the new targeting approach, but are awaiting additional project completions to ultimately draw conclusions about how well the targeting approach identifies eligible customers with high energy savings potential. In December 2023, PG&E and its partners began work on an incremental expansion of savings potential score and composite score criteria, with plans to adopt for the first campaign in 2024.

Starting with the Q2 2023 campaign, PG&E and its partners incorporated best practices to ensure the results of the targeting effort can be evaluated empirically and plans to continue to do so throughout subsequent iterations of the targeting approach.

Operational Improvements

Several operational lessons were learned following each quarterly campaign in 2023, and improvements applied to subsequent campaigns, as detailed below:[22]

1. **Aligning the Pilot's targeting process with ESA Main's targeting and data set resulted in administrative efficiencies.**
   During the Q1 campaign, customer characteristics such as financial need state (based on available income, CARE or FERA indicators) and housing type were extracted in one dataset, along with energy usage consumption data. Where available, propensity data were later applied to the Q1 campaign. Conversely, by the beginning of the Q2 campaign, PG&E aligned the targeting process to coincide with and utilize in part the ESA Main program's targeting process. As a result, PG&E generated both ESA Main and Pilot campaigns from a single data set, with the Pilot campaign additionally incorporating an energy savings propensity score. Aligning the targeting process between ESA Main and the Pilot resulted in administrative efficiencies in both time and cost.

[21] IDAT enables targeting by producing a series of energy usage consumption features that indicate potential success in load management programs. Additional information about IDAT is provided in Section 1.9.1.

[22] Pilot campaigns were conducted on an ongoing basis throughout Q1 2023. Campaigns took place in quarterly batches in Q2 2023 and Q3 2023. No new campaigns were launched in Q4 2023.

2. **PG&E conducted direct-to-customer marketing, and observed a higher response rate than when the Pilot implementer performed those duties.**
   In Q2, PG&E assumed responsibility for deploying email and direct mail campaigns (whereas the Pilot Implementer had done so throughout 2022 and Q1 2023). The change proved successful, yielding an initial customer response rate of approximately 16%, compared to approximately 1% in prior Pilot campaigns. The Q2 campaign also shifted marketing materials to more closely align with traditional ESA branding, which indicates customers are more likely to respond when the program name and/or entity are fairly well known by customers within the target segment.[23]

3. **Smaller, more frequent marketing campaigns are optimal for a small operation, such as this Pilot, where resources are limited.**
   The Q2 campaign yielded a much higher response rate than had been planned. Benchmarks of similar efforts by PG&E ranged from 5-12%, whereas the Q2 campaign resulted in approximately 16%.[24] As a result, the Pilot had more customer referrals to process than had been expected based on the benchmarking effort. Given the Pilot Implementer was relatively early in its operational ramp-up, several solutions were deployed to ensure timely follow-up on customer referrals. These included the Pilot Implementer temporarily securing additional cell center support, utilizing installation subcontractors with staff already trained to handle customer intake on the ESA Main program, and PG&E temporarily securing application management staff support. Together, these joint efforts allowed the Pilot to process the higher-than-expected referrals.

   To avoid the need to quickly ramp-up and ramp-down referral processing resources, the Pilot instead opted to split future campaigns into smaller batches. By the start of Q3 marketing, the email campaigns were deployed in six weekly batches. Compared to the Q2 campaign, the third quarter (Q3) campaign resulted in more steady referrals, which the Pilot Implementer was capable of processing with existing staff resources. Plans for 2024 include splitting both email and direct mail into six or more weekly batches.

4. **Offering an optional self-screening form equipped the Pilot Implementer with more information in advance to prepare an appropriate follow-up to customer responses to marketing.**
   Another opportunity identified during the Q2 campaign was the need for a standardized online screening tool. Up to that point, the Pilot Implementer's staff handled all eligibility screening through live phone calls, which typically take 30 minutes, but can vary widely. By the launch of the Q3 campaign, the Pilot implemented an optional online self-screening tool which customers can use to input information about their household and property. With this information, the Pilot implementer is able to delineate between the customers needing greater levels of support (those who did not complete the optional screening form), those needing moderate levels of support (those who meet eligibility criteria and need follow-up engagement), and those who need relatively less support from Pilot staff (those who do not qualify, and are instead referred to ESA or other programs).

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[23] The current ESA program has been operating under the "Energy Savings Assistance Program" name since 2011.

[24] The Q2 campaign resulted in a 15.8% response rate initially. The same customers were engaged again in Q3 (excluding those who already replied in Q2), driving the overall response rate for the campaign list to 26.3%.

5. **Virtual enrollment reduces unnecessary cost resulting from conducting in-person home assessments of ineligible households.**
   By the Q3 campaign, the Pilot Implementer was fully capable of conducting virtual enrollment with regard to the program forms and income/categorical documentation. Given the nature of the Pilot is to investigate opportunities for deep energy savings at each home, the home assessment is thorough. As a result, the assessment is also costly, particularly if the home does not qualify. Between the data-driven customer targeting, the optional self-screening form and the virtual enrollment process, the Pilot Implementer is able to reserve assessments for those with the highest likelihood of meeting participation requirements. Throughout 2023, the number of unsuccessful assessments decreased from approximately 50% in Q1 to approximately 25% in the fourth quarter (Q4).

6. **More projects must be completed to fully evaluate and apply learnings from the novel targeting methods implemented in the Pilot.**
   The Pilot implementation team devised a randomized controlled test to measure the efficacy of the customer targeting methods described earlier. The test was set up as a comparison between two groups: Group A contained customers targeted based on traditional ESA methods, whereas Group B contained a combination of both traditional and new Pilot-specific methods. The test was designed with the caveat that enough projects had to occur within each group to substantiate an analysis. Unfortunately, too few projects were completed within each group to yield conclusive results. The Pilot implementation team plans to re-run a similar test in 2024 once enough projects are completed.

Coordination

The Pilot is being implemented at the same time as the ESA Main program, largely relying on the same eligibility criteria. So customers are not being contacted by multiple entities working within the PG&E ESA portfolio, PG&E has coordinated marketing campaigns between the Pilot and ESA Main since the launch of the Pilot. In addition to the operational improvements explained above, the Pilot implemented iterations of improvements with ESA Main coordination throughout 2023.

Referral tracking

When campaign lists are created, PG&E creates referral records in its customer relationship management system, Energy Insight. The system contains controls that prevent a single customer from having multiple referrals at any given time. The Pilot and ESA Main explored different ways to use this system control to manage which program contacted which customer, including applying existing referral status as a screening criteria (i.e. in addition to recent program participation) and utilizing special “Pilot participant” flags to signify the customers who are prioritized for Pilot outreach. The Pilot and ESA Main programs will continue to optimize the coordination of referrals in subsequent campaigns.

Inter-program referrals

Implementers for the Pilot and ESA Main were provided sufficient information to refer customers between programs, including contact information, intake sites, and program eligibility information. Because the Pilot is implementing a specific targeting approach, there are relatively few referrals from ESA Main to the Pilot. The majority of referrals occur from the Pilot to ESA Main. These referrals occur when the Pilot encounters customers who meet ESA eligibility criteria, but whose energy savings potential do not meet minimum Pilot thresholds (i.e. 5% annual savings). PG&E implemented a system

in 2023 which allows multiple referrals to be transferred to the ESA Main program at once, typically on a weekly basis.

Call-Center Resources:
PG&E has provided its call center teams with information about the Pilot since its launch in 2022. Throughout 2023, PG&E continued to update Pilot guidance and referral instructions to ensure its call center teams are capable of fielding customer inquiries, and distinguishing among the Pilot and ESA Main.

Finally, as a means of differentiating Pilot offerings from those of the ESA Main program, the Pilot's offerings are referred to as "ESA Whole Home" (relating to the comprehensive and deep energy savings approach envisioned for the Pilot).

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

PG&E's ESA program uses a propensity model to identify and target customers who are most likely to apply for the ESA program and have their home treated. The model leverages customer attributes and behaviors, including location, language preference, rebate activities, commodity type, payment patterns, and demographics. The model creates a ranking of customers according to their likelihood, or propensity, to participate in the ESA program. The model divides the customer into ten groups or deciles. Decile 1 is the most likely to participate in ESA, decile 10 being the least likely. Each decile divides customers into a grouping of 10% of the eligible population (according to their ranking). PG&E's CARE propensity model score is also included in the ESA propensity model as, historically, engagement with other PG&E programs leads to additional customer engagement. Compared to the previous ESA model from 2021, the updated model launched in November 2022, is 51% more efficient at capturing ESA applications in the top deciles. At 10% depth, ESA model efficiency is now 23% higher than the previous model. At 15% depth, the current ESA model efficiency is 8% higher than the previous model. In 2023, Decile 1 generated the highest Application Rate in Q1. However, in Q2 and Q3, Application Rates between Deciles 1 and 2 were generally equal. Assessment and Treatment Rates were highest in Deciles 1 and 2, and generally lower in Decile 3.

2023 ESA Program | Marketing, Education and Outreach (ME&O) Tactics and Highlights

In 2023, PG&E continued to use marketing approaches and tactics that have proven successful in driving awareness and acquisition in the ESA program. PG&E has a highly engaged audience. To illustrate, PG&E's ME&O initiatives generated more than 94,000 program applications for ESA contractors, exceeding its application response rate goal of 60,000 by 57%. Overall assessment and treatment rate was 16% and 13% respectively, increasing from 9% and 7% in 2022. Due to significant leads in the pipeline and in coordination with ESA program implementers, PG&E paused direct mail and email marketing in Q4 2023.

In the following sections, PG&E details the outcomes from its approaches:

Direct Outreach
Throughout 2023, PG&E utilized proven marketing tactics to prioritize targeting customers in DACs This strategic approach led to an overall application response rate of 35% within the DAC segment and 38% within the non-DAC audience. Across both segments, there was a near 50/50 split in applications submitted via direct mail and online (digital and email). While DAC customers had a 10% lower application rate they generated a 59% higher assessment rate and 69% higher treatment rate than Non-DAC customers.

PG&E promotes ESA to customers who are newly enrolled in the CARE or FERA program through welcome materials delivered either via direct mail or email. Customers may continue to access the ESA application online by scanning a quick response (QR) code or accessing www.pge.com/esa-welcome.[25] In 2023, 21% of the CARE Welcome Kit generated applicants had their homes assessed and 18% completed their treatment.

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

Paid Media
PG&E implemented an "Always-On" digital strategy throughout PY 2023 to drive awareness, engagement, and enrollment. This strategy included search engine marketing, digital display advertising, and social media ad placements. The 2023 media strategy retargeted advertisements to income-qualified customers that had similar characteristics to existing ESA customers and drove traffic to the ESA landing page.

ESA's 2023 digital campaign exceeded campaign performance goals on all key metrics. Impressions, clicks, home page visits, and completed applications exceeded goals by double-digits, and the cost per landing page visit (CPLPV) was 50% more efficient than in 2022. In 11 out of 12 months of 2023, PG&E observed an increase in completed applications over the previous year, with December 2023 delivering four times more completed applications than December 2022.

Performance highlights include:

- The ESA campaign delivered over 171M impressions (67% above impressions goal).
- 731 thousand (k) Clicks (2.5x over the clicks campaign goal)
    - 0.43% click-thru rate (CTR), exceeded 2022's 0.29% CTR.
- 413,141 ESA home page visits were delivered (100% above visits goal).
- 16,910 completed applications (96% above campaign goal).

[25] Last accessed on April 24, 2024

PG&E Earned Media and Owned Assets
PG&E continued to deploy an income-qualified digital newsletter to approximately 1.6M customers per quarter. When a customer engaged with specific content in the digital newsletter, a trigger email with information about the ESA program was sent to over 16,000 customers, which generated a high CTR of 27%. Content focused on the needs of income-qualified renters and homeowners with medium to high energy bills with the purpose of building awareness, driving enrollment, and providing relevant energy management tips and tools.

In 2023, two new Home Energy Report (HER) versions were added to serve different audiences. PG&E used its HERs to promote the ESA program, with ESA featured in the April and September eHERs (email), and the September Electric Only and Dual Fuel pHER (printed) issue. PG&E also periodically featured the ESA program on the www.pge.com[26] homepage to increase program awareness.

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

- **KTVO Radio:** SING Tao Radio. Offers programs in both Mandarin and Cantonese. Morning talk show with an estimated listenership of approximately 182,000.
- **Skylink TV:** Chinese satellite TV network serving Los Angeles and San Francisco Bay Area. Cantonese language with a reach of 100,000.
- **KTSF TV:** Local television station serving San Francisco Bay Area. Cantonese language with a reach of 150,000.
- **KIQI Radio:** Spanish language radio serving Kern County with a reach of 25,000.
- **KLBN Radio:** Spanish language radio serving the Central Valley with a reach of 25,000.
- **KFTV Univision TV:** Spanish language television serving the Central Valley with a viewership of 50,000.
- **KXTS Radio:** Spanish language radio serving the North Coast with a reach of 25,000.

Community Events
The majority of PG&E's in-person community events promoting ESA in 2023 were orchestrated by its partner network. This outreach included activities related to the Tribal Outreach Grant, as described in Section 1.2.5 of this report.

In 2023, PG&E's Customer Service Outreach (CSO) Team attended 75 local events in PG&E's most vulnerable communities. During these local outreach events PG&E's customer service representatives (CSR) engaged customers in conversations related to the ESA program, in addition to sharing information about financial assistance and energy management program offerings.

[26] Last accessed on April 26, 2024

In addition, two community-based organization (CBO) pilots with CBOs included outreach on ESA and other supporting programs. The CBOs in the two pilots provided information on ESA, CARE/FERA and other program at community events as well as helped enroll customers into these programs, as further descried in Section 2.4.1 of this report.

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

Identification
In 2023, PG&E continued to prioritize ME&O to customers residing in DACs for the ESA program.

Outreach
In 2023, PG&E continued to prioritize targeted marketing to DAC customers.

Enrollment
PG&E continued to offer ESA enrollment and energy education in person or virtually in 2023.

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

Energy Audit/Measure Installation
PG&E received approval at the May 2023 ESA WG meeting to introduce two measures: heat pump water heater (HPWH) fuel substitution/switching and central heat pump fuel substitution/switching. Due to implementation challenges, the PG&E ESA program did not roll out those measures in 2023 and is evaluating strategies to offer these fuel-substitution measures in the future.

PG&E received approval from the ESA WG in October 2023 to introduce three measures: lifecycle refrigerant management (LRM), smart fan controller (SFC), and induction cooking appliances. PG&E received approval at the same time to retire two measures: freezers and air conditioning (A/C) tune-up (A/C tune-up is replaced by LRM). Freezer measures were not previously implemented by PG&E ESA.

PG&E plans to collaborate with ESA implementers and contractors to prepare for these new measure launches in the first half of 2024.

In addition, in 2023, the PG&E ESA program began partnering with TECH Clean California to offer full and partial electrification measures to select ESA customers via the Full & Partial Home Electrification Leveraging (Strategic Early Retirement [SER] program). This program will efficiently leverage existing ESA customer outreach to layer funding and provide heat pump heating, ventilation, and air conditioning (HVAC), HPWH, induction cooking appliances, and electric dryer appliances to interested ESA customers. Of the four potential measures and other infrastructure/remediation costs, PG&E ESA is authorized to install induction cooking appliances when it enables full home electrification. PG&E and TECH Clean California conducted planning, ramp-up, and contractor training activities in 2023. The partnership expects to begin reaching out to select customers in late February 2024.

PG&E ESA has also partnered with TECH Clean California to provide additional funding for heat pump HVAC and HPWH measure costs that exceed eligible ESA program costs. In 2023, PG&E ESA contractors utilized this funding to install three HPWH measures and will continue to utilize this funding to install heat pump measure upgrades to more eligible customers.

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

Initiatives

PG&E's efforts in 2023 started with outreach to all 62 federally recognized tribes, 40 non-federally recognized tribes, 30 Tribal Housing Authority Offices, eight Temporary Assistance for Needy Families (TANF) offices and four other state offices in its service territory. Email outreach included the following:

- Offers of webinars and/or phone call consultations along with the distribution of quarterly tribal newsletters. The newsletters provided customer assistance information, including alternate payment methods, greater access to PG&E's energy assistance programs, and ESA Tribal Outreach Grant information.
- ESA Tribal Outreach Grant announcements were sent out in December 2022 and January 2023.

As a result of the outreach mentioned above, 18 tribes and six Housing Authority Offices and TANF agencies requested a meeting/presentation about PG&E assistance programs, and nine tribes requested materials for outreach events.

The ESA outreach initiatives, coupled with an operational modification to include customers' who self-identify as tribal on the ESA enrollment form, resulted in a significant increase in tribal homes treated in ESA: two tribal homes were treated in 2022 and 246 in 2023 (as further detailed in Appendix A of this report: ESA Table 16 – ESA Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions).

ESA Tribal Outreach Grants[27]

PG&E awarded its first ESA Tribal Outreach Grant in 2022 to the Tejon Tribe, and then created forums for tribes to provide input on the grant structure, with the aim of increasing tribal participation in future years.

Based on tribal feedback received, PG&E implemented two primary changes to the 2023 Tribal Outreach Grant from 2022's Tribal Outreach Grant: an increase in funding available for each tribe, (from $5k to $30k annually) and an increase in the grant term (from 1-year grants to 2-year grants with an option to renew for a third year).

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

In May 2023, PG&E was pleased to award three Tribal Outreach Grants to the Trinidad Rancheria, North Fork Rancheria, and Ione Band of Miwok Indians. In June, Tribal Liaisons participated in training and onboarding. From July through September, the Tribal Liaison's focus was on outreach activities, including events focused on increasing tribal residents' awareness of PG&E's assistance programs, specifically the ESA program along with other complementary programs, and facilitating enrollment.

Grant-funded Activities

Tribal Liaisons distributed marketing materials (via print media or electronically, via social media and emails), coordinated the service dates, and provided critical communication to tribal members.

The ESA Tribal program information was provided to a total of 1,389 tribal residents in the events listed in Table 1.2.4.

ESA Table 1.2.4
ESA Information Distribution at Events via Outreach Grant

Event Name	Number of Participants
North Fork Annual Earth Day Event	143
Annual North Fork Rancheria Gathering	352
Council Meetings	430
Food Drives	74
Chaw' Se, Big Time Event	250
LITHC Welcoming Meeting	40
Fall Festival	100

PG&E Tribal Liaisons also provided information to Tribal members by making phone calls, revising website portals, and sending information through newsletters as listed in Table 1.2.5 below.

ESA Table 1.2.5
ESA Information Activities/Tasks

Activity	Task	Number
Phone Calls	Called all of the PG&E tribal customers who applied for PG&E assistance programs or LIHEAP to provide information about the ESA program	60 tribe members
Website Portal	Added the ESA program to the Citizens Portal	N/A
Newsletters	Email newsletter with information on ESA	816 tribe members
Case Load emails	Monthly phone calls and provided information about the ESA program	45 cases per month
One-on-one meetings	Discussed ESA, AMP and CARE Programs, including information about income eligibility	15 tribe members

In November and December 2023, PG&E Tribal Liaisons provided PG&E with a list of 54 customers who expressed interest in applying for the ESA program. The ESA Implementers started contacting the tribal members and anticipate completing enrollments and treatments in 2024.

In accordance with D.21-06-015[28], PG&E confirms that it has an up-to-date list of tribal contacts. Due to customer privacy concerns, PG&E is unable to provide an actual list of contact names as that information is not public.

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

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

Enhanced Energy Education

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

In 2023, ESA Main contractor in-home energy education included the following initiatives:

- ESA contractors inform customers about tools available for enrolling in Your Account (www.pge.com/youraccount),[29] PG&E's online portal to access energy statements, energy alerts and associated information, and ESA contractors often assist the customer with registering.
    - In 2023, ESA contractors assisted 1,164 customers with signing up for Your Account and enrolled 1,408 customers in Energy Alerts.
- ESA contractors review the customer's energy usage, and highlight rate options, payment options and bill payment assistance programs.
    - ESA contractors encourage customers to visit the Home Energy Checkup tool, an online energy audit tool that helps customers disaggregate their energy consumption into different end-use categories to receive customized energy saving tips.
    - ESA contractors review Personalized Energy Profile report with CARE-enrolled customers on customized behavioral and energy conservation tips, and rate recommendations based on the customer's energy use, load profile, and season of the year.
    - In 2023, PG&E's ESA contractors continued to promote the Percentage of Income Payment Plan (PIPP) and the Arrearage Management Plan (AMP); PG&E created a flag in the database to help ESA contractors identify qualified customers.

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

[29] Last accessed on April 26, 2024

- In addition, participants in the ESA program receive collateral leave-behinds from ESA contractors with tips for managing energy, rate plan choices, and other programs and resources that they may be qualified for, both administered by PG&E and by third parties.
    - PG&E's Universal Brochure provides comprehensive information to ESA customers about bill discount and assistance programs, rate plan choices, energy management and payment support programs in an easy-to-read format.
- As reported in more detail in ESA Table 2, 2023 costs for in-home education exceeded $5.1M.

Smart Thermostats
In 2023, PG&E installed nearly 15,000 smart thermostats which could be used to participate in PG&E's bring your own device automated Smart Air Conditioning (AC) DR program. Of the smart thermostats that were installed by ESA, 943 customers opted to enroll in PG&E's Smart AC program.

Load Disaggregation Reports
ESA contractors continued to use these reports as part of their in-home ESA energy education activities. PG&E continued to work with the third-party load disaggregation vendor to update 919,676 reports in 2023.

Home Energy Reports (HERs)
PG&E used its HERs to promote ESA and other income-qualified programs for applicable audiences. In 2023, 3.2M customers received HERs. Of them, nearly 1M were income-qualified customers enrolled in the CARE program and 23k were enrolled in the FERA program.

Building Benchmarking Portal
PG&E encourages its income-qualified MF property owners to benchmark their properties using PG&E's building benchmarking portal, which uses PG&E's smart meter data to provide building owners and managers insights into how to save energy and reduce their operating costs. In 2023, PG&E's MFWB program launched in July to replace the MFCAM and did not benchmark any MF properties in Energy Star Portfolio Manager (ESPM) for participating income-qualified MF property owners. PG&E's SPOC program provided benchmarking service to two properties.

1.2.7. Managing Energy Use

Section 1.2.6 details the tools and resources provided and available to customers to assist in managing their energy use.

1.2.8. Services to Reduce Energy Bill

Section 1.2.6 includes a description of services that ESA contractors provide to customers to help reduce energy costs. In addition, the ESA program also has cross-referral and direct enrollment processes to auto-enroll eligible income-qualified customers into either the CARE or FERA program, as appropriate, per the income eligibility guidelines.

1.3. ESA Program Customer Enrollment

1.3.1. Report the number of customers or households treated, the IOU specific 2023 household treatment target, and the percentage of households treated. If the IOU was not able to reach the total household target, please explain.

In 2023, ESA treated 65,518 households, with a PY target of 60,437, totaling 108% of households treated for the ESA portfolio, including ESA Main and MF In-unit, and excluding MFWB and PP/PD. PG&E exceeded the total households treated target in 2023.

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

In 2023, PG&E's ESA program contractors continued to streamline customer enrollment strategies by incorporating categorical eligibility, self-certification, and virtual enrollment into ESA program processes, per program policies. Initiatives in PY 2023 built upon the foundation established in prior PYs. While there were no major substantive changes in 2023, PG&E details its current streamlining efforts below.

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

Self-Certification
PG&E encouraged contractors to work in the 80% self-certification areas by providing them with breakdowns of estimated eligible customers by ZIP+2 to use in their customer recruitment activities. In 2023, PG&E treated 3,841 homes in these targeted self-certification ZIP Codes.

PG&E continued to fulfill its commitment to the CPUC's expanded ESA self-certification requirements in counties impacted by the California wildfires, winter storms, and wind events. Customers residing in these impacted counties could self-certify for ESA if they lost income documents in these events. In 2023, PG&E treated 574 homes in this self-certification category.

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

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

The ESA Main program exceeded the kW goal (208% attainment) but fell slightly short on the kWh goal (80% attainment) and therms goal (88% attainment) for 2023's PY goals, as shown in Appendix A of this report: ESA Table 2 - ESA Main Expenses and Energy Savings by Measures Installed and highlighted in ESA Main Table 1.1.1.1.[30] The primary reason ESA did not meet or exceed the kWh and therms goals is due to the slower-than-anticipated ramp up and implementation of the N. MFWB program.

2023 ESA Program Modifications

Beyond the measure modifications described in Section 1.2.4, there were no substantive modifications to program operations in 2023.

1.4. Disability Enrollment Efforts

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

Customers with disabilities are estimated to make up 28% of the ESA program enrollees in 2023, exceeding the 15% enrollment goal. Because ESA contractors are not authorized to ask households about occupants with disabilities, households were counted and recorded by ESA contractors based on visual observations or unsolicited comments by occupants. Thus, participation of households with occupants who have disabilities may actually be higher than recorded.

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

PG&E's ESA program delivery takes the needs of persons with disabilities into account by providing specialty measure enhancements to ESA customers with disabilities. For example, side-by-side and bottom-mount refrigerators are available to customers with disabilities. In 2023, ESA installed 726 of these special-order refrigerators.

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

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[30] Per Table 5 of Attachment 1, D.21-06-015, the 2023 energy savings goals for kWh, kW, and therms include ESA Main, MF CAM and MFWB; however, these percentages of progress to goal considers results only from ESA Main, and does not include results from MFCAM or MFWB. In 2023, MF CAM was sunset and contributed zero energy savings; MFWB was launched in June 2023 and the energy savings contributed from in-unit projects was negligible. For these reasons, PG&E only includes 2023 ESA Main results against its overall PY portfolio goal.

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

ESA Table 1.4.3 2023 Disability Enrollments			
Source	**Total Enrollments**	**Disability Enrollments**	**% of Disability Enrollment**
Various contractor recruiting and sign-ups			
Total Enrollment Rate	**65,518**	**18,071**	**28%**

PG&E's outreach strategy includes collaboration with strategic community partners to provide energy education as well as facilitate enrollment in the ESA program. In 2023, PG&E contracted with 13 CBOs to provide ME&O to customers on various assistance and bill savings programs, including ESA, as further detailed in Section 2.4.1 of this report.

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

In 2023, disabled community participation in ESA was an estimated 28%.

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

In 2023, ESA contractors referred approximately 3,503 customers to the LIHEAP program. For the estimated savings from ESA's water agency leveraging initiative, see Section 1.5.4 of this report. Specific results of 2023 leveraging activities are shown in Appendix A of this report: ESA Table 13A - ESA Leveraging and Integration.

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

PG&E's newly stood up MFWB program now includes the ability for non-deed restricted properties to apply. These landlords are currently ineligible to participate in CSD's LIWP. As a result, PG&E has reached out to CSD LIWP to facilitate leveraging of MFWB projects, and the LIWP program has already referred one non-deed restricted property to the MFWB program for treatment.

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

PG&E has not tracked other leveraging benefits outside of those captured under the three following criteria: dollars saved, energy savings/benefits, and enrollment increases. These are shown in Appendix A of this report: ESA Table 13A – ESA Leveraging and Integration.

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

Low-Income Home Energy Assistance Program (LIHEAP) Refrigerator Leveraging
In 2023, PG&E did not have any refrigerators installed through the refrigerator leveraging program. Based on feedback received from subcontractors in 2022 that reimbursement amounts may be too low to be workable, PG&E adjusted the reimbursement amounts for refrigerators for its primary implementers in 2023.

Low Income Weatherization Program (LIWP) – Multifamily Whole Building (MFWB) Coordination[31]
PG&E held one conference call with the CSD and the Association for Energy Affordability (AEA – CSD's implementer) in 2023 to discuss and exchange information on the CSD LIWP – ESA leveraging program. PG&E and CSD were unsuccessful in leveraging a project as LIWIP projects are primarily focused on GHG savings and electrification. PG&E did not offer electrification in PY 2023 through its ESA program which made leveraging projects a challenge. PG&E is anticipating introducing electrification measures into the portfolio mix in PY 2024 and will revisit with CSD and AEA to determine if there are any projects that can be successfully leveraged while optimizing costs.

Despite the leveraging challenges, in PY 2023, PG&E's SPOC program referred 42 projects to LIWP which resulted in nine enrollments. The LIWP program also referred one non-deed restricted property to the N. MFWB program.

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

In 2023, PG&E's Water-Energy Coordination Program (WCP) completed a fifth full year of production. The program provided water conservation assessments and measures to ESA customers in individual water agency territories. PG&E continued to partner with California American Water, City of Sacramento, Solano County Water Agency, and Valley Water.

Through the program, ESA contractors evaluated toilets using toilet dye tabs, replaced eligible toilets, conducted outdoor assessments, examined meters, performed leak detections and provided water conservation education. Customers also received conservation giveaway items such as hose nozzles and shower timers, and literature about additional water conservation opportunities. In 2023, 517 homes were served resulting in approximately 11,164,314 gallons of water savings and approximately 12,117 embedded kWh. Production in the WCP experienced a slight increase in homes served from the previous year's 507 homes, primarily due to the launch of Valley Water's pilot programs.

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

Additionally, in 2023, one of the ESA Implementers launched a new effort to develop water leveraging opportunities in the territory they serve. This included high level efforts such as:

- Conducting extensive background research on water agencies.
- Creating a survey for ESA contractors to gain insights into their water measure work experience and best practices.
- Authoring an outreach plan with supporting collateral.
- Drafting a program outline to streamline outreach activities and the implementation of the initiative.
- Engagement with water agencies to identify future partnerships

Included as Appendix C of this report: Energy-Water Coordination Program Report, are the implementers' 2023 Energy-Water Coordination Program Reports, which offers in-depth detail on partnerships, program challenges, and accomplishments.

1.6. Integration Success

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

- CARE
- FERA
- Relief for Emergency Assistance Through Community Help (REACH)
- Budget Billing
- Payment Arrangements
- Third-Party Notification (past due reminders)
- Language Preference and Support
- Medical Baseline (MBL)
- Rate Choices and Plans

As part of the collateral leave-behinds with the customers during enrollment visits, PG&E continued to distribute other brochures to help customers save money and better manage their energy bills. These materials included information on DR program enrollment, the California Wildfire program, and how to prepare for potential Public Safety Power Shutoffs (PSPS) outages.

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

In 2023, PG&E continued to promote ESA to customers who were newly enrolled in the CARE or FERA program through welcome campaign materials delivered either via direct mail or email. ESA messaging is also included within the CARE/FERA Recertification Reminder emails and the CARE monthly acquisition emails (see Section 2.4.1 of this

report). In addition, PG&E partnered with CBOs to provide outreach and enrollment in the ESA program through two ME&O Pilots, as further detailed in Section 2.4.1 of this report. PG&E also continued to automatically enroll customers who participate in ESA into CARE and/or FERA, depending on income level. In 2023, PG&E enrolled 7,277 new ESA customers into CARE and 320 new customers into FERA.

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

The primary pathway to coordinate the ESA program with the EE program is focused on MF properties via the SPOC service, which PG&E launched in 2017 to provide a single PG&E representative serving as the primary and go-to point of contact and resource for MF customers to learn about all program opportunities applicable to MF properties. In 2023, PG&E continued to expand the services SPOC offered MF customers, by increasing the number of program referral offerings and resources monitored and helping to facilitate a smooth transition from the ESA MF CAM program to the ESA MFWB program. SPOC also developed an online referral tool which allows users to locate incentive programs and other resources for MF properties by entering their zip code, with the option to filter for more accurate recommendations based on project type.

Table 1.6.2.1 summarizes the 2023 hotline calls and referral results, in which SPOC hotline calls and email inquiries increased compared to 2022, while SPOC staff made personalized referrals to slightly fewer programs compared to the year before.

ESA Table 1.6.2.1
SPOC Calls Received and Call Referrals[a]

	2017 – 2023 Count	2023 Count	2022 Count	2023 % change from 2022
SPOC Calls	992	248	197	+ 26%
SPOC MF Program Referrals	1595	399	424	-6%

[a] Calls received may result in multiple referrals.

PG&E's SPOC launched a referral tool in July 2023 on its website. At least 87 unique users used the tool a combined 387 times in 2023, with one customer following up with the SPOC service over email to learn more about the resources in their area. SPOC made 152 web tool impressions between July and December of 2023. A web tool impression is defined as users who click to a program website from the referral tool.

Throughout 2023, SPOC made 399 personalized referrals, representing at least 12,477 MF dwelling units,[32] to 46 programs. Of those 399 referrals, 60 applications were submitted to 11 programs, resulting in a 15% conversion rate. SPOC collects information about customer applications using available project data reported from third-party programs and through customer survey responses, and the data collection from these methods may be incomplete.

[32] Five or more dwelling units.

Table 1.6.2.2 provides SPOC program-specific referral data for 2023 (inbound inquiries via hotline calls and email) and includes PG&E programs as well as other utility programs operating in PG&E territory for split commodity properties. While SPOC is a MF resource, the program received inquiries from customers with less than five units and SF dwellings. PG&E SPOC routed at least 123 SF units to the PG&E Energy Action Guide, ESA In-Unit, LIHEAP, the BayREN SF home program (BayREN Home+), the Comfortable Homes program, Energy-Smart Homes, Comfortably CA, TECH, Self-Generation Incentive Program (SGIP), Sacramento Municipal Utility District (SMUD) Smart Homes, water district programs, California Electric Homes Program (CalEHP), Roseville Advanced Homes Program (RAHP), other IOU programs, or Peninsula Clean Energy programs based on eligibility and ownership structure (renter versus owner).

ESA Table 1.6.2.2
SPOC Program Referrals

Program	Customers	Buildings	Dwelling Units SF	Dwelling Units MF
3CE (CCCE) Electrify your Home	6	27	0	478
3CE (CCCE) New Construction Electrification Program	1	3	N/A [a]	N/A
3C-REN Multifamily Home Energy Savings	1	1	0	300
Air Quality Management District Programs	0	0	0	0
Bay Area Air Quality Management District (BAAQMD) Charge! Electric Vehicle (EV) Program (open intermittently)	2	2	- [c]	40
Bay Area Regional Energy Network (BayREN) Bay Area Multifamily Building Enhancements (BAMBE)	24	178	-	3006
BayREN Home+	12	12	24	-
Building Initiative for Low Emissions Development (BUILD)	8	8	1	40
California Alternative Energy and Advanced Transportation Financing Authority (CEATFA) GoGreen Home Energy Financing	0	0	N/A	N/A
California Electric Homes Program (CalEHP)	2	2	1	328
California Energy Design Assistance (CEDA)	3	5	-	367
Comfortable Homes Program	3	4	4	-
Comfortably CA	4	4	2	-
Demand Management Programs	-	N/A	N/A	N/A
Energy-Smart Homes	32	162	7	2008
Energy Star Rebate Finder	0	0	N/A	N/A
ESA CAM (closed 2023)	2	3	-	100
ESA In-Unit	48	63	25	199
ESA Multifamily Energy Savings Program	70	227	-	3916

ESA Table 1.6.2.2 SPOC Program Referrals (continued)				
Program	**Customers**	**Buildings**	**Dwelling Units**	
			SF	**MF**
California Department of Community Serices and Development (CSD) Low-Income Home Energy Assistance Program (LIHEAP)	5	6	4	8
CSD Low-Income Weatherization Program (LIWP)	42	229	-	5448
Los Angeles Department of Water and Power (LADWP) Programs	4	5	N/A	431
Marin Clean Energy (MCE) Multifamily Energy Savings Program (MFES)	2	2	-	196
MCE Strategic Energy Management (SEM)	1	12	-	312
Misc. Electric Vehicle (EV) Programs	5	20	0	286
Modesto Irrigation District (MID) Programs	1	9	0	113
Multifamily Energy Savings Program (MESP) (Program closed in 2023)	4	19	-	706
On-Bill Financing	0	0	0	0
Other Utility SPOC	6	49	-	3578
Peninsula Clean Energy Rebates	2	2	4	5
Peninsula Clean Energy Zero Percent Loans	1	1	4	0
PG&E Energy Action Guide (formerly Market Place)	2	7	1	72
PG&E Rebate Catalog	0	0	0	0
Property Assessed Clean Energy (PACE)	0	0	0	0
Roseville Electric Utility (REU) Roseville Advanced Homes Program (RAHP) (Program closed in 2023)	1	1	1	0
Sacramento Municipal Utility District (SMUD) Home Performance Program	1	18	N/A	-
SMUD MFWB	4	33	-	156
SMUD Smart Homes	5	19	18	0
SMUD Neighborhood Solarshares	1	1	N/A	10
San Diego Gas and Electric (SDG&E) Programs	3	4	4	0
Self-Generation Incentive Program (SGIP)	8	25	1	395
Silicon Valley Clean Energy FutureFit Homes	1	5	N/A	42
Solar on Multifamily Affordable Housing (SOMAH)	9	43	-	306
Southern California Edison (SCE) Programs	6	20	3	612
Southern California Gas Company (SoCalGas) Programs	1	5	N/A	N/A

ESA Table 1.6.2.2 SPOC Program Referrals (continued)				
Program	**Customers**	**Buildings**	**Dwelling Units SF**	**Dwelling Units MF**
Southern California Regional Energy Network (SoCalREN) Multifamily Program	2	3	N/A	124
Southwest Gas Programs	1	1	1	0
TECH Clean California	23	164	13	1708
Turlock Irrigation District (TID) Programs	0	0	0	0
Weatherization Assistance Program (WAP)	5	15	N/A	-
Water District Programs	5	38	1	296
Total units given referrals [b]		**12,477 Multifamily Dwelling Units 123 Single-Family Dwelling Units**		
No program available	5	10	0	243

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

PG&E SPOC tracks the number of link clicks on the SPOC webpage at www.pgemultifamily.com[33], and how many visitors are navigating to one of the program websites from the SPOC landing page. In 2023, 1,513 unique visitors viewed the SPOC website for a total of 42,663 views (indicating repeat visitors)[34] From the SPOC landing page, visitors often navigate to PG&E's homepage or one of the 33 programs shown in Table 1.6.2.3:

ESA Table 1.6.2.3 SPOC Click Data	
Energy Program Website	**# of Clicks**
California Energy-Smart Homes	64
ESA Multifamily Energy Savings	61
MCE Multifamily Energy Savings	52
BayREN	49
GoGreen Affordable Multifamily Energy Financing	43
ESA In-Unit	37
PG&E Website	29
CSD LIWP	23
California Electric Homes	20
SOMAH	20

[33] Last accessed on April 26, 2024.

[34] Note, there were three months with large spikes in views, indicating activity associated with internal website updates or external bots. An estimate of views excluding these spikes may be closer to 4,000 views over the year.

ESA Table 1.6.2.3 SPOC Click Data (continued)	
Energy Program Website	**# of Clicks**
SMUD Multifamily	19
Building Initiative for Low Emissions Development (BUILD)	18
MESP	16
PG&E OBF	14
PG&E Energy Action Guide	13
TECH Clean California	12
ESA CAM	10
The Communities in Charge Program	8
PG&E EV Program	7
Watter Saver	6
SGIP	5
The Switch is On	4
Property Assessed Clean Energy	4
SCE Programs	4
SFPUC Water Conservation Programs	4
Comfortably CA	3
Southern California Gas (SoCalGas) Programs	3
MCE EV Program	2
LIHEAP	2
SDG&E Programs	2
Peninsula Clean Energy Rebates	2
LADWP programs	1
CEDA	1
3CE Programs	1
Total	**559**

EE Multifamily Energy Savings Program (MF MESP)

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

EE Residential Energy Advisor

- **Your Account:** In 2023, the Your Account platform provided comprehensive self-service tools to all PG&E customers (including ESA customers) who are enrolled in Your Account. Key features such as bill journeys, which provide energy usage details and comparisons; Home Energy Checkups, including bill disaggregation; and personalized tips continued to help customers reduce their energy usage. Your Account continued to offer rate comparisons and a Bill Forecast Alert in 2023.
- **Home Energy Report (HER):** PG&E used HERs to promote ESA and other income-qualified programs to its customers. In 2023, 3.2M customers received a HER. Of those, approximately 1M were CARE customers, and approximately 23,000 were FERA customers.

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

PG&E's N. MFWB program did not have new efforts in 2023 to integrate or coordinate with the Energy Efficiency Government Partnerships program as the program launched in the PY and was beginning its ramp up.

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

In 2023, PG&E continued to incorporate ESA and ESA-qualified customers into overall EE program marketing campaigns. This included developing income-qualified versions of monthly digital newsletters, that was sent to nearly 1.7M income-qualified customers, and HERs which offered low- and no-cost programs, as well as energy savings recommendations and behavioral tips to lower energy use and bills. Free tools such as Bill Forecast Alerts and Home Energy Checkups were also promoted to these customers through income-qualified program materials and standard marketing channels including email, digital advertising, and via www.pge.com.[35]

1.6.5. Describe the new efforts in the program year to integrate and coordinate the ESA program with the DR programs, including successes in AC Cycling or other DR programs, including the new Summer Reliability programs from D.21-12-015.[36]

In 2023, PG&E continued its promotion of DR through the ESA program by providing two different promotional leave behinds; the first is a flyer highlighting two DR programs – Power Saver Rewards and SmartAC – that the energy specialist provides during ESA enrollment; and the second leave behind focuses on the SmartAC program, and is provided by the weatherization specialist when ESA customers receive the smart thermostat. In 2023, 943 existing ESA customers also enrolled in the SmartAC program.

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

California Solar Initiative (CSI) programs were fully subscribed and the programs had sunset in PG&E territories by 2023.

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

The SASH program was fully subscribed in PG&E territories in 2021, and therefore no new referrals were made to the SASH program administrator, GRID Alternatives during the year. PG&E provides updates on its referral and coordination efforts with GRID Alternatives for the DAC-SASH program:

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[35] Last accessed on April 26, 2024

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

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

PG&E's ESA program works with GRID Alternatives to deliver ESA services to customers who have been approved to participate in the DAC-SASH program. On a regular basis, GRID Alternatives provides PG&E's with a list of DAC-SASH eligible homes prior to installing solar electric systems. Due to a non-disclosure agreement between GRID and PG&E, GRID also includes the customer's income information that GRID has received and vetted. PG&E checks to see if any of these customers have participated in the ESA program, and if not, reaches out to eligible customers to enroll them in the ESA program. In addition, PG&E utilized GRID's verified income list to automatically enroll 65 customers into CARE or FERA in 2023 who had not already enrolled, based on their income levels. (as noted in CARE Section 2.4.6).

In addition, in 2023, the ESA program continued to provide a list of customers potentially eligible for DAC-SASH to GRID and utilized part of this list in a co-marketing email campaign that resulted in new leads generated for the DAC-SASH program. To illustrate, in 2023, the co-marketing resulted in PG&E sending emails to 23,001 customers that generated 63 DAC-SASH projects, with eight solar electric system installations completed.

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

2023 results are included in Appendix A of this report: ESA Table 13B – ESA Clean Energy Referral, Leveraging, and Coordination.

1.7. Workforce Education & Training

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

Efforts to coordinate the ESA program with other low-income programs resulted in significant collaboration and partnership development. ESA subcontractors actively engage in outreach efforts and partnership development with community organizations, government agencies, and non-profits to streamline access to assistance programs for low-income customers. This collaboration aids information sharing and referral networks.

In 2023, subcontractors continued to focus on hiring and training a diverse group of workers by targeting recruitment efforts in disadvantaged and low-income areas, and establishing partnerships with vocational training programs, community colleges, and community job training organizations.

ESA subcontractors have designed their training programs to meet the specific needs of low-income workers providing training in areas such as EE techniques, safety protocols, and customer service skills.

Subcontractors utilized the Train-the-Trainer model to educate the ESA program workforce. This model of training, "Train-the-Trainer" is a framework for training subject matter experts to enable them to train other people in their organization. As a result, all ESA contractors were equipped with in-house resources to provide entry-level workers with critical technical training as well as information on program requirements and best practices to support the ESA program.

This training model continues to be an efficient method to train the workforce and mitigates "time lost" by avoiding the need to send workers off-site to receive entry level technical training. A significant benefit of this type of model is that it minimizes program costs for both the program team and contractors. It also expands contractors' internal capabilities to provide skill and career growth opportunities, reduces unnecessary travel that impacts carbon emissions, and removes the cost of scheduling barriers to the ESA workforce. The model maximizes safety and meets all program compliance requirements.

In 2023, the ESA program continued to encourage contractors to hire and train low-income workers by facilitating in-house efforts to train employees in skills that increased their knowledge and helped them advance in their careers. The ESA program Team helped guide contractors to provide job coaching, job shadowing, and training materials to help their workforce obtain new skills and have opportunities to move up within their organizations.

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

Training

Table 1.7.2 details the training PG&E directly conducted in 2023, utilizing the Train-the-Trainer model, with over 1,000 individuals trained to both work and train other individuals as Energy Specialists, Weatherization Specialists, and Natural Gas Appliance Testing (NGAT) technicians for the ESA program.

ESA Table 1.7.2 ESA Program Training			
Type of ESA Training Conducted	**Length of Training**	**2023 Employees Trained**	**Student Days**
ESA Program Onboarding Total [a]		**255**	**255**
ESA Program Onboarding On-Demand	Self-Paced	255	255
Energy Specialist (ES) Total -		**171**	**253**
ES Certification Training OnDemand	Self-Paced	89	89
ES Certification Training Live	2 days	82	164
Weatherization Specialist Total		**229**	**229**
Weatherization Specialist Training OnDemand	Self-Paced	122	122
Weatherization Specialist Training Live	1 day	107	107
Advanced Weatherization Specialist Total		**189**	**189**
Advanced Weatherization Specialist Training OnDemand	Self-Paced	116	116
Advanced Weatherization Specialist Training Live	1 day	73	73
NGAT Total		**197**	**288**
NGAT Training Blended OnDemand	Self-Paced	106	106
NGAT Training Blended Live	1 Day	91	182
Total	**-**	**1,041**	**1,241**

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

Recruitment:
As detailed below, contractors employ a comprehensive recruitment strategy that combines online platforms, employee referrals, specialized networks, job boards, apprenticeship programs, job fairs, local resources, employee engagement, social media, and collaborations with workforce programs to attract a diverse pool of candidates and meet their hiring needs. Some examples of recruitment efforts include:

- **Online Platforms:** Contractors leverage various social media platforms like Indeed, Craigslist, LinkedIn, and others to advertise job openings. These platforms are widely used to reach a broad audience of potential candidates.
- **Employee Referrals:** Current employees are incentivized with recruiting bonuses for referring family and friends who stay with the company for at least six months. This encourages internal referrals, which can be a valuable source of talent.
- **Internal Posting:** Job openings are initially posted on the contractor's internal platform using BambooHR. This system then automatically disseminates the job listings to external platforms like Indeed, Glassdoor, and ZipRecruiter, increasing visibility to job seekers.
- **Specialized Referrals:** Contractors also tap into specific networks, such as referrals from HVAC tech schools, to identify potential candidates with relevant skills and training.
- **Diverse Job Boards:** Contractors utilize a variety of job boards, including Indeed, Zip recruiter, Monster, Jobs2Careers, and LinkedIn. These platforms provide a wide reach to attract candidates with diverse backgrounds and qualifications.

- **Apprenticeship Programs:** When applicable, contractors send notifications to apprenticeship programs in their service areas, fostering connections with individuals seeking career development opportunities.
- **Job Fairs:** Contractors actively participate in job fairs throughout the state of California to recruit talent. They focus on their contracted territory during these events.
- **Local Resources:** Contractors' leverage local resources such as CalJOBS.ca.gov, local Workforce Development Board websites, and the State of California Employment Development Department to promote job training programs and employment opportunities in local and DACs.
- **Social Media Campaigns:** Contractor's utilize social media campaigns to increase its visibility and reach among potential candidates.
- **Workforce Programs:** Periodically, contractors collaborate with local workforce programs to tap into additional sources of talent.
- Engaging with existing ESA program customers who may be interested in getting hired as contractors

In 2023, PG&E widely promoted the Energize Careers which is delivered through the Career & Workforce Readiness (CWR) program to subcontractors. Many expressed interests in utilizing their resources and services.

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

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

PG&E's contracts with its two primary ESA implementers require that implementers and contractors track hiring of local and Disadvantaged Workers DW,[37] as well as trainings offered and completed, ESA job attainment, and ESA worker advancement. As such, the program is structured so that all ESA contractors and 100% of ESA contracts can provide career pathways to disadvantaged workers. All of PG&E's ESA implementers and contractors completed verification of their workforce development efforts, and in sum reported that 159 employees met the Disadvantaged Worker designation. In addition, 75 of those individuals were promoted to higher positions within their organization in PY 2023.

[37] D.18-10-008 "Decision Addressing Workforce Requirements and Third Party Contract Terms & Conditions," defines a disadvantaged worker as "an individual that meets at least one of the following criteria: lives in a household where total income is below 50 percent of Area Median Income; is a recipient of public assistance; lacks a high school diploma or GED; has previous history of incarceration lasting one year or more following a conviction under the criminal justice system; is a custodial single parent; is chronically unemployed; has been aged out or emancipated from the foster care system; has limited English proficiency; or lives in a high unemployment ZIP code that is in the top 25 percent of only the unemployment indicator of the CalEnviroScreen Tool."

Number of Career & Workforce Readiness (CWR) Participants Employed for 12 Months After Receiving Training

In 2023, statewide, 133 CWR participants have been employed for 12 months after receiving training. This number does not include CWR participants who were employed in 2023 but did not meet the 12-months of employment criteria, or those who are still actively involved in training and have not yet been placed in jobs.

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

In 2023 approximately 80% of ESA contractor training participants and approximately 48% of EE Workforce Education & Training (WE&T) Technical Upskill training participants met the definition of disadvantaged worker.

1.8. Studies

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

Table 1.8.1 provides an overview of the ESA Studies that PG&E and/or the IOUs conducted in 2023. Budgets associated with these authorized studies are provided in Appendix A of this report: ESA Table 14 – ESA Expenditures for Pilots and Studies.

ESA Table 1.8.1
ESA Studies

Study	Lead Consultant	Contracting IOU	Project Initiation	Project Completion
Categorical Eligibility Study	Evergreen Economics	SDG&E	Jun 2022	Jun 2023
2025 Low Income Needs Assessment (LINA)	Evergreen Economics	SoCalGas	Jan 2024	Dec 2025
Non-Energy Impacts (NEIs) Study	Evergreen Economics	SCE	Feb 2024	Jun 2025

2025 Low Income Needs Assessment (LINA) Study

AB 327 (Public Utilities Code Section 382) requires a Low Income Needs Assessment (LINA) to be conducted on behalf of PG&E, SDG&E, SCE and Southern California Gas Company (SoCalGas), (collectively the Joint IOUs) and the ED every three years.

Scope planning for the 2025 LINA began when the Low Income Oversight Board (LIOB) Needs Assessment Subcommittee (Subcommittee) met with ED and IOU staff to discuss potential topics for the study in March 2023. Among a list of potential topics, the characterization of high and low energy-using low-income households was selected, with the objective of providing recommendations on how the ESA program can best serve these customers.

A meeting with the Subcommittee and stakeholders took place in May 2023 to share the research topic along with a high-level scope. As the IOU contract lead, SoCalGas issued a Request for Proposal (RFP) in June 2023, and solicitation activities progressed for the rest of the year. Evergreen Economics was selected as the third-party evaluator to conduct this study through the competitive solicitation. The study was set to commence in January 2024, and is expected to be completed by the end of 2025.

Non-Energy Impacts (NEIs) Study

D.21-06-015 authorized a Non-Energy Impacts (NEIs) study with a budget of $500k[38] and directed the ESA WG to provide inputs on study scope.[39] A Tier 1 AL[40] was subsequently submitted by the Joint IOUs, which informed the Commission of the next steps to be taken to begin the NEIs Study, and how the recommendations from the ESA WG were taken into consideration. The primary objective of the NEIs Study is to assess and quantify health, comfort, and safety impacts as a result of ESA program treatments. Competitive solicitation for the study concluded in December 2023, with Evergreen Economics as the selected third-party consultant. The project was set to commence in February 2024. The NEIs Study is expected to be completed by June 2025.

1.8.2. For studies that concluded in 2023, submit a Final Study Report describing the: (1) overview of study; (2) budget spent vs. authorized budget; (3) final results of study; and (4) recommendations.

ESA/CARE Categorical Eligibility Study

1) Overview of the Study

SDG&E, on behalf of the Joint IOUs, contracted with Evergreen Economics in June 2022 to review and assess means-tested public assistance programs that could serve as a way to qualify households categorically for the CARE, ESA and FERA programs. The objectives of this study included:

1. Determine the degree of alignment of eligibility requirements of existing categorical eligibility programs with those of the CARE, ESA, and FERA programs;
2. Identify other means-tested programs that could serve to ensure categorical eligibility;
3. Recommend practical criteria for selection of programs to be used to provide categorical eligibility, and recommend which programs should provide categorical eligibility going forward; and
4. Inform potential future auto-enrollment of participants from recommended categorical eligibility programs directly into CARE or FERA by assessing the suitability of auto-enrollment for recommended categorical programs and the steps required to establish auto-enrollment.

An additional task in the study involved assessing the feasibility of automatic enrollment for CARE and FERA using categorical programs. The study was finalized in June 2023 and the final report, public comments on the report, and a database of program characteristics used in the analysis were posted on the Commission's public document website.[41] Results of the study were subsequently used to inform a Joint IOU AL proposing an updated list of categorical programs to be used for ESA and CARE enrollment; the AL is currently pending for disposition.[42]

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[38] IOU cost share is as follows: PG&E 30%, SCE 30%, SoCalGas 25%, and SDG&E 15%.

[39] D.21-06-015, OP 172.

[40] SDG&E AL 4184-E, March 23, 2023.

[41] https://pda.energydataweb.com/#!/documents/2814/view (Last accessed on April 26, 2024)

[42] AL 4304-E/3240-G dated October 13, 2023.

2) Budget Spent versus Authorized Budget

The authorized budget for the ESA/CARE Categorical Eligibility Study was $150k[43]. The total spent on this study was $149,960. The costs were shared amongst the four IOUs using the following split: PG&E 30%, SCE 30%, SoCalGas 25%, SDG&E 15%.

3) Final Study Results and Recommendations

Evergreen collected data on seventeen third-party assistance programs which were identified by the IOU study team and stakeholders, including the nine statewide programs currently used for categorical eligibility by CARE and ESA.[44] They developed a set of criteria to organize and assess the alignment of the programs with the statutory eligibility requirements for CARE and ESA. Criteria for assessment included the unit of eligibility (e.g. individual or household), income eligibility thresholds, other non-income eligibility criteria, duration of program participation, and assurance of eligibility. Each categorical program was then assessed and classified according to the extent they aligned with CARE and ESA eligibility requirements. ESA Table 1.8.2 shows the results by category.

ESA Table 1.8.2
ESA Study Recommendations by Category

Category	Category Description	Recommendation	Programs
1	Best aligned	Recommended	CalFresh, WIC
2	Next best aligned	Recommended with modest risk	LIHEAP
3	Partially aligned and possibly feasible	Option to use partially for income-qualified customers	AIAN Head Start, California Head Start, CalWORKS, Lifeline, SSI
4	Partially aligned and less feasible	Not recommended	CHIP, Medi-Cal, NSLP, Section 8, Section 202
5	Least aligned	Not recommended	CMFRF, CFCIP, CCDBG
6	Unable to assess due to lack of information	No recommendation possible	BIA General Assistance

As shown in ESA Table 1.8.2, Evergreen recommended the Joint IOUs consider retaining both category 1 and category 2 programs as categorical eligibility enrollment options. In addition, they noted that category 3 programs could be partially considered if it were possible to identify participants who qualified based on income and not alternative paths to entry. Evergreen further recommended not using programs in categories 4 and 5 for categorical enrollment as their use would include a significant risk of enrolling non-eligible customers. Furthermore, the study reported the use of categorical eligibility for FERA would not be practical given 1) FERA's narrow income range for eligibility and 2) none of

[43] D.21-06-015 at OP 170.

[44] The nine current programs include the Bureau of Indian Affairs General Assistance, CalFresh (Food Stamps) / SNAP, CalWORKs (TANF) or Tribal TANF, Head Start Income Eligible (Tribal Only), LIHEAP, Medicaid/Medi-Cal for Families A & B, National School Lunch Program (NSLP), SSI, WIC. Additional programs assessed include California Head Start, Lifeline, Children's Health Insurance Plan (CHIP), Housing Choice Voucher Program (Section 8), Supportive Housing for the Elderly (Section 202), California's Military Family Relief Fund (CMFRF), Chafee Foster Care Independence Program (CFCIP), Child Care and Development Block Grant (CCDBG).

the third-party programs analyzed use a minimum household size of three individuals as required by FERA.

It is important to note that none of the recommendations in this study preclude any income-eligible household from receiving reduced rates under CARE or energy-saving measures under the ESA program. The elimination of a categorical program does not change any income eligible household's access to CARE or ESA. Households may still apply through self-certification of their income which does not incur additional barriers to accessing the program benefits.

An additional task in the study assessed the feasibility of using categorical programs for auto-enrollment into CARE or FERA. For CARE auto-enrollment, the study reported auto-enrollment would be feasible but may be of limited benefit. For FERA, however, none of the programs reviewed would be able to identify potential FERA participants because none analyzed use a minimum household size of three individuals.

1.9. Pilots

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

ESA Pilot Plus and Pilot Deep:

An overview of ESA PP/PD can be found in Section 1.1 – Energy Savings Assistance Program Overview. A detailed description of the customer targeting and outreach approach is provided in Section 1.2.2 of this report. A summary of the pilot project lifecycle is provided below.

PG&E and the Pilot implementation team have adopted a test-and-learn approach, accommodating room for experimentation and adoption of lessons learned throughout the life of the Pilot. As such, noteworthy changes to the Pilot's approach were implemented in 2023, listed in table 1.9.1.1. A more detailed description of the distinguishing pilot design elements were provided in the 2022 Annual Report.[45]

[45] Available at: https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M507/K658/507658600.PDF (Last accessed on April 26, 2024)

ESA Table 1.9.1.1 PY 2023 ESA Pilot Plus/Pilot Deep Project Lifecyle and Key Changes	
1. Targeting	
Key Design Features	• Data-driven customer targeting based on customer attributes, propensity score and savings potential score. • Campaign development in coordination with ESA Main.
Changes in 2023	• PG&E and its partners continued to iterate on targeting methodologies. • Operational improvements were implemented to optimize coordination between ESA Main and Pilot.
2. Outreach	
Key Design Features	• Invitation-only to align with targeting plans. • Email, direct mail marketing campaigns; phone and email-based follow-up with limited door-to-door outreach.
Changes in 2023	• Pilot Implementer shifted phone, email and in-person lead conversion efforts to be largely managed by subcontractors. • PG&E assumed responsibility for email and direct mail campaigns. • Campaigns shifted from large email and mail releases all at once, to smaller weekly batches over 3-6 weeks.
3. Enrollment	
Key Design Features	• Adopt traditional ESA enrollment processes and standards. • Apply additional eligibility criteria based on the feasibility of achieving deep savings in the home. • Conduct enrollment and assessment in fewer home visits.
Changes in 2023	• Pilot Implementer shifted from collecting enrollment forms in-person during the home assessment, to collecting virtually prior to assessment, thereby minimizing time and cost associated with assessing ineligible homes. • PG&E launched an optional self-screening questionnaire to expedite eligibility screening.
4. Assessment	
Key Design Features	• Diagnostic-driven whole-home energy assessment.
Changes in 2023	• Efficiencies implemented to reduce the length of the assessment, such as by switching to a pressure pan test in lieu of a duct-blower test. • Installation subcontractors cross-trained to perform assessments.
5. Energy Modeling	
Key Design Features	• Generate multiple energy savings scenarios to maximize energy savings potential.
Changes in 2023	• Installation subcontractors cross-trained to perform energy modeling.
6. Installation	
Key Design Features	• Complete installation of the entire home treatment plan in as few home visits as possible and over as short a timeframe as possible.
Changes in 2023	• None
7. Project Inspection and Close-Out	
Key Design Features	• Pilot Implementer or their QA/QC partner conducts performance-based assessment of home to ensure energy saving measure performance thresholds are met. • Pilot implementer and installation subcontractors ensure all permits are properly closed. • PG&E inspects project measures to ensure they were installed according to established installation standards.
Changes in 2023	• Pilot Implementer added another QA/QC partner to enable ramp-up. • The new QA/QC firm holds appropriate certifications to complete additional non-program inspections where required by State and local agencies, reducing visits to the customer home.
8. Monitoring	
Key Design Features	• Normalized Meter-Based Energy Consumption (NMEC) savings methods are used to identify realized savings to the household. • Pilot Implementer will diagnose why certain projects are not meeting energy savings targets, and propose additional intervention strategies.
Changes in 2023	• None

ESA Table 1.9.1.1 PY 2023 ESA Pilot Plus/Pilot Deep Project Lifecyle and Key Changes (continued)	
9. Ongoing Education	
Key Design Features	• Each customer receives at least two educational calls each year (around summer and winter) from the Pilot Implementer. • Ongoing customer education is envisioned to support customers in achieving target energy savings, and to sustain energy savings longer term.
Changes in 2023	• PG&E and the Pilot Implementer are considering conducting a deeper intervention with a subset of customers to enable more reliable evaluation findings.
10. Evaluation	
Key Design Features	• Pilot Implementer and their Implementation Partner conduct NMEC analysis on an ongoing basis. • Pilot adopts realization rates as NMEC data updates are available. • Later, a third-party Pilot Evaluator will conduct more comprehensive evaluations of the program design, bill impacts, etc.
Changes in 2023	• None

Summary of Activities Occurring in 2023

In 2022, the Pilot's focus was on launching the program and all initial capabilities to treat homes (e.g. marketing, installation contractor recruitment, initial training, program documentation, etc.).[46] In 2023, the Pilot shifted focus to increasing the Pilot's capacity to serve more customers. The Pilot met many of its objectives in 2023, particularly with respect to implementation operations, energy savings, and customer engagement.

The Pilot grew capacity, having started the year with a single project in the installation phase and ending the year with 131 projects in various stages of installation (including 56 fully closed by year's end).[47] On average, initial energy savings estimates for completed projects are within the desired thresholds: 10% for PP (target: 5-15%) and 21% for PD (target: 15% and above).[48] All of this was done with an overall customer satisfaction score of 81%.

A summary of key activities are listed below:

Marketing Approach

The Pilot's core marketing strategy shifted in 2023, as described in Section 1.2.2 of this report.

External Partnerships

In early 2023, the Pilot Implementer prepared a report on its planned and completed partnership engagement activities. Planned partnership efforts focus on workforce development, professional associations, colleges, trades and complimentary programs with leveraging opportunities. The Pilot conducted ongoing conversations with three potential program leveraging partners, although no formal plans have been reached.

[46] 2022 efforts were included in the 2022 PG&E ESA/CARE/FERA Annual Report, available at: https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M507/K658/507658600.PDF

[47] Households treated and savings will be reported when projects have been fully closed (i.e., inspected, issues resolved, permits closed, as applicable) and reported by Pilot implementer to PG&E.

[48] Energy savings are reported based on best available information at the time of reporting. Pre- and post-installation savings are derived from energy modeling software. The energy modeling software estimates savings within +/- 10% certainty. PG&E intends to report the lower value in this range as interim savings until meter-based savings estimates are reportable.

Implementation Partnerships
The Pilot Implementer started the year with three installation subcontractor agreements in place, and grew their partnerships to six by year's end. Additionally, the Pilot Implementer secured an agreement with an inspection company experienced in home performance and Title 24/HERS[49] compliance, helping to expand quality assurance/quality control (QA/QC) capacity as the number of projects increased. Each of these partnerships helped position the Pilot to serve more customers. Subcontractors previously onboarded include one for customer targeting and energy savings analytics, and another for supporting quality assurance/quality control and specialized projects (such as electrification).

Workforce Development
By mid-year the Pilot Implementer completed an initial round of training to expand the installation subcontractor's role in the Pilot. While originally focused on project installation, the subcontractor role grew to include customer outreach and lead conversion activities, which will allow contractors to more quickly transition interested customers into eligibility screening and home assessments (building upon knowledge of traditional ESA outreach, and integrating the additional eligibility criteria unique to the Pilot). The subcontractor role also shifted to include the relatively more advanced home assessment unique to the Pilot. Toward the end of the year, the Pilot Implementer began shifting energy modeling to subcontractors, including training on the modeling software.

The Pilot Implementer conducted this sort of training throughout the year for existing and new installation subcontractors. Such efforts helped the Pilot increase capacity, and also aligned with workforce development outcomes by providing opportunities for more workers to obtain specialized training and hands-on job training experience,[50] particularly with the advanced home assessments which are based on Building Performance Institute (BPI)[51] methods.

In addition, PG&E arranged a training session for Pilot Implementer staff in August, focusing on eligibility, measures and referral procedures for energy assistance programs administered by the CSD. The training provided greater awareness of the alternative services the Pilot implementer can refer customers to, in the event customers do not qualify for either the Pilot or the ESA Main program.

Finally, a workforce development assessment workplan was completed in December, informed by interviews with PG&E and Pilot Implementer staff. The workplan sets out objectives and tactics for further assessing workforce development opportunities in 2024, including structured interviews with the Pilot's installation subcontractors.

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[49] HERS stands for Home Energy Rating System Program, a diagnostic field verification program administered by the California Energy Commission.

[50] The Pilot implementer monitors workforce development through an annual survey.

[51] For more information, refer to https://www.bpi.org/ (Last accessed on April 26, 2024)

New Measures

The Pilot is granted flexibility in adding measures to explore the potential for achieving deep energy savings.[52] In October, PG&E approved one new measure: single-packaged heating and air conditioning unit (packaged HVAC). The measure was proposed because, up to that point, such systems had been found in five homes assessed by the Pilot. Without the HVAC measure, the projects did not meet minimum savings thresholds. Adopting the measure enabled most of those projects to proceed, and will enable future assessments to consider homes with packaged HVAC. While packaged HVAC units can generate reasonable electric savings for air conditioning, the natural gas energy savings for heating are assumed to be near zero.[53] Because of this, the Pilot will first assess the feasibility of installing packaged heat pump HVAC units. If infeasible, an electric and natural gas packaged unit or alternatives will be considered.

In addition, the Pilot updated measure minimum feasibility to align with or exceed new minimum performance standards adopted by the State of California Energy Commission in the statewide Building Energy Efficiency Standards (Title 24, Part 6), which became effective as of January 2023.

Electrification

The Pilot provides the opportunity to explore the energy savings potential of a wider breadth of energy saving measures than have traditionally been adopted by the ESA program. This includes electrification measures.[54] The Pilot has offered several electrification measures since Pilot launch, including heat pump space conditioning and HPWH measures, which offer greater efficiency and enable fuel substitution[55] from natural gas to electricity, where feasible.

In November 2023, the Pilot completed installation of one electrification project, whereby the customer's natural gas fueled space conditioning and water heating equipment were replaced with heat pump technology. The Pilot's project evaluation process consisted of thorough review of the energy audit data, customer bill impacts, customer preferences, and electrification feasibility, prior to PG&E authorizing the fuel substitution project. This project was estimated to generate approximately 50% energy savings at the household level, based on converting energy usage to a common value (MMBtu). However, energy savings does not equate to bill savings on a one-for-one basis because of the difference in electric and gas rates and rate structure, as well as energy use patterns associated with heat pumps. For this reason, PG&E will carefully evaluate the feasibility of electrification projects over the course of the Pilot. PG&E presented an overview of its Pilot-specific electrification strategy during the November 9, 2023 Clean Energy Workshop.[56]

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[52] The ESA PP/PD program follows the measure modification procedure described here: https://pda.energydataweb.com/api/downloads/2788/PG%26E%20ESA%20Pilots%20Measure%20Modification%20Process_1-Pager_20221114-FINAL.pdf (Last accessed on April 24, 2024)

[53] For more information, visit: https://www.caetrm.com/login/?next=/measure/SWHC049/03/ (Last accessed on April 24, 2024)

[54] D.21-06-015, Attachment 2, p. 1.

[55] The definition of fuel substitution in D.19-08-009 is being used. Fuel substitution refers to measures that result in fuel replacement (typically from gas to electric) where both fuels are provided by one or two CPUC-regulated utilities. Fuel switching, on the other hand, refers to measures that result in replacement of non-utility fuel commodities, such as wood or propane.

[56] Information related to the CPUC Clean Energy Workshop can be found at: https://www.cpuc.ca.gov/events-and-meetings/clean-energy-programs-workshop-2023-11-09 (Last accessed on April 26, 2024)

Meter-Based Savings
PG&E intends to monitor energy savings for at least 12 months after installation, using an energy savings analysis technique called Normalized Meter-Based Energy Consumption (NMEC). Throughout 2023, PG&E collaborated with the Pilot Implementer and its implementation partner specializing in NMEC to stand up the necessary data sets and transfer processes necessary to conduct NMEC analysis. By the end of 2023, the NMEC processes were developing monthly data refreshes. However, the NMEC methods used by the Pilot requires two major conditions to be met before analysis can begin: 1) at least 12 months of post-installation energy usage data must be available, and 2) there must be enough projects of similar savings thresholds (i.e. 5-15%, 16-25%, 26-50%, etc.) to generate reliable conclusions. The first NMEC analysis is expected to be ready in mid-2024.

Customer Survey
PG&E launched a post-installation survey for participating customers. Of the 33 respondents, the overall satisfaction was 81% on average, with a mean score of 85%. The survey was deployed by a vendor under PG&E's oversight, separate from the Pilot Implementer and installation subcontractors.

Lessons Learned/Opportunities for Improvement
Significant progress was made in the Pilot throughout 2023, and key lessons learned were documented and incorporated into the Pilot's plans, and are detailed below:

1. **Launching pilots takes time. The time necessary to launch varies depending on the program design, implementation model, and overall complexity of objectives.**

As reported in the 2022 Annual Report, PG&E conducted a competitive solicitation for the design and implementation of the Pilot. The third-party designed and implemented approach was taken primarily to drive innovation. PG&E believes the Pilot is well positioned to do that; however, one key lesson learned is that standing up an entirely new pilot operation takes substantial time. When launching new program elements, feedback from initial efforts must be reviewed and incorporated to ensure operations are safe, reliable and deliver customer satisfaction. The prior PYs 2022 and 2023 were focused on launching and ramping up the Pilot's capacity respectively. PG&E intends to conduct far more work in 2024 and 2025, and then to ramp-down operations in 2026. Thus, the majority of Pilot data will be collected mid-way through the Pilot's lifecycle.

2. **The original marketing plan needed to be revised to drive more interest in the Pilot.**

Several lessons learned were observed in the Pilot's marketing and outreach approaches, and Section 1.2.2 contains a detailed description of the iterative adjustments made to the marketing approach. One important takeaway is the importance of flexibility and nimbleness to shift plans and approaches based on real-time outcomes.

3. **There are numerous benefits to leveraging the relative maturity of the traditional ESA Program's operation.**

As mentioned above, the third-party Pilot Implementer shifted its operational approach in 2023 with respect to who conducts follow-up outreach to customers, home assessments and energy modeling. While this work was originally envisioned to be completed by the Pilot Implementer, the work was shifted to installation subcontractors. In most cases,[57] the installation subcontractors supporting the Pilot are also experienced in the ESA Main program. Thus, the contractors' workforce was already in place and experienced with ESA policies and procedures, which enabled Pilot capacity to ramp up quicker than if the Pilot Implementer were to hire new staff to fill the need.

The contractors also provide valuable expertise and feedback about implementing the ESA policies and procedures, installation standards, and customer engagement approaches common across both the ESA Main program and the Pilot. The Pilot is attempting to both build upon the traditional ESA model, and to innovate in several key areas.

4. **Contractor and workforce training is necessary to implement novel aspects of the Pilot design.**

As part of the transition of assessment work to installation subcontractors, the Pilot Implementer ensured the Pilot workforce was properly trained to conduct the work. Prior to the transition, all assessors were Building Performance Institute (BPI) certified before beginning work. Post transition, some, but not all, assessors were BPI certified or pursuing certification. To bridge the gap, the Pilot Implementer developed and leads a BPI "crash course" for essential skills related to a diagnostic-driven whole-home energy assessment. The training is recommended, but not required.

5. **A comprehensive Home Energy Assessment identifies the maximum savings opportunities, but can be lengthy.**

The Pilot utilizes a diagnostic-driven home energy assessment to identify as many opportunities for energy savings as possible, fully populating the energy model with variables which may impact its savings estimates. The diagnostic process is more exhaustive than the procedures developed for the traditional ESA program. Early in the Pilot's operation, the Pilot Implementer shared that home assessments can take three to four hours on average, which can negatively impact customer satisfaction.

The Pilot Implementer developed a solution to cut the assessment timeframe by 30-45 minutes by utilizing a different technique for duct leakage detection. Since the whole-home diagnostic process already includes a blower door test, the assessors saved time by eliminating the duct-blower setup. Additionally, the technique reduces time on ladders, which supports worker safety.

6. **Projects involving electrification can be more complex.**

The Pilot is permitted to install electrification measures.[58] PG&E appreciates the opportunity to explore the feasibility of installing electrification measures in an ESA program model, and many of the lessons identified in the San Joaquin Valley DAC Pilots,

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[57] Of the Pilot Implementer's installation subcontractors, all but one also perform work for the ESA Program. However, not all contractors who provide installations for the ESA Program will work for the ESA Pilot, due to the smaller scale of the pilot.

[58] CPUC D.21-06-015, Attachment 2, p. 1.

which also included electrification, are applicable to this Pilot.[59] For instance, the electric service and distribution infrastructure serving PG&E customers varies in capacity and age, meaning some sites require more infrastructure upgrades than others to enable the safe and reliable addition of electric load. Given the Pilot's focus is not exclusively on electrification, PG&E focused electrification opportunities in areas where there are the least infrastructure upgrades required. The Pilot experimented with approaches to identify ideal electrification sites throughout 2023. As of the end of the PY, PG&E was actively developing tools to identify in advance where electrification is likely feasible.

7. **Customer targeting is data-intensive. PG&E was able to reduce the amount of data required by utilizing a tool developed for other targeting efforts.**

PG&E exercises a data minimization policy whereby only the minimum amount of data is provided to fulfill a business need. Interval data generated from PG&E smart meters can yield invaluable insights about energy consumption patterns, but represents substantial customer records.[60]

The Pilot's targeting methodology is designed around PG&E's IDAT, originally developed by PG&E to support market-rate EE programs prior to the Pilot's utilization of the tool. IDAT was developed from PG&E's previous research on targeting, and is intended to significantly minimize the amount of data PG&E shares with its partners, in an effort to preserve customer privacy and reduce risk of data loss. Potential uses of IDAT data include program targeting to identify the customers most likely to benefit from and enroll in load management programs. This data can become even more powerful when combined with marketing datasets, or real estate data sets to better understand the customer needs, as was the case with this Pilot.

8. **Customer education and coaching is an important program design element, but its effect can only be measured with intentional experimental design.**

In 2023, the Pilot explored the feasibility of achieving deep energy savings. This exploration entails new measures and new approaches, and is intended to result in realized savings for participating customers. The role that customer education plays in this Pilot has so far not been measured, but PG&E and the Pilot implementation team envision a strategy tying education to persistent energy savings. Throughout 2023, the plan had been to conduct winter and summer seasonal calls to customers to advise on energy saving practices. While likely a supportive resource overall, the current approach may not be measurable in the eventual Pilot evaluation. The Pilot implementation team has been considering a more focused educational offering for a subset of customers as to improve the eventual evaluator's ability to discern behavioral intervention from other measure impacts. No definitive decision was reached in 2023.

Planned Activities for 2024

The Pilot will continue to ramp-up capacity in 2024, beyond its current capacity of approximately 20 projects installed per month to a target capacity of approximately 40 projects installed per month. Tactics to improve capacity include optimizing the customer recruitment process, working with existing contractors to expand capacity, recruiting additional contractors, and improving the Pilot's operation end-to-end.

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[59] PG&E's progress reports for the San Joaquin Valley DAC Pilots can be found at https://apps.cpuc.ca.gov/apex/f?p=401:56:0::NO:RP,57,RIR:P5_PROCEEDING_SELECT:R1503010 (Last accessed on April 26, 2024)

[60] Interval data refers to energy usage data collected in intervals (i.e. 15-minute, 60-minute, daily, etc.) utilizing Advanced Metering Infrastructure (AMI). A single customer's 15-minute electric interval data for one year represents approximately 35,000 data points.

In Q1 2024, the Pilot implementation team will focus on three major areas which carry over from 2023 efforts:

Customer recruitment
PG&E plans to conduct email and direct mail marketing campaigns in each quarter of 2024 to build the pipeline of potential projects. Customer recruitment was effective in growing the Pilot's capacity through 2023, but to continue to grow capacity, the Pilot will need to recruit more customers more consistently throughout the year.

The Pilot also embeds data collection into its marketing efforts by establishing an evaluation plan ahead of select campaigns. This is necessary because the novel customer targeting methods developed for this Pilot may yield important insights for the future of ESA recruitment. Throughout Q4 2023, the Pilot implementation team developed an evaluation plan for the Q1 2024 marketing campaign, including generating a new customer targeting list with segmented groups for comparison. The plan also included incremental adjustments to the consumption analysis technique used in the Q2 2023 campaign. The campaign will be deployed in early Q1 2024.

Project close-out
By the end of 2023, approximately 57% of initiated projects were in various states of installation or post-installation. The Pilot implementation team has set goals to reduce the length of treatment from first customer contact to project close. Similarly, the Pilot intends to reduce the number of visits to the customer home where possible. Progress in these areas is expected to improve administrative efficiency, and support customer satisfaction.

Installation quality
Installation quality is an essential aspect of the Pilot design, intended to support deep and persistent energy savings. Moreover, quality installation helps reduce time and cost associated with corrections. Because the Pilot is installing some measures which the traditional ESA program is not, or in the case of attic insulation, installing certain measures more often, there can be gaps in knowledge leading to more errors. By the end of 2023, the Pilot Implementer had developed a plan to incorporate 2023 inspection findings into a contractor training session. The training is scheduled to occur in January 2024. PG&E and the Pilot Implementer will also meet in Q1 2024 to review findings from contractor interviews (anticipated to conclude in January 2024), and prioritize solutions that will reinforce quality installation.

Other major initiatives
Throughout 2024, the Pilot will endeavor to make greater progress on and generate lessons learned from the following initiatives:

- Once the NMEC analysis yields an initial realization rate, the Pilot will adapt its approach to ensure deep, persistent savings are achieved.
- Document the opportunities and challenges with electrifying common gas appliances, such as furnaces, water heaters and cooking appliances, among others.
- Establish more partnerships to improve Pilot effectiveness, leverage outside expertise, and possibly secure more resources for Pilot participants.
- Determine what steps the Pilot can take to support workforce development. Hire a third-party evaluator to conduct the formal Pilot evaluation.

Status of Pilot Evaluation

Because PG&E opted for a third-party designed and implemented approach to execute the Pilot, the program design was not entirely defined before the successful Pilot Implementer was selected. Moreover, given lessons learned throughout 2022 and 2023, the Pilot design had shifted in a few notable areas, as summarized above. In addition, 2022 and 2023 were largely focused on ramping up capacity to serve more customers through Pilot operations. As a result, relatively fewer projects were completed in the first two PYs than are anticipated to occur between 2024-2026. For these reasons, PG&E had not initiated a solicitation for a third-party evaluator in either 2022 or 2023.

By the end of 2023, PG&E had determined that enough progress would be made on the Pilot by mid-2024 to allow an evaluation to begin. PG&E will focus the evaluation strategy on the following objectives:

ESA Table 1.9.1.2 ESA PP/PD Evaluation Focus Areas	
Evaluability Assessment	Develop evaluation plan, set up experimental design and evaluation framework, and establish robust data collection to enable performance assessment.
Process Evaluation	Perform a process evaluation and identify opportunities to improve customer experience, fine-tune program implementation, and optimize energy savings. • Launch pre- and post- installation surveys to assess customer satisfaction and non-energy impacts. • Conduct waterfall/survival or other analysis to understand 1) at which process steps are customers most likely to disengage with pilot and 2) reasons for program ineligibility and treatment infeasibility.
Impact Evaluation	Develop sampling plan and conduct impact evaluation to estimate average household realized energy savings and participant bill impacts. Identify design elements attributing to deep energy savings (i.e. measure incremental effects of new design approaches).
Program Design	Compare and contrast ESA Pilot and ESA Main program designs and implementations. Identify learnings and best practices that can be applied towards ESA Main to achieve deeper energy savings.
Scalability	Assess the Pilot's overall scalability and cost-effectiveness (i.e. by climate zone, housing types, other segments) based on Pilot outcomes and value proposition.
Measure Packages	Evaluate performance of various measure packages, i.e. new measures and combinations of measures (including electrification) unique to the Pilot.

One of PG&E's objectives for this evaluation is to generate as many useful findings as possible to inform the next ESA application. While exact filing dates for the application are currently unknown, PG&E plans to establish early milestones for its evaluation tasks in an effort to position the evaluation to support PG&E's application planning throughout 2024 and 2025.

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

There are no Final Pilot Reports to submit for 2023.

1.9.3. Miscellaneous

1.9.3.1. LIFT Pilot

D.21-06-015 requires that Marin Clean Energy's (MCE) Low Income Families and Tenants (LIFT) pilot was to be extended through December 2023 at an annual budget of $1.3M or $3.25M total, and that PG&E was required to collect and transfer these funds to MCE, with all unspent and uncommitted funds being returned to ratepayers through PG&E"s annual true-up advice letter in 2024. PG&E transferred a total of $1.3 M to MCE on12/15/2022 for MCE LIFT pilot in 2023, and continues to coordinate on MF efforts with MCE.

1.9.3.2. Virtual Energy Coach (VEC) Pilot

While D.21-06-015 approved PG&E's concept for a Virtual Energy Coach (VEC), a pilot envisioned to evaluate the impacts of personalized communications in the income-qualified market, PG&E reported in the 2022 Annual Report that it had paused the development of the VEC Pilot as the hired implementer was unable to complete the project, and refunded to PG&E their contract amount. In considering VEC in the time since the 2021 Decision, PG&E's income-qualified program team has become less clear on the need for VEC, in part due to identifying other products in the general market EE space, such as an Energy Action Guide, as well as ESA energy education materials that potentially may fill the same need. Due to the lack of a clear need for the VEC concept at this time, PG&E has canceled this pilot.[61]

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

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

D.21-06-015[62] established the mandate for implementing the ESA WG with a list of required tasks and actions. D.22-12-029 added the CARE/FERA Post-Enrollment Verification (PEV) SWG to expand the SWGs from three to four for PY 2023:

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

In addition to the SWGs, an ESA WG Council performed the following functions in 2023:

- Oversaw ESA WG and SWGs,
- Addressed cross-cutting program concerns beyond the ESA program,
- Coordinated activity with ESA/CARE Study WG,

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[61] VEC Pilot total authorized budget was $1.3M, ($325K annually, 2021-2024. Cycle to date spend is $-563; PG&E incurred $76,562 in 2021, $152,563 in 2022, and a refund credit of $-229,688 in 2023 when the implementer contract was cancelled. Any unspent funds after 2024 will either be used to off-set collection or carry forward for pilots, as highlighted in ESA Table 14.

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

- Managed the Response-to-Recommendation (RTR) process, and
- Managed the Facilitation Team.
    - The initial ESA WG facilitation team transitioned out of the role in Q4 2023, as a new facilitation team was on-boarded to provide facilitation support, with the current facilitator's budget and contract expiring at the end of 2024.

All ESA WG meeting materials, notes, and actions are posted to the CPUC public site for public access (https://pda.energydataweb.com).[63]

1.10.2. What were the accomplishments of each WG and SWG in the 2023 PY?

2023 ESA WG:
In 2023, the ESA WG retained seven non-IOU members, comprised of contractors and non-profit organizations. In addition, the ESA WG completed seven statewide public meetings throughout 2023 to engage ESA WG IOUs, non-IOUs member organizations, and the public.

2023 ESA Program Cost-Effectiveness SWG (CE SWG):
From February 2022 to March 2023, the CE SWG met to discuss the cost-effectiveness guidelines presented in D.21-06-015.[64] The CE SWG reviewed proposals for modifications to the guidelines and discussed issues related to the cost-effectiveness inputs and tests. In March 2023, SDG&E, on behalf of the IOUs, served the progress report to all parties on the service list for A.19-11-003, et al.[65], and the CE SWG was concluded in PY 2023. The progress report contains WG discussion summary and recommendations, which will be used to inform current ESA program implementation and future program design considerations.

2023 ESA Program Policy and Procedures (PP) and Installation Standards (IS) Manual SWG (PP&IS SWG):
The Policies and Procedures & PP&IS) SWG continued executing its core function throughout 2023 of incorporating timely updates to the PP&IS manuals to support program implementation. The SWG addressed issues related to the IOUs safety programs, and other contractor related issues. In addition, the SWG provided the IOUs with a streamlined mechanism for introducing, retiring, and modifying measures that provides transparency and efficiency in program operations.

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[63] Last accessed on April 26, 2024

[64] *Id*. at 250.

[65] https://pda.energydataweb.com/#!/documents/2783/view (last accessed on April 26, 2024)

2023 UAS SWG:
The UAS SWG concluded in 2022. While the SWG remained terminated in 2023, additional work related to a UAS was carried out by the CPUC, IOUs, and stakeholders via a Concurrent Application System (CAS) WG, convened pursuant to D.23-05-006, and established to develop the design requirement for CAS. In October 2023, the ED concluded CAS WG meetings for CAS Phase 1, and PG&E issued a RFP for Phase 1 of the CAS in December 2023, in accordance with the timeline established in D.23-05-006.[66]

2023 CARE/FERA PEV SWG:
The CARE/FERA SWG was initiated in February 2023 through the end of 2023. The SWG was tasked with exploring a wide range of issues and improvement opportunities related to PEV and recertification processes in the CARE and FERA programs, and forming consensus recommendations for future activities and program changes where possible. A detailed description of SWG activities and recommendations is provided in the Joint IOUs' Midcycle Progress Report (MCPR).[67] The SWG provided monthly updates during the ESA program public meetings, and overall recommendations from the IOUs were provided during the ESA program public meeting held on August 29, 2023.[68]

2023 ESA/CARE Study Working Group
The ESA/CARE Study Working was initiated in October 2021 to engage a collaborative group of stakeholders to review and plan research studies related to the ESA and CARE programs. In 2023, the WG met three times to discuss the following topics: Scope and budget review for the MFWB Process Evaluation and Non-Energy-Impacts Study; progress updates and deliverable review for the ESA/CARE Categorical Eligibility Study; evaluation budgets and planning for the rest of the program cycle.

1.10.3. What are some of the goals for each WG and SWG in PY 2024?

The ESA WG and Council are expected to be active for the duration of 2024. Some of the planned activities and goals include:

2024 ESA WG and Council:

- Continue regular meetings with stakeholders, ensuring all topics of interest and that are required by the CPUC are addressed.
- Provide a forum for the IOU's annual report summary meeting.
- Plan for wind-down activities, as the facilitators' contract expires at the end of PY 2024, and the IOUs' set aside budget for the ESA WG facilitation is expected to be exhausted by year end.

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[66] D.23-05-006 specifies that the CAS RFP must be released no later than December 29, 2023 and, within 220 of the RFP release date, the IOUs must submit a Tier 3 AL seeking approval of the bid selection and executed contract resulting from the CAS RFP, as well as the budget for CAS Phase I development related costs (recorded to date and forecasted through Phase I launch).

[67] IOUs' Joint ESA Midcycle Progress Report, Section 11, pages 75-80, located at https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M521/K879/521879638.PDF (Last accessed on April 26, 2024)

[68] https://pda.energydataweb.com/#!/documents/3836/view (Last accessed on April 26, 2024)

- Wrap up key learning and takeaways from the overall ESA WG experience, with respect to the need and value of continuing the ESA WG in future PYs, to help inform the IOUs' next program applications.

The ESA WG is expected to have one active SWG in PY 2024:

2024 Program Policy and Procedures (PP) and Installation Standards (IS) Manual SWG (PP&IS SWG)
The PP&IS SWG will focus on updating program manuals as needed and providing review and approval of new program measures throughout the next PY.

1.10.4. Cost Effectiveness SWG Progress Report Summary – PY 2023

As described in Section 1.10.2, the CE SWG issued its progress report in March 2023 which includes the SWG's key recommendations and activities.[69]

1.10.5. Midcycle Progress Report (MCPR) – PY 2023

In December 2023, SCE, on behalf of the Joint IOUs, timely filed the MCPR.[70] The MCPR did not propose any short-term program changes nor request the ED to take any immediate actions on the program recommendations. An excerpted list of key recommendations follows, with references to sections in the MCPR which further detail the recommendation:

- The IOUs do not recommend changes to Goals, Targets, or Budget at this time (See Section 2.9 of this report.)
- Currently, the IOUs do not recommend any new changes to the budget methodology for "carryover" funding. (See Section 2.7.1 of this report.)
- The IOUs do not recommend establishing goals for Health, Comfort, and Safety metrics at this juncture in the program cycle (see Section 3.4 of this report.)
- The IOUs recommend the Commission confirm that annual energy savings goals identified in Section 6.7.8.1 of D.21-06-015 remain an important performance indicator of cycle goal achievement, measured and reported annually, but only used cumulatively in the determination of overall program cycle (2021-2026) goals. (See Section 2.10 of this report.)
- The IOUs recommend including CE and Energy Savings Goals as a future discussion with the ESA WG with potential to adjust in the next program cycle. (See Section 4.3 of this report.)
- The IOUs recommend working with ED staff to identify the appropriate avenue to clarify the MF property definition such that the definition could adequately account for the diverse range of MF property types encountered by the MFWB program. (See Section 6.3 of this report.)

[69] https://pda.energydataweb.com/#!/documents/3836/view

[70] https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M521/K879/521879638.PDF (Last accessed on April 26, 2024)

1.11. Annual Public ESA-CARE Meeting

PG&E and the other IOUs held a public forum remotely via Microsoft Teams during the July ESA WG Monthly Meeting on July 29, 2023.[71] The IOUs presented an overview of their 2023 ESA Main, ESA CAM, MFWB, CARE and FERA results, highlighting outcomes and lessons learned from 2023 that are applicable to 2024 and future PYs. The public meeting provided an opportunity for stakeholder questions and discussion.

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

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

Introduction and Methodology

PG&E has contracted with Res-Intel, a residential property benchmarking consultant, since 2020, to report on the number of MF properties and the characteristics of income-qualified residents residing at those properties for the PG&E service territory. Residents are classified as income-qualified if they are currently enrolled in ESA or if a predictive model classifies them as ESA eligible. The model generates a predicted number of ESA eligible residents per property based on a number of property-level variables. These variables include property value and location, current ESA participation[72], and those assigned at the census block level, such as median income, ethnicity, and average household size.

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

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

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

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

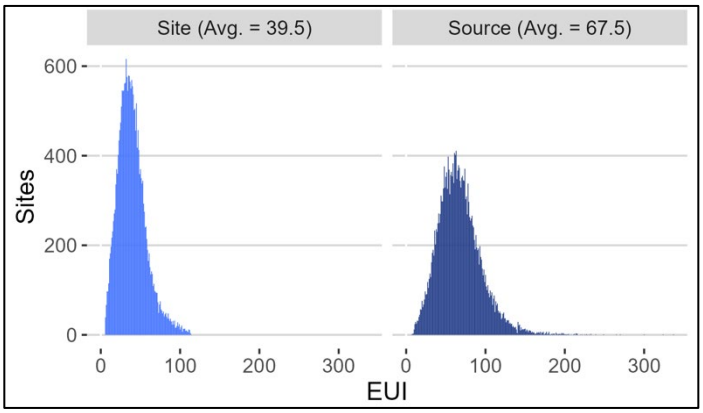
The analysis also disaggregates common area and tenant energy consumption. This disaggregation is achieved by classification of each meter using its available metadata. The indicator of whether a PG&E meter is assigned to common area is the dwelling type field that appears for each service point record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

Previous versions of this analysis can be found in the PY 2020, PY 2021, and PY 2022 ESA Annual Report. Results contained in the current analysis are based on properties and meters identified in the PY 2022 property inventory. However, the analysis uses updated ESA eligibility data, updated Acxiom customer demographic data, and updated interval data covering the years 2022 and 2023.

Results

Figure 1.12.1.1 shows distribution of Site and Source EUI for the 23,251 attached MF 5+ sites that meet the criteria for benchmarking. Results from a prior analysis found that benchmarked sites had an average Site EUI of 40 and Source EUI of 68. Current results include only attached MF 5+ properties.

Figure 1.12.1.1: PY 2023 - Distribution of EUI



Tables 1.12.1.1 and 1.12.1.2 compare PY 2023 ESA eligibility estimates (Table 1.12.1.1) with estimates from the PY 2022 analysis (Table 1.12.1.2). The estimates in these tables account for both actual and predicted ESA eligibility.

ESA Table 1.12.1.1
Estimates of ESA Eligibility, All 5+ Unit Attached Multifamily (PY 2023)

	Deed Restricted			Non-Deed Restricted		
Eligible %	**Properties**	**Buildings**	**Units**	**Properties**	**Buildings**	**Units**
Less than 50	880	4,560	106,605	17,345	37,167	547,082
50 to 64	204	1,195	20,163	3,084	6,108	61,492
65 to 79	316	1,555	28,383	1,608	3,521	35,983
80+	1,107	5,289	73,185	3,940	8,923	81,360
Unknown	267	1,314	20,189	1,425	3,536	52,049
Total	**2,774**	**13,913**	**248,525**	**27,402**	**59,255**	**777,966**

ESA Table 1.12.1.2 Estimates of ESA Eligibility, All 5+ Unit Attached Multifamily (PY 2022)						
	Deed Restricted			Non-Deed Restricted		
Eligible %	**Properties**	**Buildings**	**Units**	**Properties**	**Buildings**	**Units**
Less than 50	867	4,478	104,760	15,764	33,514	507,083
50 to 64	148	958	14,312	3,581	8,086	86,589
65 to 79	240	1,274	22,158	2,215	5,331	54,508
80+	1,252	5,889	87,106	4,417	8,788	77,737
Unknown	267	1,314	20,189	1,425	3,536	52,049
Total	**2,774**	**13,913**	**248,525**	**27,402**	**59,255**	**777,966**

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

Table 1.12.1.3 ESA Eligibility, Actual and Predicted (PY2023)						
	Deed Restricted			Non-Deed Restricted		
Eligible %	**Properties**	**Buildings**	**Units**	**Properties**	**Buildings**	**Units**
Less than 50	957 (-77)	5,120 (-560)	114,099 (-7,494)	18,242 (-897)	39,773 (-2606)	577,264 (-30,182)
50 to 64	266 (-62)	1,385 (-190)	22,816 (-2,653)	3,593 (-509)	7,689 (-1,581)	76,490 (-14,998)
65 to 79	458 (-142)	2,350 (-795)	38,087 (-9,704)	1,893 (-285)	4,709 (-1,188)	43,433 (-7,450)
80+	826 (281)	3,744 (1,545)	53,334 (19,851)	2,249 (1,691)	3,548 (5,375)	28,730 (52,630)
Unknown	267	1,314	20,189	1,425	3,536	52,049
Total	**2,774**	**13,913**	**248,525**	**27,402**	**59,255**	**777,966**

Tables 1.12.1.4 through 1.12.1.8 report statistics for the subset of Non-Deed Restricted (NDR) properties with 80+ percent eligibility. This subset includes 3,940 of the 5+ unit attached MF properties. Note that the total numbers of properties reported in Tables 1.12.1.4 and 1.12.1.5 are slightly less than 3,940 (as shown in Table 1.12.1.1) because three properties lack daily usage data. Differences between the results presented in Tables 1.12.1.4 and 1.12.1.5 and their counterparts in the PY 2022 analysis can be explained by the following factors:

1. Updated ESA-eligibility analysis using the following updated data sources:
   a. CARE-enrollment data.
   b. ESA installation data.
   c. Acxiom household demographic data.
2. Yearly variation in electricity and gas usage.

ESA Table 1.12.1.4 Total PY Annual Electricity Usage, 80+ Non-Deed Restricted (MWh)*						
Category	**Number of Properties**	**Average Sq. Ft.**	**Total 2023 Annual MWh Consumption**	**Total 2023 Annual MWh for Common Areas**	**Total 2023 MWh for Units**	**Total 2023 Annual MWh for Master Meters**
Sq. Ft. <99,999	3,835	13,958	249,218	11,835	237,383	2,076
Sq. Ft. >100,000	102	181,047	77,757	3,107	74,650	590
Total	**3,937**	**18,287**	**326,975**	**14,942**	**312,033**	**2,666**
*Annual sq. ft. totals averaged over January through December 2023. All other values are annual cumulative values.						

Overall, PY 2023 results are comparable to those from PY 2022 when adjusting for the number of properties and average square footage:

- The total number of properties decreased to 3,937, compared to 4,415 in the PY 2022 analysis (a decrease of roughly 11%).
- Average property size is up to 18,287 square feet, compared to 15,802 square feet for PY 2022.
- Total annual MWh consumption for the 80+ NDR sites is about 5.4% lower compared to PY 2022.
- Total annual gas consumption for the 80+ NDR sites is about 16% lower compared to PY 2022.

ESA Table 1.12.1.5 Total PY Annual Gas Usage, 80+ Non-Deed Restricted (therms)*						
Category	**Number of Properties**	**Average Sq. Ft.**	**Total 2023 Annual Therms Consumption**	**Total 2023 Annual Therms for Common Areas**	**Total 2023 Therms for Units**	**Total 2023 Annual Therms for Master Meters**
Sq. Ft. <99,999	3,835	13,958	11,123,827	3,327,047	7,796,780	3,149,444
Sq. Ft. >100,000	102	181,047	3,796,513	430,923	3,365,590	1,352,617
Total	**3,937**	**18,287**	**14,920,340**	**3,757,970**	**11,162,370**	**4,502,061**
*Annual sq. ft. totals averaged over January through December 2023. All other values are annual cumulative values.						

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

ESA Table 1.12.1.6 Average PY 2023 Energy Use Intensity (EUI), 80+ Non-Deed Restricted kBTU sq/ft			
PG&E Service	**# of Properties**	**EUI (Average)**	**EUI (Median)**
Dual Fuel	3,274	51.8	45.3
Electric Only	283	23.5	21.6
Gas Only	380	29.9	31.4

ESA Table 1.12.1.7 Year of ESA Treatment, 80+ Non-Deed Restricted (as of 2023)*		
ESA Treatment Year	**# of Properties**	**# of Units**
2003	215	785
2004	359	1,461
2005	448	1,999
2006	481	2,327
2007	403	2,274
2008	419	1,806
2009	485	2,404
2010	708	2,544
2011	688	3,329
2012	723	2,741
2013	886	3,677
2014	958	4,020
2015	774	2,578
2016	539	1,765
2017	556	2,116
2018	624	2,582
2019	955	3,707
2020	766	2,294
2021	720	1,963
2022	320	1,613
2023	**209**	**1,195**

ESA Table 1.12.1.8 Year of Most Recent Renovation, 80+ Non-Deed Restricted*		
Most Recent Renovation	**# of Properties**	**# of Units**
(1940,1990]	3	60
(1990,2000]	7	277
(2000,2010]	27	2,547
2010+	33	2,446
None Recorded	3,525	66,531
*Renovation records were retrieved from CoStar and do not account for all properties.		

PG&E's N. MFWB program serves both deed and non-deed restricted MF properties that meet the program eligibility requirements. PG&E did not complete any treatments for MF whole building properties in PY 2023, as the MF-CAM Initiative ended in 2022 and the N. MFWB program launched in July 2023 and ramped up throughout the second half of the year, focusing on enrollments and audits. However, PG&E's N. MFWB program treated 3,468 MF in-units in 2023 (See ESA Table 1.1.1.3 of this report); this figure combines both market-rate and deed-restricted properties.

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

PG&E's N. MFWB program treated 3,468 MF in-units and delivered 499,498 kWh and 36,303 in therms savings. The program also enrolled 140, and audited 47, whole building projects in 2023.

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

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

PG&E contracted with Demand Side Analytics to conduct a NMEC analysis for properties treated through the MF-CAM Initiative. The analysis requires 12 months of metered consumption data, prior to as well as after measure installation. As such, the analysis is conducted for properties treated between January 2022 and December 2022, with a minimum of 12 months of post-installation consumption data by the end of PY 2023.

24 properties treated by the MF-CAM Initiative meet this requirement, with 23 sites reporting 937 MWh of deemed electric savings and 20 sites reporting 55,618 therms of deemed gas savings. There is a large overlap between the projects with gas and electric savings due to interactive effects, resulting from measures such as interior lighting upgrades. In fact, 43% of the program's electric savings are generated from LED interior lighting (Table 1.12.3.1).

ESA Table 1.12.3.1
Deemed Savings

Measure Type	Deemed Savings (MWh)	Deemed Savings (Therms)
LED Interior Lighting	400	-6,918
LED Exterior Lighting	510	--
Heating & Cooling	27	30,702
Water Heater	0	31,789
Other	0	44
Total	**937**	**55,618**

A site-level NMEC analysis is applied to 20 electric sites and 17 gas sites, where the respective meters can be successfully mapped. Energy saving estimates are generated through six steps:

1. Identify a control group of MF common areas that did not participate in the program. This candidate control pool is composed of approximately 2,000 sites.

2. Generate indexes of hourly energy use for the average MF common area. These were developed separately for electric and gas using the control pool customers. For electric, the profiles were developed by summer load shape and climate region.[73] For gas, the profiles were developed exclusively by climate region.
3. Use data from the pre-intervention period to develop a model of energy use. This is modelled as a function of temperature, hour of week, season, occupancy, and indexes of hourly energy use.
4. Apply the model to the pre-intervention period to generate uncertainty statistics. This allows for customers that are not highly predictable to be removed from the analysis to ensure confidence in portfolio-level performance.
5. Apply the model to the post-intervention period to produce a baseline.
6. Estimate savings as the difference between baseline and actual energy use during the period when the EE intervention was in place.

This process is applied to both electric and gas participants. Overall, electric participants generate a realization rate[74] of 1%[75], and gas participants generate a 66% realization rate. There are 13 electric sites and five gas sites that claim more savings than they use in a year. While most of these sites still generate observable savings, the portfolio-level realization rate may be artificially low due to discrepancy in either the claimed savings or the mapped meters. Figure 1.12.3.1 shows how these realization rates change if the analysis is limited to sites where the annual usage is greater than deemed savings. After applying this filter, the realization rates for electric and gas savings are 12% and 95%, respectively.[76]

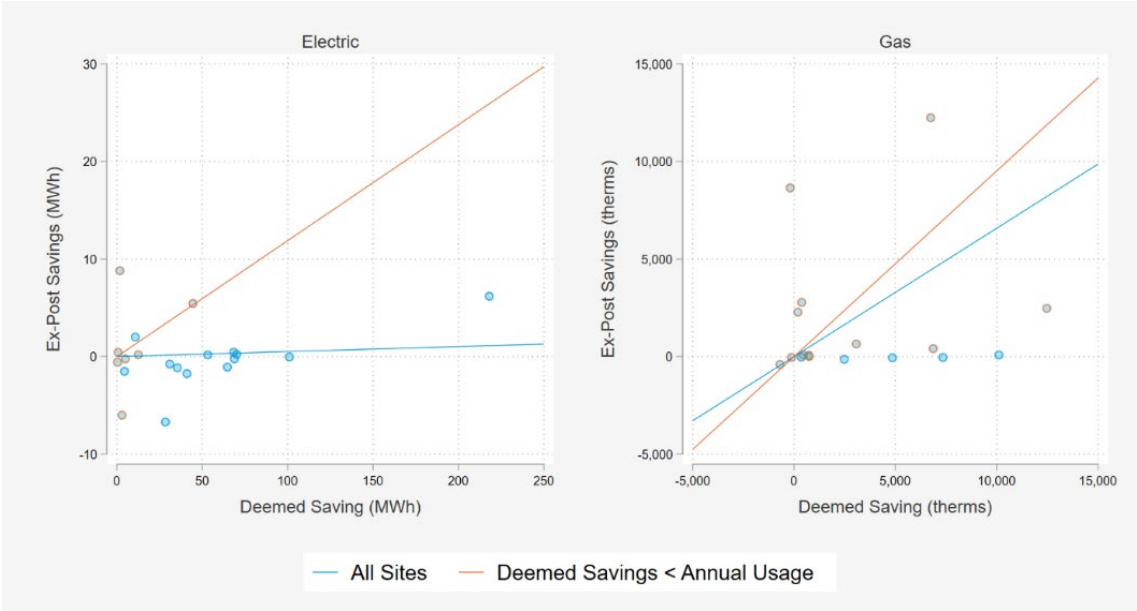
[73] Inland, coastal, north central, and south central.

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

[75] The low realization rate may be due to a combination of these factors PG&E has observed: 1) Low signal-to-noise ratio for the type of measures installed, which is not ideal for NMEC analysis (a minimum of 10% is recommended); 2) Small number of participant sites resulting in less robust analysis and results; 3) MF-CAM electric measures consisted of residential lighting with less consistent usage patterns (when compared to commercial lighting); 4) Potential mismatched and/or missing meters linked to treatment interventions; 5) Deemed saving estimates may be too high compared to actual savings.

[76] These realization rates correspond to seven electric and 12 gas sites.

ESA Figure 1.12.3.1 – Realization Rate Comparison[77]



Results and Recommendations

Table 1.12.3.2 details the savings for the sites that pass the uncertainty screen, which removes customers with a coefficient of the variation of the root mean square error (CVRMSE)[78] of greater than one during the year prior to efficiency installation. Overall, electric and gas savings are estimated to be 0.5% and 21.8% of annual energy consumption, respectively. These saving figures correspond to 19 electric and 13 gas sites that pass this CVRMSE screen. As described above, the electric and gas realization rates for this group of sites are 1% and 66%.

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

1. Map meters associated with the EE measures during installation, and monitor data generated from these meters during post-installation.
2. Use out-of-sample (OOS)[79] metrics to evaluate performance.
3. Include a control group to control for exogenous effects.
4. Screen all sites for:
    a) Appropriate meter mapping.
    b) Signal-to-noise ratios[80] (ideally between 10% and 100%).
    c) OOS accuracy.
    d) Non-routine events.[81]

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

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

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

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

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

ESA Table 1.12.3.2 Overall Program Savings[82]										
Install Month	Electric Savings (MWh)					Gas Savings (Therms)				
	Site Count	Deemed	Ex-Post	CVRMSE	% Savings	Site Count	Deemed	Ex-Post	CVRMSE	% Savings
Apr	1	69	-0.2	0.42	-22.1%	2	1,477	65	0.64	2.5
May	1	53	0.2	0.40	4.7%	1	465	73	0.96	5.8
Jun	1	1	0.4	0.26	6.6%	1	6,742	12,245	0.26	32.3
Jul	1	13	0.2	0.54	-24.8%	0	-	-	-	-
Aug	8	151	-0.4	0.19	-0.2%	3	10,301	11,506	0.40	35.2
Sep	7	476	3.8	0.57	0.7%	6	21,632	2,832	0.57	5.9
TOTAL	**19**	**762**	**3.9**	**0.37**	**0.5%**	**13**	**40,617**	**26,721**	**0.55**	**21.8%**

[82] Program savings were calculated for April through September 2022, as no properties were treated during the other months.

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

2023 California Alternate Rates for Energy (CARE) Program | Summary of Results and Program Highlights

In 2023, PG&E estimated that 1,402,162 customers were eligible for the CARE discount. By the end of 2023, PG&E had enrolled 1,402,942 or 100% of the total eligible population within its service territory into the CARE program, including 274,291 new enrollments. 2023's enrollment represents an overall net decrease of 66,782 CARE customers from 2022's enrollment of 1,469,724. Participating households in 2023 received average monthly bill discounts of approximately $53 for electric and $15 for gas.

CARE Program Summary Table 2 provides a summary of PY 2023 program expenditures and activities.

CARE Summary Table 2 2023 CARE Program Summary			
2023	**Authorized Budget**	**Actual**	**%**
Administrative Expenses	$13,961,600	$9,534,834	68%
Subsidies and Benefits	$691,973,000	$978,126,461	141%
Total Program Costs and Discounts	**$705,934,600**	**$987,661,295**	**140%**
2023 CARE New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc.**	**Self-Certified as Categorically Eligible**	**Self-Certified as Income Eligible**
By Method	16,090	258,201	668,402
2023 CARE Enrollment	**Estimated Eligible Participants**	**Participants**	**Enrollment Rate**
Total Enrolled	1,402,162	1,402,942	100%

PG&E's primary activities in 2023 for CARE centered around improvement of program processes for PEV and recertification, and continuing efforts to enroll hard-to-reach customers. While the program has high overall enrollment, pockets of the service territory continue to have ZIP Codes with relatively low enrollment. PG&E's strategy for enrolling hard-to-reach customers continued to include marketing in DACs and rural areas, and continuing the CBO ME&O pilot until mid-year 2023.

The CARE program's noteworthy marketing, outreach, and administrative initiatives and achievements in 2023 included:

- Increased efficiency and streamlining implemented for administrative tasks resulted in a 14% reduction in overall program administration costs between PY 2023 and PY 2022, and this outcome was achieved while PG&E processed ~50K more new enrollments and similar numbers of PEV and recertifications (the main administrative tasks for the program) in PY 2023.
- Launched a new CARE Welcome Journey that resulted in increased customer engagement and enrollment in complementary programs.
- Rebuilt the CARE Acquisition Propensity Model and developed a new CARE Eligibility Score to enhance targeting capabilities.
- Coordinated with the DAC-SASH program administrator, GRID Alternatives, to auto-enroll DAC-SASH referrals directly into CARE or FERA.

- Adjusted the Recertification Reminder and implemented a new text reminder with the aim of encouraging last minute customer recertification.
- Deployed a third-party to conduct customer research on PEV processes and pain points, enabling PG&E to utilize the customer research report to focus its PEV efforts to areas that will be most impactful to customers.

CARE Program Activities Supporting Environmental and Social Justice (ESJ)
Similar to the discussion in the ESA program's 2023 Summary of Results and Program Highlights, PG&E considers the needs of ESJ communities and has prioritized their inclusion in the CARE (and FERA) programs to the extent possible, thereby advancing and supporting the intent of the Commission's ESJ Action Plan.[83] In 2023, some of the key ways that PG&E's CARE (and FERA) programs incorporated and advanced the goals of the ESJ Action Plan included:

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

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

D.21-06-015 authorized PG&E's CARE administrative and subsidy budgets for PYs 2021-2026, and sets a CARE enrollment goal of at least 93% in PG&E's service territory for these PYs.[84]

2.1. Participant Information

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

The total number of residential CARE customers, including sub-metered tenants, is included in Appendix A of this report: CARE Table 8 – CARE Participants as of Month-End. During the 2023 PY, no monthly variances of 5% or more occurred.

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[83] CPUC Environmental and Social Justice Action Plan (February 21, 2019) Retrievable at https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M263/K673/263673090.PDF; 2.0 version released March 2022. Retrievable at 465846599.pdf (ca.gov). (Last accessed on April 26, 2024.)

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

CARE Table 2.1.1 2023 Residential CARE Program[a]					
Electric Customers by Month			Gas Customers by Month		
PY 2023	CARE Customers	Percentage Change	PY 2023	CARE Customers	Percentage Change
January	1,282,934	n/a	January	1,100,395	n/a
February	1,257,629	-2%	February	1,080,662	-2%
March	1,255,906	0%	March	1,080,009	0%
April	1,249,021	-1%	April	1,078,888	0%
May	1,242,189	-1%	May	1,075,837	0%
June	1,230,789	-1%	June	1,066,788	-1%
July	1,228,988	0%	July	1,064,965	0%
August	1,235,025	0%	August	1,069,242	0%
September	1,229,557	0%	September	1,064,069	0%
October	1,224,481	0%	October	1,060,486	0%
November	1,222,870	0%	November	1,058,692	0%
December	1,222,372	0%	December	1,057,643	0%

[a] Due to the timing of collection of CARE enrollment data, numbers throughout this report may vary slightly based on reporting timeframe for each monthly report throughout the year.

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

PG&E used the joint utility methodology adopted in D.01-03-028 for developing monthly enrollment estimates by energy source in 2023.[85] This methodology entails annual estimation of eligibility for CARE, ESA, FERA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

Sources for the 2023 eligibility estimates included the January 2023 Health and Human Services (HHS) Federal Poverty Guidelines (FPG)[86] ("bundling" one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327), current year small area vendor marginal distributions on household characteristics, Census 2020 Summary File 3 (SF3) data, Census American Community Survey (ACS) 2018-2022 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources.

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

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

[86] Federal Register/Vol. 88, No. 12/January 19, 2023/Notices; p.3424.

Estimates from the block group level are aggregated to county/utility and whole utility level, among other aggregations. Annually, PG&E applies county/utility level eligibility fractions to a new set of "technical eligibility counts" (for CARE, these are metered and sub-metered occupied housing units) to obtain an estimate of income/demographic eligibility in household count form.

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

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

The joint utility methodology, as described in Section 2.1.2 of this report, was used throughout 2023.

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

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

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

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

2.1.2.4. Describe how current CARE customers were counted.

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

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

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

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

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

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

Electric and Gas:	24.1%
Electric-only:	28.9%
Gas-only:	26.8%

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

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

Electric:	39,166
Gas:	28,285

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

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

Electric:	21,333
Gas:	15,729

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

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

Electric:	54%
Gas:	56%

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

Challenges encountered in 2023 for sub-metered tenants and/or master-meter customers are described below, along with mitigation and improvement efforts to help address issues.

Mobile Home Park (MHP) Property Manager Communication

PG&E continues to advertise the CARE program for eligible tenants of sub-metered residential facilities, and mails information packets containing program applications to Mobile Home Park (MHP) landlords/property managers on an annual basis. However, PG&E consistently receives returned and undelivered envelopes, likely due to the high turnover of landlords/property managers. In situations where PG&E did receive notice of new landlords/property managers, PG&E onboarded them by providing CARE program information and worked with them to transfer existing CARE certified tenant data to new accounts.

PG&E provides a monthly CARE certification report to landlords/property managers and requests landlords/property managers to contact PG&E with updated information. Despite this outreach, some landlords/property managers failed to notify PG&E when a CARE-certified tenant moved out of the facility. To reduce this problem, PG&E provides detailed instructions on the certification report cover letter that requested that the landlords/property managers notify PG&E in writing, via email or fax, if certified tenants moved out.

To improve the landlord/property managers' CARE program experience and address some of the aforementioned issues, in April 2023, PG&E implemented a submeter portal that created a self-service process for landlord/property managers to access monthly certification reports, create daily requests such as tenant enrollments/tenant drops, and contact the CARE team for any submeter related questions. Throughout 2023, PG&E onboarded 129 landlord/property managers with this submeter portal, encompassing 160 MHPs. PG&E plans to continue optimizing the portal processes and features, and expanding access and training to support more landlords/property managers in accessing helpful CARE program tools.

In Q3-Q4 2023, PG&E received some questions from landlord/property managers about the solar billing plan. PG&E'S CARE Operations team referred these questions to PG&E's Rates team so that they could provide detailed support to landlords/property managers.

Tenant Billing

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

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

Some of the billing challenges described in Section 2.1.7 were ongoing due to the nature of the billing for MHP metering. MHP metering conversions to single individual metering for tenants can help address these issues, as each tenant would then be the customer of record for their account and would be responsible for reviewing and paying their bill. PG&E has undertaken converting mobile home sub-metering to direct utility-served customers in recent years by increasing outreach to landlords/property managers and improving customer support.

In 2023, PG&E's CARE Operations team continued a daily review of sub-meter to residential meters to further support tenants in maintaining their CARE status as they transitioned. In total, 224 MHPs have transitioned from sub-metered to direct metering, of which 195 have been fully converted, and 29 have been partially converted. However, there are challenges and barriers to expanding MHP conversion from sub-metering to direct metering for the 987 MHPs that remain master-metered, primarily because PG&E is not authorized to mandate these conversions.

2.2. CARE Budget Summary

2.2.1. Please provide CARE program summary costs.

CARE Table 2.2.1
2023 CARE Program Summary Costs

CARE Budget Categories	2023 Authorized Budget [a]	2023 Actual Expenses	% of Budget Spent
Outreach	$7,425,487	$4,469,503	60%
Processing, Certification, Recertification	$869,400	$525,910	60%
Post-Enrollment Verification [b]	$1,660,721	$1,660,721	100%
IT Technology/Programming [c]	$1,537,192	$1,537,192	100%
Community Help and Awareness of Natural Gas and Electric Services Program (CHANGES) Program	$525,000	$192,591	37%
Studies and Pilots	$25,000	$22,976	92%
Measurement and Evaluation	$200,000	$141,295	71%
Regulatory Compliance	$380,500	$234,877	62%
General Administration	$1,165,300	$669,581	57%
CPUC ED Staff	$173,000	$80,188	46%
Total Expenses	**$13,961,600**	**$9,534,834**	**68%**
Subsidies and Benefits	$691,973,000	$978,126,461	141%
Total Program Costs and Discounts	**$705,934,600**	**$987,661,295**	**140%**

[a] D.21-06-015 approved the CARE program budget for PYs 2021-2026.
[b] Post-Enrollment Verification budget reflects fund shift $147,821 from the Outreach category in according to fund shifting guidelines in D.12-08-044, as updated in D.16-11-022, D.17-12-009 and D.21-06-015.
[c] Information Technology (IT) programming budget reflects fund shift $413,892 from the Outreach category in according to fund shifting guidelines in D.12-08-044, as updated in D.16-11-022, D.17-12-009 and D.21-06-015.

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

CARE Table 2.2.2
2023 CARE Program Enrollment

Participants Enrolled	Estimated Eligible Participants	Enrollment Rate	Target Met?[a]
1,402,942	1,402,162	100%	Yes

[a] Attachment 1, Table 1 of D.21-06-015 sets a 93% enrollment goal for PY 2023 for PG&E.

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

Because recertification and PEV processes are similar in that they determine whether a customer will remain on CARE or be removed, PG&E includes a description of the recertification complaints and PEV complaints for transparency and stakeholder awareness.

Over the course of 2023, one recertification complaint was received from a customer having difficulty submitting their CARE recertification documentation. The customer was provided instructions on how to submit the required forms.

In 2023, PG&E received 25 complaints/inquiries related to PEV, generally related to notifications customers received of incomplete income documents, customers requesting a new PEV application, and/or customers inquiring about their PEV status or questioning their program removal. In all cases of program removal, customers had either failed to submit documentation or provided incomplete documentation, and PG&E contacted them to support resubmittal where appropriate. The CARE discount was either reinstated for customers who completed PEV, or they were removed if they did not respond or were no longer qualified.

2.3. CARE Program Costs

2.3.1. Discount Cost

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

PG&E's average monthly CARE discount received in 2023, in dollars, per CARE customer are shown here by energy source:

Average Monthly Electric Discount:	$52.78
Average Monthly Gas Discount:	$14.92

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

PG&E's annual subsidy in 2023 for all CARE customers are shown here by energy source:

Electric Subsidy:	$785,277,413
Gas Subsidy:	$192,849,048
Total:	$978,126,461

2.3.2. Administrative Cost

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

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

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

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

Processing, Certification and Recertification
This cost category includes:

- ME&O campaigns, such as direct mail, email, telemarketing, Automated Voice Response (AVR) systems, digital media and radio.
- Retention outreach.
- Printing of bill inserts, applications, advertising and promotional materials, annual notifications to sub-metered facilities, and other CARE program materials.
- Postage and handling fees.
- Purchase and storage of promotional items, other goods, and supplies.
- CARE toll-free line maintenance and operation, and PEV Outbound Call Pilot.
- Capitation fees to Community Outreach Contractors (COC)[87] for new CARE enrollments and assistance with the PEV process, community event costs, community outreach activities and partnerships with CBOs.
- Staff labor related to ME&O.
- Other expenses include travel, membership fees, sponsorships, conferences, catering, and other outreach-related costs.

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

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

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

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

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

IT Programming
This category includes:

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

Studies and Pilots
This cost category includes any pilot projects for the Community Help and Awareness of Natural Gas and Electric Service (CHANGES) program. For 2023, this included the reimbursement cost for the ongoing CHANGES program, as well as the CHANGES Evaluation and staff labor to support the program.

This cost category also includes any pilot projects or studies for the program. For 2023, this included costs for LINA study.

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

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

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

General Administration
This category includes:

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

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

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

At year-end 2023, the CARE electric balancing account was over-collected and reflected a year-end credit balance of $30,619,273. The CARE gas balancing account was under-collected and reflected a year-end debit balance of $33,216,731.

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

All CARE administrative cost categories as well as the revenue shortfall associated with the CARE discount are included in the CARE balancing account, not in base rates.[88]

[88] D.02-09-021.

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

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

2.4. Marketing, Education and Outreach

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

In 2023, PG&E continued CARE outreach efforts, leveraging successful strategies and tactics established in prior years' efforts. Marketing and outreach plans engaged customers across several channels such as digital media, email, and via CBOs to increase reach and awareness.

Additionally, PG&E rebuilt the CARE Acquisition Propensity Model and developed a new business-rule driven CARE "Eligibility Score," as an additional tool to refine targeting strategies. This is a new approach to targeting customers, different than using a model. The CARE Eligibility Score uses Acxiom and Athens data to identify customers who are more likely or more unlikely to qualify for CARE based on their household income and household size data. For customers without complete Acxiom data, Zip code level Athens Eligibility Rates were used for scoring. PG&E plans to evaluate how to best leverage the new CARE Eligibility Score for targeting in 2024.

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

2023 Highlights:

- Rebuilt the CARE Acquisition Propensity Model and developed a new CARE Eligibility Score to enhance targeting capabilities.
- Direct marketing campaigns drove over 16,000 CARE enrollments.
- Paid media campaigns delivered quality impressions to engage customers, with improved year-over-year CTR.
- Launched a new CARE/FERA Welcome Journey which drove customer engagement and enrollment in other financial support programs and tools.
- Adjustments made to Recertification Reminder communication timing and a new text reminder added to encourage last minute recertification.
- Conducted a third-party customer focus group to identify PEV barriers and identify opportunities to improve the PEV customer experience. PG&E will use feedback from the focus group to improve the PEV process.
- Implemented technology to send a real-time proactive email to customers regarding the receipt their PEV of documents. This approach is designed to address a pain point customers reported of lack of awareness if PG&E received their PEV documents.

Specific M&O campaigns are described as follows:

Model Update and Eligibility Score Summary

As part of the CARE model update in 2023, a two-solution approach was taken:

1. Rebuilt the CARE Acquisition Propensity Model, with the target variable being "likely to enroll in CARE."
2. Developed a business-rules driven "Eligibility Score," which uses Acxiom and Athens data to isolate customers that do or do not appear to be eligible for CARE.

PG&E developed the business-rule driven CARE "Eligibility Score," as an additional tool to refine targeting strategies. While the Acquisition Propensity model employs statistical algorithms and predictive analytics to gauge a customer's likelihood to enroll in CARE based on past interactions and demographic insights, the CARE Eligibility Score leverages predefined business rules to target customers who appear to be eligible for CARE based solely on the demographic data available (Acxiom household income and household size data). For customers without complete Acxiom data, Zip code level Athens Eligibility Rates were used for the Eligibility scores.

The association between enrollment and Eligibility Score demonstrates how the score can be used for different audience selection needs. For example, as shown in Table 2.4.1 below, customers in the green segments, high score plus unenrolled, could be strong candidates to be included in CARE acquisition campaigns. In contrast, customers in the red segments, who have a low Eligibility score but are CARE-enrolled, could be ideal candidates to include in PEV efforts. In November 2023, the CARE Auto-Recertification process was updated to leverage the Eligibility Score. The top 20% of eligible customers scheduled to recertify each month are automatically recertified.

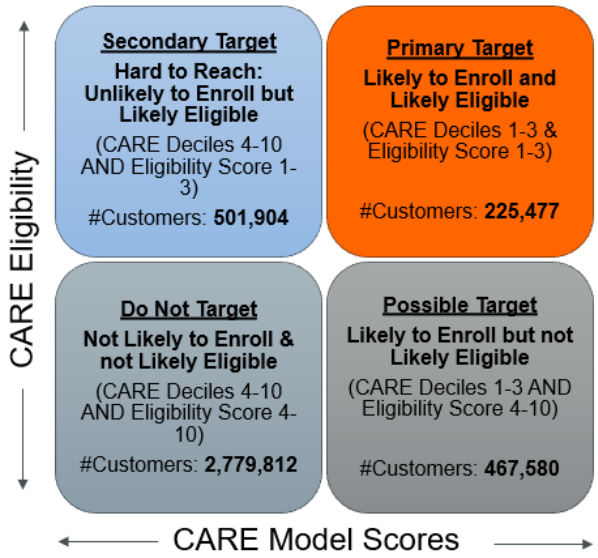
In December 2023, the CARE PEV process was also updated to leverage the Eligibility Score. The customers who have a low Eligibility Score but are CARE enrolled are selected for PEV, at an approximate rate of 7% annually. In addition, PG&E continues to select approximately 1% of enrolled customers randomly for PEV, as well as follow the guidelines for HU PEV selection.

CARE Table 2.4.1 Distribution of CARE Enrolled vs. Non-CARE Enrolled customers by CARE Eligibility Score						
CARE Eligibility Score[a]	**CARE Enrolled**		**Non-CARE Enrolled**		**Total**	
1	154,570	11.2%	167,213	4.2%	321,783	6.0%
2	183,991	13.4%	241,812	6.1%	425,803	8.0%
3	240,533	17.5%	318,356	8.0%	558,889	10.4%
4	176,374	12.8%	337,353	8.5%	513,727	9.6%
5	109,774	8.0%	266,899	6.7%	376,673	7.0%
6	142,206	10.3%	430,936	10.8%	573,142	10.7%
7	111,744	8.1%	437,768	11.0%	549,512	10.3%
8	67,099	4.9%	361,942	9.1%	429,041	8.0%
9	80,573	5.9%	405,613	10.2%	486,186	9.1%
10	110,051	8.0%	1,006,881	25.3%	1,116,932	20.9%
Total	**1,376,915**	**100.0%**	**3,974,773**	**100.0%**	**5,351,688**	**100.0%**

[a] CARE Eligibility Score: 1– Most eligible; 10- Least eligible

Unenrolled customers can also be targeted using CARE Eligibility Score in conjunction with the CARE Propensity Model scores for greater targeting specificity as shown below in Figure 2.4.1.

Figure 2.4.1 - CARE Eligibility x CARE Model Score Matrix



Base: Non-CARE enrolled universe – 3.97MM

Direct Marketing

In 2023, PG&E sent email messages promoting CARE to more than 285,000 customers which generated over 11,000 new enrollments. The Never Targeted acquisition campaign strategy sent emails monthly to customers in top deciles of the CARE propensity model[89] who had not received previous campaign messages. Customers received a series of up to three messages with a new audience starting the campaign journey each month.

PG&E began frequency testing mid-year within the Never Targeted campaign to look for opportunities to improve the enrollment rate. For the CARE email campaign, half of the customers received three communications with a one-month cadence, and the other half received the same three emails but with a three-month cadence.

Overall, no statistically significant difference was found between the two cadence groups at driving FERA or CARE enrollments for customers who received the CARE emails. However, the result differed for customers receiving FERA communications. See discussion in 4.3.1 Direct Marketing section.

In addition to the monthly Never Targeted acquisition campaign, PG&E deployed quarterly campaigns targeted to customers who failed to recertify for CARE. PG&E sent CARE messages to approximately 28,700 customers who did not recertify for CARE during 2023. The campaign drove over 1,500 re-enrollments in CARE.[90]

Paid Media Summary

PG&E launched the CARE digital campaign in January, investing approximately $297,000 over 2023. Google tactics Paid Search, Discovery and Performance Max ads ran as Always-On, across PG&E's territory.

Display and native advertising ran for two distinct four-month media flights in January through April and September through December. Both flights targeted 227 Rural and High Poverty Zip codes.

Over the course of the campaign, nearly 58M awareness-driving impressions were delivered, exceeding the annual campaign projection by 2%. A total of 765,821 Clicks were delivered with a strong 1.33% CTR that exceeded the historical 2022 1.21% CTR.

The digital campaign was paused from November 7 through November 14 due the new pge.com site redesign launch. The new site split the previously combined CARE/FERA landing page into two separate program pages. During the campaign pause, PG&E set up and test creative assets to redirect to the new CARE page on the site. The campaign was restarted on November 15.

The campaign delivered 623,304 visits to the landing page, exceeding campaign goal by 44% and exceeding the 2022 historical CARE landing page visits by 15%.

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[89] The CARE propensity model assigns customers a Decile score from 1 to 10, with one being the most likely to enroll in FERA and 10 being the least likely to enroll.

[90] Re-enrollment number is for the Q1-Q3 campaign results. Q4 campaign mailed in mid-December and final data is not ready at the time of writing.

Bill Inserts

PG&E continued to leverage bill inserts as an efficient tactic for generating program awareness and enrollment. In June, PG&E sent a bill insert to approximately 2M residential customers not already enrolled in CARE or FERA. The bill insert was bilingual in English and Spanish and included basic program information and the annual eligibility guidelines.

Retention Campaigns

PG&E is committed to supporting CARE retention for qualified customers and uses data-driven decision making to determine cadence and timing of messages, and expanded messaging channels, including text. In 2023, PG&E orchestrated two ongoing marketing campaigns targeted to enrolled customers.

Welcome Campaign

In March 2023, PG&E launched an enhanced Welcome campaign to improve the post-enrollment customer experience while increasing enrollments in other financial support programs.

The Welcome campaign included multi-channel, multi-touch communication targeting both newly enrolled and returning program participants through email, text, or direct mail. Communications were personalized with dynamic content including information about other relevant cost and energy saving programs based on specific customer data attributes and eligibility.

The multi-touch email campaign deployed daily to newly enrolled and re-enrolled customers, providing timely communication of the CARE program savings benefit, program guidelines and how to monitor bill savings each month to demonstrate the value of being enrolled.

Customers without a valid email received a single direct mail message. The direct mail is customized based on the customer's data attributes. Direct mail is deployed to enrolled customers on a weekly basis.

Customers with a valid mobile phone number also received an initial Welcome text message acknowledging their enrollment in the program and highlighting the percentage monthly energy savings based on their service agreement.

Analysis in 2023 of campaign engagement demonstrated that customers are overwhelmingly using their cell phones to access content on the PG&E website. Among the three tactics (direct mail, email and text message), text drove the highest number of total visits to PG&E websites. However, email generated the highest visit rate (12.8%) and unique visitors (+20,000). For email specifically, 83% of customers accessed the website on a mobile device rather than desktop. These results reflect the importance of multi-channel communications and ensuring communications are optimized for mobile viewing.

The second touch in the email campaign that highlights where to find CARE savings on the monthly bill, had the highest open and click rate. Re-enrolled customers had a click rate of almost 11% and newly enrolled CARE customers had a click rate of 15%, demonstrating the ongoing opportunity to engage enrolled customers.

The cross-promotion of other programs and tools in the Welcome campaign also had positive results. Click rates were highest for the LIHEAP and REACH programs, with a CTR of over 2% in the first Welcome touchpoint.

Recertification Reminder Campaign

PG&E continued the Recertification Reminder campaign with the objective of reducing attrition caused by customers' failure to recertify for CARE.

Each month, PG&E sent email notification to customers in Deciles 1 and 2 who were automatically recertified.[91] The communication alerted them that they were automatically re-enrolled and indicated no further action was required to continue to receive the CARE discount. The email encouraged the customer to check the current income guidelines to confirm continued eligibility and noted that the customer can opt-out of the program if they are no longer qualified.

Customers who were not automatically recertified were included in the Recertification Reminder campaign. Customers without a valid email address were sent direct mail notification at 90-days prior to the customer's CARE program end date.

Customers with a valid email address also received reminders via email notification. Email communication started at 120-days prior to program expiration date and continued with reminders at 90-days, 60-days and 30-days prior to the recertification date. The emails used visual cues such as color and animation, as well as messaging to create a growing sense of urgency, with a call-to-action to re-enroll before the program end date. PG&E continued testing incremental reminder messages through additional communication channels, including SMS/text message and outbound automated calls. As part of the ongoing test, a portion of customers received a call or a text message at 120-days and 30-days prior to the program end date.

Campaign analysis showed that there was minimal recertification activity around the 120-day mark. The hypothesis is that it is still too early for most customers to feel a sense of urgency about re-enrolling so they do not take action.

In looking at recertification rate for the test groups who received automated call and text reminders, there was no significant lift recorded. In comparing the CARE and FERA recertification rates, the CARE recertification rate[92] (56%) far surpasses the rate of re-enrollment for FERA (9%).

After reviewing the results of the channel testing, as well as the time to recertify analysis, several key changes were made to the Recertification Reminder campaign at the end of 2023 and going into 2024:

1) The 120-day email was eliminated, as few customers were enrolling at this time.
2) Subject line and message testing for the 90-day email are planned for 2024.
3) The robocall and text reminders will be moved up to the 90-day timeframe.
4) A new text reminder will be added to deploy seven days prior to program end date to encourage any "last minute" recertification.

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[91] The CARE Acquisition Propensity Model scores every residential PG&E customer and assigns them to a decile (1-10), with a decile 1 being most likely to enroll and 10 being least likely. Enrolled CARE customers with a decile score of 1 or 2 were automatically recertified. In November 2023, auto-recertification began using the top 20% of eligible customers each month based on Eligibility Score.

[92] CARE and FERA recertification rate through December 2023.

Earned Media

Throughout 2023, PG&E's income-qualified programs garnered several earned media stories, across general market and multicultural media outlets. Coverage included live and pre-recorded radio interviews and programming for stations such as:

- **Radio Bilingue (Central Valley):** non-profit public radio network offering public radio programming in Spanish language covering the Central Valley.
- **KBTV Crossings TV (Sacramento):** digital channel covering the Central Valley that provides in-language news, information and entertainment programming for seven Asian language groups.
- **KVTO – Sing Tao Radio:** offers programs in both Mandarin and Cantonese, with an audience of approximately 182,000 in the San Francisco Bay Area.
- **Skylink TV:** local Chinese TV station with the strongest over-the-air signal in San Francisco, with daily viewership in the in the Bay Area of approximately 100,000.

Outbound Financial Assistance

In 2023, PG&E continued outbound case management calls to reach customers with past due amounts. The case management calls provided customers with flexible payment plans as well as information about CARE, FERA, MBL, and other partner agency assistance programs such as LIHEAP. Customers who were deemed to be eligible for a specific program were enrolled.

In 2023, PG&E CSRs able to make contact with 170,329 customers directly. The customers who could not be reached received a voicemail with information regarding financial assistance programs.

Before calling customers, CSRs ran a rate analysis for each customer and provided advice if those customers had the potential to save money on their bills by switching their rate plan or adding a program such as SmartRate. Customers with a past due balance were directed to LIHEAP where they received pledges totaling $748,433.

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

2023	Totals
Customers Called	170,329
Enrolled in CARE/FERA	6,568
LIHEAP Pledge Amounts	$748,433
Medical Baseline Enrollments	35,652

Community Outreach

Local Outreach

In 2023, PG&E's CSO Team attended 75 local community events in PG&E's most vulnerable communities. During these local outreach events PG&E's CSRs engaged customers in over 1,800 conversations related to the CARE/FERA energy bill discount programs.

In 2023, PG&E prioritized engagement at local community outreach events in CARE/FERA hard-to-reach areas. These areas were identified based on a combination of high CARE/FERA eligibility (see Section 2.4.11 of this report). Throughout 2023, 11 local outreach events were organized within the targeted zip codes with CARE/FERA

eligibility and enrollment potential, and where vulnerable customers are impacted by higher energy bills and/or disconnections. These events provide customized program outreach prioritization, based on customer need, and were hosted in collaboration with local coffee shops, foodbank distribution centers, and community resource centers/fairs.

Community Based Organization (CBO) Outreach

Despite the estimated over-enrollment in the CARE program, PG&E continued to invest in outreach and marketing targeting "hard-to-reach" customers and to increase program awareness in these communities. In 2023, PG&E continued its partnership with 13 CBOs as part of two ME&O pilots: a CARE ME&O pilot with eight CBOs and a FERA pilot with six CBOs, that were launched in 2022 and designed to help reach customers in DACs where traditional marketing channels may not be as effective. These were proactive efforts, additive to the long-standing Capitation programs, and formed in response to input from PG&E's CBO advisory groups and other stakeholders that CBOs may be more effective when offered longer-term, paid contracts.

CBOs participating in the two pilots reported reaching approximately 1M customers via various outreach channels, according to a monthly survey submitted to PG&E by each CBO. CBOs in the two pilots utilized in-person/door-to-door outreach, media, webinars, educational presentations, social media, newsletters, direct mail, CARE/FERA application intake assistance, and collaboration with other CBO partners to help reach even more customers. In addition, some CBOs collaborated with PG&E's CSO team to provide program education at various events.

Despite the high number of customers reached through these pilots, new enrollments were lower than anticipated: ~1,100 CARE applications and four FERA applications in 2023. Out of those, ~600 resulted in new CARE enrollments and four resulted in new FERA enrollments. The FERA Pilot did not generate significant FERA enrollments and the ME&O Pilot was not cost-effective in generating new enrollments. As such, PG&E ended the FERA pilot in April 2023 and the ME&O pilot in November 2023. From these two CBO Pilots, PG&E learned that paying CBOs more does equate to driving strong enrollment outcomes in what could be considered an oversaturated market for CARE, or a very narrow market for FERA. These higher paid contracts did not deliver better outcomes than the more cost-effective capitation contracts.

CARE Community Outreach Contractors (COCs)

In 2023, PG&E continued to utilize its CARE Capitation COC program, with thirty organizations participating. In an effort to increase enrollments through the COC program, PG&E revised the Statement of Work and ensured that the organizations currently enrolled in the COC program are actively working to enroll customers. Through the COC program, 610 new customers were enrolled in the CARE program in 2023. PG&E continued to reach out to new organizations in underserved areas who are interested in the COC program.

Community Outreach Marketing & Engagement Support

PG&E's Solutions Marketing team worked closely with community organizations and advocates to amplify messages to help increase enrollment in financial assistance and energy savings programs. PG&E's Solutions Marketing team developed advocate tools, such as an advocate resource and information page, on pge.com, to help aid the outreach efforts and disseminate information to community advocates. PG&E's community organizations and advocates webpage is dedicated to informing and connecting advocates to solutions to better serve their communities and received more than 4,900 clicks in 2023.

In addition, the PG&E Solutions Marketing team developed a quarterly advocate newsletter and priority campaign toolkit which is sent to more than 1,000 contacts. Advocates also were given access to self-serve digital resources including marketing materials, outreach guides, and applications in multiple languages.

California LifeLine Program Integration

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

- PG&E includes California LifeLine on its Financial Assistance landing page (www.pge.com/billhelp),[93] which provides information on a variety of customer support programs. PG&E's marking includes references to this page periodically in newsletters, news releases, and other integrated messaging of customer assistance programs.
- California LifeLine is periodically included in CARE acquisition marketing emails and post-enrollment communications such as recertification reminders.
- California LifeLine is included on print and digital resources that are utilized by CBO's in outreach. For example, PG&E includes California LifeLine on its webpage for community organizations and advocates.[94]

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

HERs explain energy usage, allow customers to compare their energy use to similar homes in their area, and provide customized tips and ideas to help customers maximize their energy savings. In 2023, approximately 3.08M customers participated in HERs with approximately 1.18M customers flagged as income-qualified. Of those customers, approximately 915,000 were enrolled in CARE, representing 77% of the income-qualified customers who received a HER, and accounting for 65% of all customers enrolled in CARE as of December 2023. PG&E continues to promote CARE and FERA via marketing modules included in the HERs to customers flagged as income-qualified and unenrolled.

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

As outlined in Section 2.4.1, PG&E leveraged a multi-channel marketing strategy throughout 2023, using a mix of channels and tactics such as email, digital advertising, the bill package, and others that work together to drive awareness, engagement, and enrollment. This multi-channel approach provides the most effective method of outreach because it reinforces the CARE message through repetition; and creates a sense of urgency to encourage customers to act. Each tactic is measured based on specific Key Performance Indicators (KPIs) including cost per measures (e.g., cost per visit, cost per click, cost per piece, etc.), click-through and view rates, and enrollment rates depending on the data available for the specific tactic and response channel. Due to online tracking limitations and a single shared application for CARE and FERA, digital media enrollments driven by marketing outreach are not directly attributable at the tactic level. Overall

[93] Last accessed on April 26, 2024

[94] https://www.pge.com/en/save-energy-and-money/energy-saving-programs/community-organizations-advocates.html (Last accessed on April 26, 2024)

effectiveness is evaluated based on how the tactics work together to deliver to engagement and enrollment targets, and to make decisions to improve or optimize campaigns.

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

Despite high overall CARE enrollment, there remain areas scattered within PG&E's territory with lower CARE enrollment rates. PG&E continued the use of ZIP Code targeted media strategies to outreach to these Hard-to-Reach populations.

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

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

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

A portion of PG&E's service area is shared with other CPUC-regulated energy and water utilities. In 2023, PG&E had data sharing agreements with SoCalGas, SCE, Sacramento Municipal Utility District, Alpine Natural Gas, the City of Tracy. California American Water, California Water Service, Del Oro Water Company, Golden State Water, Great Oaks Water, San Jose Water, PG&E shares customer data with these utilities quarterly via an automated, secure file transfer process that extracts lists of enrolled CARE customers identified in the shared service areas.

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

A database of CARE customer contact information is uploaded for weekly distribution to PG&E's ESA program implementers for use in their outreach. After the ESA guidelines increased to 250% of FPG Level in 2022, PG&E automatically enrolls customers who have participated in the ESA program in CARE or FERA, depending on the program for which they are qualified.

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

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

PG&E also runs monthly reports of customers receiving bill payments received through CSD's LIHEAP and PG&E's REACH programs and automatically enrolls eligible customers in CARE.

In addition, as discussed in ESA Section 1.6.7, PG&E receives information from the DAC-SASH program administrator GRID Alternatives and in 2023, automatically enrolled 40 households into CARE.

These combined efforts resulted in 16,090 new enrollments accounting for 6% of total new enrollments in 2023.

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

Throughout 2023, PG&E targeted existing CARE customers for outreach related to the ESA program. Filters were then applied to determine those customers who had the highest likelihood of being eligible for the ESA program because of income.

As stated in Section 2.4.6 of this report, PG&E automatically enrolls customers who receive LIHEAP or REACH assistance, or participate in the DAC-SASH program, in the CARE or FERA program. Furthermore, for the CARE automated phone calls, PG&E integrates information about the FERA and ESA programs. Additionally, Section 2.4.1 of this report details efforts to cross-promote Internet Services for All, a discounted broadband service, with CARE and other relevant offerings.

PG&E provides bi-annual Community Outreach trainings to CBOs on income-qualified programs, and other supporting programs. In 2023, PG&E trained 30 CBOs on CARE/FERA, ESA, rate options, MBL, AMP, DR, the Green Saver program, energy management tools, the Community Wildfire Safety program, Internet for All, and provided additional information on other assistance programs such as LIHEAP and REACH. In addition to the bi-annual training, PG&E also hosted focused trainings on CARE/FERA, MBL, and electric vehicle (EV) programs.

In an effort to enhance the CBO Outreach trainings, PG&E surveyed CBOs who attended the training for input on the content, delivery, and effectiveness of the trainings. In 2023, over 20 CBOs attended the training and nearly all completed the survey. PG&E received 90% satisfaction rating from the surveys.

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

Please refer to Section 1.2.6 of this report.

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

PG&E provides quarterly and other reports to CSD on various programs such as LIHEAP. To facilitate secure sharing of customer information with CSD, PG&E uses a secured file transfer site to share any sensitive or personal customer information between PG&E and CSD. This secure file transfer system ensures that customer information is protected when sharing or receiving data. In 2023, PG&E is continued to leverage this process to share data regarding LIHEAP eligible customers with past due balances so that local agencies can conduct their own outreach efforts.

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

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

By focusing on opportunities to reduce cost though efficiency and streamlining, PG&E achieved a 14% reduction in overall program administration costs between PY 2022 and PY 2023, and achieved this reduction while processing approximately 50K more new enrollments in 2023 and similar numbers of PEV and recertifications.

PG&E continued focus on improvement opportunities in 2023 included the following:

- Implemented enhanced Welcome campaign to encourage post-enrollment engagement and enrollment in other financial assistance and support programs (described in Section 2.4.1).
- Conducted multicultural outreach campaigns targeting Hard-to-Reach customers in under-enrolled ZIP codes.
- Continued testing multiple channels in the Recertification Reminder campaign, making recommendations for adjustments.
- Developed a new Eligibility Score to enhance targeting capabilities for customer acquisition, PEV and auto-recertification.
- Conducted a review of print collateral inventory and usage to eliminate waste of underutilized materials; some materials moved to print-on-demand.

- Increased collaboration and participation of PG&E's CSO in local community events to raise awareness and support customer participation in PG&E's financial assistance support programs, products, and services.
- Implemented real-time proactive PEV notifications to customers informing them that their documents were received eliminating need for customers to call.

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

Implementation of the Never Targeted campaign targeting strategy, the rebuild of the CARE model, and overall targeted audience composition likely resulted in reaching and enrolling more hard-to-reach[95] customers in 2023. When compared to 2022, PG&E sent a higher percentage of communications to hard-to-reach areas and a higher percentage of customers that reside in the hard-to-reach areas were reached by the CARE/FERA Acquisition campaigns in 2023.

Customers in hard-to-reach areas also enrolled in CARE and FERA at a higher enrollment rate in 2023 versus 2022 (CARE: 2023 - 5.2% vs. 4.0%; FERA: 0.22% vs. 0.20%)

As for overall CARE and FERA enrollment trends for the Hard-to-Reach areas, in 2023 there were a greater number of CARE and FERA enrollments.

To generate insights that would inform strategy and guide planning, PG&E contracted third-party data and analytics vendor, Targetbase, to conduct an analysis of its Hard-to-Reach customers. Using the Omni proprietary platform,[96] that includes over 7,000 data attributes for over 250M U.S. consumers, the analysis identified ZIP codes where CARE and FERA eligibility rates were above average and enrollment levels were either Saturated (index>120) or Under-Developed (index<80). From there, further segmentation looked at characteristics of customers in these areas to develop profiles for underlying hard-to-reach customer segments.

The analysis uncovered multiple actionable findings:

1. Within CARE/FERA low enrollment areas, three micro audiences stood out as being particularly susceptible to being missed by marketing efforts targeted to the broader low-income population – Caucasian Rural, Hispanic Rural and Caucasian Non-Rural.
2. Low-income, non-rural Caucasians in under-enrolled ZIP codes offered the most upside potential for new enrollment and are potentially the most actionable.

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[95] The hard-to-reach areas discussed in this section have the same definitions as the CARE/FERA Hard-to-Reach Opportunity segments that were created in the 2023 Omni Analysis. The CARE/FERA Hard-to-Reach Opportunity segments are identified based on a combination of high CARE/FERA eligibility, low CARE/FERA penetration and the population sizes on ZIP code level.

[96] Analysis performed by Targetbase via Omni, Omnicom's proprietary platform for integrated, data-driven marketing insights, planning and activation. Omnicom is an American global media, marketing and corporate communications holding company.

3. Rural Caucasians and Hispanics also offer enrollment potential; however, the optimal strategy for engaging them is less clear.

When overlaying the 23 ZIP codes included in CARE Program Monthly Report Table 8A – CARE Top 10 Lowest Enrollment Rates in High Disconnection, High Poverty, and DAC Communities by Zip Code, 17 ZIP codes were also included in the ZIP code list of CARE/FERA Hard-to-Reach Opportunity segments identified in the Omni analysis.[97]

1. From CARE Table 8A, Top 10 Lowest CARE Enrollment Rate for Zip Codes in High Poverty: Eight ZIP codes were found within the *Rural Caucasians* segment, and all are within the CARE opportunity ZIP codes which means they are high CARE eligible with low CARE enrollment.
2. From CARE Table 8A, Top 10 Lowest CARE Enrollment Rate for Zip Codes in DAC: Nine ZIP codes overlapped with the Omni analysis, with three ZIP codes falling in the *Non-Rural Caucasians* segment, and two each in the Rural Caucasians segment, Rural Hispanics segment and Non-Rural Hispanics segment.

With the strong relation between the CARE/FERA Hard-to-Reach Opportunity segments in the Omni analysis and the 23 ZIP codes tracked in the monthly reports, PG&E plans to continue to leverage the Omni profiles strategically when developing marketing and outreach plans to help drive the enrollment rate in these lower enrollment ZIP codes.

For example, in October 2023, PG&E launched a multicultural media campaign that leveraged the data and profile insights from the Omni analysis. The campaign targeted 70 rural and non-rural zip codes identified as having high numbers of estimated eligible customers, but low overall enrollment.[98]

The Rural and Non-Rural Hispanic segment profiles were used to select high engagement media channels. Tactics were executed in Spanish, and included digital video and Google Performance Max with video, digital audio, and display ads. The Spanish campaign ran from October through December, and results will serve as benchmarks for future Hard-to-Reach targeted efforts. See Section 4.3.1 of this report for campaign details and results.

Furthermore, PG&E also used the Omni analysis to adjust the hard-to-reach ZIP Code targeting list that has been in place for several years. The updated hard-to-reach list will be used for overall media planning and targeting in 2024.

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[97] Comparison made to Omni identified ZIP codes using CARE Table 8A data through December 31, 2023. ZIP codes included in Table 8A remained consistent throughout 2023.

[98] Although the campaign creative featured the Family Electric Rate Assistance (FERA) program, ZIP code targeting addressed areas of low-enrollment for both FERA and CARE.

2.5. Processing CARE Applications

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

Sub-meter tenants receive a renewal form through the mail 90-days prior to their CARE discount expiring. PG&E also sends a 30-day reminder packet for tenants who have yet to recertify. If the tenant does not respond within the 90-day period, then their CARE discount is removed. A tenant can also download a renewal form from PG&E's website, and submit via mail or email. In 2023, 7,965 tenants were sent recertification notifications, and 1,886 of those were removed for failure to submit their paperwork to recertify.

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

PG&E did not have any contracts with third parties to conduct certification, recertification, and/or verification on PG&E's behalf in 2023.

2.6. Program Management

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

Issues affecting program management primarily were related to emergency consumer protections due to impacts from disasters including wildfires and earthquakes, as detailed in Table 2.6.1. PG&E addressed these issues by pausing PEV for both standard and HU PEV requests, in the affected areas,[99] and based on premise level.[100]

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

[100] Beginning in March 2023, PG&E commenced transitioning to apply the customer protections at a premise level, thereby increasing accuracy in the application of the emergency protections.

CARE Table 2.6.1 CARE Program PEV Freezes			
Date of Proclamation	**Disaster Name**	**Affected Areas or ZIP Codes**	**Date when Protection Ends**
January 2023	Winter Storms	(Sacramento, Monterrey, and Santa Cruz Counties): 95006, 95005, 95018, 95060, 93923, 93940, 95076, 95003, 93950, 95033, 93953, 95690, 95641, 95066, 93920, 95010, 95007, 95073, 95064, 95017, 93921, 93930, 93908, 95041, 95615, 95065, 93907, 93451, 95632, 95626, 93954, 93426, 95012, 94571, 93927, 93906, 95004, 93926, 93924, 93955, 93901, 95062, 93905, 95837, 95680, 95030, 93960, 93108, 93925, 93915, 94060, 95612, 93450, 93932, 93902, 93933, 93210, 95822, 95075, 95834, 95828, 95039, 95101, 93942, 95001	March 1, 2024
March 2023	Winter Storms	Amador, Butte, El Dorado, Fresno, Humboldt, Kern, Kings, Lake, Madera, Mariposa, Mendocino, Merced, Monterey, Napa, Nevada, Placer, Plumas, Sacramento, San Benito, San Francisco, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Sierra, Sonoma, Stanislaus, Tuolumne, Tulare, and Yuba Counties	April 1, 2024

2.7. Pilots

2.7.1. CARE Post-Enrollment Verification (PEV) Pilot

CARE Post-Enrollment Verification (PEV) Pilot Project

In 2023, PG&E continued to work on its CARE PEV Outbound Calling Pilot, as described in AL 4730-G/6901-E submitted on March 31, 2023, and that became effective on April 30, 2023.[101] Via this Outbound Calling Pilot, PG&E contacts customers who initiated the PEV process, but were not successful at completing it. PG&E continued this effort for the duration of 2023 to collect more data, and because it has proven to increase the number of qualified customers who successfully complete PEV.

To illustrate, in 2023, PG&E contacted 2,486 CARE PEV customers who had initiated the PEV response process and supported 1,782 (72%) of these customers in submitting all of the required PEV income documents. Of the 1,782 who submitted documents, 1,592 (89%) were verified as CARE approved. The results of the PEV Outbound Calling Pilot indicate that this approach can be an effective tool in assisting qualified customers with completing the PEV process.

[101] https://www.pge.com/tariffs/assets/pdf/adviceletter/GAS_4730-G.pdf (Last accessed on April 26, 2024)

2.8. Studies

Table 2.8.1 provides an overview of the CARE Studies that PG&E and/or the IOUs conducted in 2023. Budgets associated with these authorized studies are provided in Appendix A of this report: ESA Table 14 – ESA Expenditures for Pilots and Studies, and CARE Table 1 – CARE Overall Program Expenses. Please see ESA Section 1.8 for more information on the Categorical Eligibility Study and 2025 LINA.

CARE Table 2.8.1
CARE Studies

Study	Lead Consultant	Contracting IOU	Project Initiation	Project Completion
CHANGES Evaluation	Opinion Dynamics	PG&E	Feb 2022	Jun 2023
Categorical Eligibility Study	Evergreen Economics	SDG&E	Jun 2022	Jun 2023
2025 Low Income Needs Assessment (LINA)	Evergreen Economics	SoCalGas	Jan 2024	Dec 2025

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

The CHANGES program delivers in-language services to Limited English Proficient (LEP) customers to assist with managing their natural gas and electricity services. The CPUC administers the program through a main implementer, who then manages a network of participating CBOs that work with LEP consumers in their preferred language. D.21-06-015 requires the CHANGES program to be evaluated by an independent third-party and the first evaluation to begin no later than 12 months after Decision approval. The evaluation began in February 2022, with Opinion Dynamics as the selected evaluation consultant. The evaluation's study team consisted of representatives from the CPUC Consumer Affairs Branch, ED and the IOUs.

This process evaluation covered the program period of 2019-2021 and was designed to cover five key areas: 1) Overall Performance, 2) Data Collection, 3) Program Value, 4) Program Costs and Funding, and 5) Program Operations and Structure. To address the study's objectives, a mixed-methods approach was employed to leverage existing data sources and collect new primary data. In mid-2022, primary data originated from in-depth interviews conducted with CPUC staff, IOUs, the program implementer, and select CBOs within the network managed by the program implementer. In addition, a mail survey was conducted with PY 2021 program participants in early 2023. The survey was made available in English and four other most common languages spoken by CHANGES customers, including Chinese, Spanish, Vietnamese, and Korean, and had a positive response rate of 8.8%.

Two public workshops were held prior to finalizing the draft research plan (2022) and draft final report (2023), respectively, to gather stakeholder feedback and incorporate in the final deliverables. Upon the completion of three research tasks – evaluability assessment, program costs and benefits assessment, and spatiotemporal distribution

analysis, the final report and evaluation was issued in June 2023 and resulted in the following conclusions and recommendations:[102]

1. The CHANGES program is conducting activities aligned with its four stated objectives[103] through program activities.

2. Current data collection and tracking practices limit the ability of program implementers and stakeholders to understand the full impact of the program on LEP customers.
    a. Specific recommendations include improving the accessibility, completeness, and quality of program tracking data, along with codifying metrics related to program activities, client characteristics, program referrals, and assistance outcomes.

3. COVID-19 related budget impacts and demand fluctuations suggest that a longer time horizon is needed to comprehensively assess the basis for funding expansion.

4. Program costs may not be fairly distributed across the IOUs, as indicated by the services provided in their territories. The traditional funding split of 30% PG&E, 30% SCE, 25% SoCalGas, and 15% SDG&E is not reflective of actual program activities, with PG&E receiving more services than it pays for.

5. Data on the distribution of CBOs and program activity indicates the current model may have some weaknesses in ensuring adequate coverage in all areas of need, with underserved areas located within and outside of IOU territories.

6. Based on the services provided and the customers who benefit, funding the CHANGES program through the CARE budget is appropriate as compared to the General Rate Case (GRC).

2.9. CARE Working Groups and Sub-working Groups (SWG)

See ESA Section 1.10 of this report for details of WGs and SWGs.

2.10. Miscellaneous

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

In 2023, PG&E complied with the terms of the Joint Stipulation adopted in D.21-06-015, which is primarily focused on integrating broadband affordable offer messaging into CARE/FERA/ESA messaging.

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[102] PY 2019-2021 CHANGES Program Evaluation - Final Report. https://www.calmac.org/publications/CHANGES_Evaluation_Report__CALMAC.pdf (Last accessed on April 26, 2024)

[103] The four stated objectives are: 1) Understand energy bills; 2) resolve bill disputes, service issues, and avoid disconnection; 3) increase awareness of financial assistance and energy programs as well as support customer access to these programs; and 4) learn about ways to save energy.

PG&E has an ongoing placement of a telephone number and link to the Internet for All Now website on www.pge.com/billhelp,[104] a web page featuring information about a range of customer financial assistance programs and services.

PG&E included messaging for Internet for All - discount broadband services, as part of the following campaigns:

- Remarketing acquisition campaign to approximately 10,000 previously enrolled ARE and FERA customers.
- Bill Assistance email targeted to approximately 223,000 customers CARE/FERA and Not enrolled customers.
- PG&E included mention of Internet for All in a September 2023 news release related to financial assistance programs.

In compliance with Joint Stipulation (e), PG&E notes that, in 2023, approximately 82% of CARE customers had an email address on file.

[104] Last accessed on April 26, 2024

3. CARE Expansion Program

The CARE Expansion program, or Commercial CARE program (Migrant Farm Workers Facilities, Non-Profit Group Living Facilities, and Agricultural Housing Families), are the programs that qualify under this program.

3.1. Participant Information

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

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

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

Of the tenants residing within CARE expansion program qualified facilities, approximately 89,824 were receiving the electric CARE discount, and 76,528 were receiving the gas CARE discount, by December 31, 2023. This represents the total number of residents housed in all facilities, both residential and commercial.

3.2. Usage Information

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

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

3.3. Program Costs

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

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

3.3.2. Discount Information

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

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

Residential Facility Gas Discount:	$249.60
Residential Facility Electric Discount:	$727.20

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

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

Commercial Facility Gas Discount:	$2,935.94
Commercial Facility Electric Discount:	$8,002.25

3.4. Outreach – CARE Expansion

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

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

For non-profit organizations, there are no major barriers to participation in the program. Additional outreach or marketing to non-enrolled organizations could increase awareness of the program, but challenges exist from a cost-effectiveness perspective because there are unlikely to be a high volume of organizations that qualify. Organizations that are enrolled in CARE are notified before their discount expires so they have the opportunity to recertify.

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

Because of the small estimate of qualified organizations, PG&E has not invested in a broad multi-channel marketing approach as it does with residential single and MF households (as described in Section 2.4.2 of this report).

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

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

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

PG&E did not encounter any barriers to participation in 2023.

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

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

3.5. Program Management

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

PG&E did not experience any issues or events that significantly affected program management for 2023 with the CARE Expansion program.

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

2023 Family Electric Rate Assistance (FERA) Program | Summary of Results and Program Highlights

In 2023, PG&E estimated that 163,489 of its customers were eligible for the FERA discount. By the end of 2023, PG&E had enrolled 38,295 customers, or 23% of the total eligible population within its service territory, into the FERA program. 2023's enrollment totals represent an overall increase of 1,643 FERA customers over 2022's enrollment of 36,652 customers. Participating households in 2023 received average monthly bill discounts of approximately $38 for electricity.

FERA Program Summary Table 4 provides a summary of PY 2023 program expenditures and activities.

FERA Summary Table 4 2023 FERA Program Summary			
2023	**Authorized Budget**	**Actual**	**%**
Administrative Expenses	$2,846,400	$2,685,829	94%
Subsidies and Benefits	$15,727,000	$17,148,000	109%
Total Program Costs and Discounts	**$18,573,400**	**$19,833,830**	**107%**
2023 FERA New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc.**	**Self-Certified as Categorically Eligible**	**Self-Certified as Income Eligible**
By Method	345	N/A	13,963
2023 FERA Enrollment	**Estimated Eligible Participants**	**Participants**	**Enrollment Rate**
Total Enrolled	**163,489**	**38,295**	**23%**

D.21-06-015 set an enrollment goal of 50% enrollment by the end of 2023. PG&E's FERA program reached only 23% enrollment by year-end, significantly below the 50% goal, and off track to meet 2026's 70% enrollment goal, despite PY 2023's investment of $2.6M in ME&O. This shortfall is primarily due to well-identified structural program barriers, such as the small eligible population and the narrow income differentiation of $1 between FERA and CARE eligibility.

Throughout 2023, PG&E continued organizing several FERA meetings with ED and the other electric IOUs to elevate shortcomings in meeting the FERA enrollment goal, as well as discuss ideas for modifications and new initiatives in the aim of increasing program enrollment and/or retention. In addition, PG&E worked with IOU and non-IOU stakeholders in the CARE/FERA SWG (part of the ESA WG as further detailed in ESA Section 1.10 of this report) to explore ways to improve post-enrollment verification processes.

In response to informal feedback from its advisory groups, the LIOB, and other stakeholders, PG&E proactively invested in CBOs as an avenue to support FERA enrollment. In July 2022, PG&E launched a FERA CBO Pilot – additive to the existing FERA capitation program – utilizing six newly contracted CBOs to begin supporting ME&O efforts. However, the FERA CBO pilot was not successful overall, as most households the CBOs contacted enroll in CARE. Due to low enrollment and poor performance of the pilot, PG&E decided to end the FERA CBO pilot at the end of April 2023. Results from this CBO Pilot indicate that CBOs are unlikely to be effective channels for FERA enrollment.

Because PG&E's continued investment in marketing efforts, and the CBOs not delivering the desired outcome, PG&E contracted a third-party consultant (Evergreen Economics) to conduct a FERA barriers enrollment study in its service territory. The study commenced in Q4 2023, with the primary activities planned for PY 2024 - Q1 2025, with preliminary findings expected to be available in early 2025. PG&E looks forward to participating in the study and is hopeful the consultant will be able to provide valuable input for stakeholders related to the structural challenges and enrollment barriers PG&E has observed in marketing FERA.

The FERA program's noteworthy marketing, outreach, and administrative initiatives and achievements in 2023 included:

- PG&E led the IOUs' coordination efforts with the ED to highlight enrollment challenges and explore new initiative development.
- Created a FERA Barriers Enrollment study which will conclude its findings in 2025.
- A FERA Alert was added to the Customer Billing System in September 2023, and this allowed CSRs to identify and advise FERA.

Despite PG&E's focused and consistent efforts, and launching new endeavors such as the FERA CBO pilot, FERA enrollment continued to lag behind program goals. PG&E has raised this concern regarding FERA's inherent challenges with all stakeholders, including Commission staff, in an attempt to solicit creative ideas, but has not received any alternative solutions for implementation. PG&E does not expect to achieve the program goals by the end of the cycle.

Procedural Background

The FERA program provides a monthly 18% discount on electric bills for qualifying households of three or more individuals throughout PG&E's service area.[105] D.21-06-015 authorized PG&E's FERA administrative and subsidy budgets for PYs 2021-2026, and set a FERA enrollment goal of at least 50% in PG&E's service territory, by the end of 2023.[106]

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

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

4.1. Participant Information

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

FERA Table 4.1.1 2023 Total Number of FERA Enrolled Customers			
2023	**FERA Enrolled[a]**	**FERA Eligible Households**	**FERA Enrollment Rate**
January	36,314	163,489	22%
February	36,608	163,489	22%
March	37,198	163,489	23%
April	37,199	163,489	23%
May	37,994	163,489	23%
June	38,287	163,489	23%
July	37,889	163,489	23%
August	38,402	163,489	23%
September	38,483	163,489	24%
October	38,512	163,489	24%
November	38,350	163,489	23%
December	38,295	163,489	23%

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

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

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

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

There were 175 sub-metered tenants enrolled in FERA at year-end.

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

No problems were encountered during this reporting period.

4.2. FERA Program Costs

4.2.1. FERA Discount Costs

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

The average monthly FERA discount received per FERA customer in 2023 was $37.76

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

The cumulative annual discount for all FERA customers in 2023 was $17,148,000.

4.2.2. FERA Administrative Costs

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

FERA Table 4.2.2.1 2023 FERA Program Summary Costs			
FERA Budget Categories	**2023 Authorized Budget**	**2023 Actual Expenses**	**% of Budget Spent**
Outreach	$2,623,703	$2,623,703	100%
Processing, Certification and Verification	$53,897	$9,997	19%
Post-Enrollment Verification	$84,000	$0	0%
IT/Programming	$0	$0	0%
Pilots	$0	$0	0%
Measurement and Evaluation	$0	$0	0%
Regulatory Compliance	$29,500	$0	0%
General Administration	$55,300	$52,130	94%
CPUC ED Staff	$0	$0	0%
Total Expenses	**$2,846,400**	**$2,685,829**	**94%**
Subsidies and Benefits	**$15,727,000**	**$17,148,000**	**109%**
Total Program Costs and Discounts	**$18,573,400**	**$19,833,830**	**107%**

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

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

Processing, Certification and Verification
This category includes costs related to staff labor for application processing, certification, recertification, and training. PG&E has automated some of its certification and recertification processes; therefore PG&E incurs minimal labor costs in this category.

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

Customer Benefits
This category includes costs related to rate discounts.

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

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

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

The 2023 year-end balance for the FERA balancing account was $20,678,324. This represents an increase of 0.15% over 2022's year-end balance of $20,648,177.

4.3. Marketing, Education and Outreach

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

In 2023, PG&E continued to prioritize FERA outreach efforts, building off the foundation established in prior years' efforts. M&O plans engaged customers across several channels such as digital media, direct mail, email, and via CBOs to increase reach and awareness.

New campaign strategies and testing were executed throughout the year including a new paid media campaign targeting Spanish speaking customers, direct mail and email cadence testing, and offer testing to non-responders.

PG&E also developed a business-rule driven FERA "Eligibility Score," as an additional tool to refine targeting strategies. While the Acquisition Propensity model employs statistical algorithms and predictive analytics to gauge a customer's likelihood to enroll in FERA based on past interactions and demographic insights, the Eligibility Score leverages predefined business rules to target customers who appear to be eligible for FERA based solely on the demographic data available (Acxiom household income and household size data). For customers without complete Acxiom data, Zip code level Athens Eligibility Rates were used for the Eligibility scores.

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

2023 Highlights:

- FERA direct marketing contacted over 550,000 customers and delivered more than 1,800 FERA enrollments, but far greater numbers of CARE enrollments.
- A test campaign targeting previously enrolled CARE customers with a FERA offer showed a slightly higher FERA enrollment rate than the CARE Failed to Recertify or FERA Failed to Recertify efforts.
- Digital media campaign performance exceeded 2022, with an overall 1.24% CTR - more than double historical CTR.
- Digital test highlighting the average monthly savings dollar amount did not outperform the 18% savings offer.

- Launched a new CARE/FERA Welcome Journey which drove customer engagement and enrollment in other financial support programs and tools.
- Even with a multi-channel Recertification Reminder campaign, FERA customers recertify at a much lower rate than CARE customers.

Direct Marketing

A summary of 2023 FERA direct marketing enrollments is shown in Table 4.3.1.

FERA Table 4.3.1.1 FERA Direct Marketing Communications			
Number of FERA Communications Sent	**Number of Customers Contacted**	**CARE Enrollments**	**FERA Enrollments**
1,349,384	554,678	22,984	1,812

Never Targeted Monthly Campaign
In 2023, PG&E continued to execute the Never Targeted acquisition campaign strategy introduced in 2022. This automated campaign deployed monthly to customers in top deciles of the FERA propensity model[107] who have not received previous campaign messages. Customers received a series of up to three messages with a new audience starting the journey each month.

Testing was conducted within the Never Targeted campaign to look for opportunities to improve the FERA enrollment rate. PG&E ran a direct mail test to compare enrollment rate when a paper application is included in the mail package versus a package without the paper application. The test concluded that a paper application did not have an impact in driving FERA enrollment. However, the CARE enrollment rate was 20% higher for those receiving the paper application (4.13% vs. 3.44%). Since FERA enrollments were the main campaign objective, PG&E discontinued the use of the paper application in direct mail packages in Q4.

Additional tests were conducted to 1) look at enrollment rate for customers receiving communication via email plus direct mail, versus email-only communication; and 2) communication frequency testing in which one group received the message once per quarter over three quarters, while the other group received a message three months in a row.

For emailable customers, including email plus direct mail, communication had a large impact on both CARE and FERA enrollments. The FERA enrollment rate for customers receiving the additional direct mail was 0.65%, and 0.35% among customers not receiving a direct mail. The CARE enrollment rate for customers receiving the additional direct mail was 5.86%, and 4.45% among customers not receiving a direct mail. The improvement in enrollment rate for email plus direct mail demonstrated the value of continuing this strategy for FERA campaigns where incremental enrollments are needed to achieve progress towards the aggressive enrollment goals.

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107 The FERA propensity model assigns customers a Decile score from 1 to 10, with one being the most likely to enroll in FERA and 10 being the least likely to enroll.

Customers who received the FERA communications in the one-month cadence group generated higher FERA and CARE enrollment rates than the three-month cadence. The one-month cadence group saw an 8% increase for FERA enrollments and 4% increase for CARE enrollments).

Failed to Recertify

In addition to the monthly Never Targeted acquisition campaign, PG&E deployed quarterly campaigns targeted to customers who failed to recertify for FERA. PG&E sent FERA remarketing messages to approximately 5,200 customers who had previously been enrolled in FERA. The FERA Failed to Recertify campaign resulted in 115 FERA re-enrollments and 289 CARE enrollments.

The Failed to Recertify campaign results reaffirm the ongoing challenge to increase FERA enrollment. Even when FERA is remarketed to customers previously enrolled in CARE or FERA, the campaign generates significantly more CARE enrollments.

FERA Table 4.3.1.2
FERA Failed to Recertify Campaign Results

2023 Campaign	# of Unique Customers Contacted	CARE		FERA	
		# of Enrollments	Enrollment Rate	# of Enrollments	Enrollment Rate
Q1 FERA FTR	2,177	131	6.0%	57	2.62%
Q2 FERA FTR	624	31	5.0%	10	1.60%
Q3 FERA FTR	1,078	80	7.4%	22	2.04%
Q4 FERA FTR	1,378	47	3.4%	26	1.89%
Total for 2023	**5,257**	**289**	**5.5%**	**115**	**2.19%**

PG&E also tested a FERA message with approximately 28,000 customers previously enrolled in CARE who failed to recertify. Customers who received a CARE failed to recertify marketing campaign, but did not re-enroll in CARE, were sent a new direct mail and/or email communication that acknowledged their previous enrollment in CARE and encouraged them to evaluate their potential eligibility for FERA. The test campaign showed a similar enrollment rate (0.41%) to the average FERA enrollment rate for the monthly Never Targeted campaign (0.40%). However, it showed a higher FERA enrollment rate versus the regular CARE failed to recertify campaigns (.25%) that remarket CARE. The overall enrollment volume was small with 115 FERA enrollments and 1,597 CARE re-enrollments, but the incremental enrollment for FERA may warrant additional testing in the future.

Non-Responder Testing

In 2023, PG&E conducted further testing with FERA marketing non-responders. In Q3, PG&E sent an A/B offer test to 62,000 customers, using an updated version of the non-responder postcard creative tested in 2022. Half of the audience received an 18% savings offer (the Control), and the other half received the test version featuring the average monthly savings amount. The test looked to compare responses to a percentage savings amount versus a dollar savings amount.

For the non-responder campaign in 2023 there was roughly a 2x enrollment rate for both CARE and FERA programs compared to 2022. The FERA non-responder Test message cell had slightly higher CARE and FERA enrollment rates compared to the FERA non-responder Control message. Both FERA non-responder cells resonated well with

potential CARE enrollees, generating a 1.7% and 1.6% enrollment rate respectively. The results for the Test and Control message versions are not statistically significant at this level, and thus there are not clear actionable outcomes from the test campaign.

FERA Table 4.3.1.3 FERA Non-Responder Campaign Results					
Offer Description	**# of Customers Contacted**	**FERA Enrollments**	**FERA Enrollment Rate**	**CARE Enrollments**	**CARE Enrollment Rate**
2022 FERA Non-Responder Campaign	257,677	187	0.07%	1907	0.7%
2023 FERA Non-Responder – Percentage (Control)	42197	65	0.15%	674	1.60%
2023 FERA Non-Responder – Dollar Amount (Test)	42219	72	0.17%	712	1.69%

Paid Media Summary

PG&E launched the 2023 FERA digital campaign in January, carrying over successful strategies from the prior year. The FERA campaign ran all tactics as “Always-On” in both English and Spanish, with an annual investment of approximately $506,000. Tactics included: Search Engine Marketing (SEM), Google Performance Max, display and Native advertising. Media delivery was territory-wide to drive broad awareness, engagement, and enrollment.

The Google paid media buy included paid search, Performance Max and Discovery ads across PG&E’s service territory. Additional media spend was allocated to Google Performance Max and Discovery ads in 165 targeted Zip codes with higher estimated eligibility for FERA.

The 2023 FERA campaign performed very well against key media metrics. Over 1.4M Clicks were delivered at a CTR of 1.24%, more than doubling the 2022 campaign CTR (0.59%).

The campaign delivered 1,042,382 landing page visits, exceeding campaign visits goal by 2.5x at a $0.49 CPLPV, that is 61% more efficient than the historical cost of $1.25 (2022 CPLPV).

Similar to offer testing conducted in the direct mail and email, PG&E launched Google FERA offer testing in June 2023. The test leveraged an A/B split test of the FERA offer highlighting the 18% monthly savings (Control) with a 4.2% CTR versus the $38 average monthly savings (Test) received only 2.34% CTR. The Test version was discontinued with results showing the Control offer as the strongest option for this digital application channel.

Spanish Media Campaign

As part of PG&E’s focus to increase enrollment in the ZIP code lists presented in the monthly reports, PG&E worked with a third-party data and analytics consultant to perform a deep dive on hard-to-reach customers throughout the territory.

Using the Omni proprietary platform[108] that includes over 7,000 data attributes for over 250M U.S. consumers, the analysis identified Zip codes where CARE and FERA eligibility rates were above average and enrollment levels were either Saturated (index>120) or Under-Developed (index<80). From there, further segmentation looked at characteristics of customers in these areas to develop profiles for underlying hard-to-reach customer segments.

The analysis demonstrated enrollment opportunity with Spanish-speaking customers in rural and non-rural Zip codes. In October, PG&E launched a new digital media campaign leveraging insights from the Rural Spanish and Non-Rural Spanish customer profiles.

Targeting and geographic strategy were distinct from the FERA Always-On campaign in that it was entirely focused on Spanish-speaking customers (FERA Always-On media buy delivers a 70/30% English/Spanish allocation). The geographic scope of the test was very focused on 70 rural and non-rural Zip codes which were identified as having high numbers of estimated eligible customers, but low overall enrollment.

The profiles provided useful guidance in planning the test. For example, one Hard-to-Reach customer profile indicated higher engagement with media channels like digital display ads and digital or streaming radio, but low engagement with direct mail and Facebook ads. Additionally, the profile provided a view of the customer's busy and industrious lifestyle, and heavy dependence on mobile devices for viewing media.

Using the profiles, PG&E selected a mix of tactics which was distinctly different to test new ways to reach and engage with these customers. Data from the Omni profiles was used to guide media channel selection indicating potentially high-engagement media among rural and non-rural Hispanics, with native language preference. For example, the customer profile indicated higher engagement with media channels like digital display ads and digital or streaming radio, but low engagement with direct mail and Facebook ads. Additionally, the profile provided a view of the customer's busy and industrious lifestyle, and heavy dependence on mobile devices for viewing media. Campaign tactics selected included digital video and Google Performance Max with video, digital audio and display ads in Spanish.

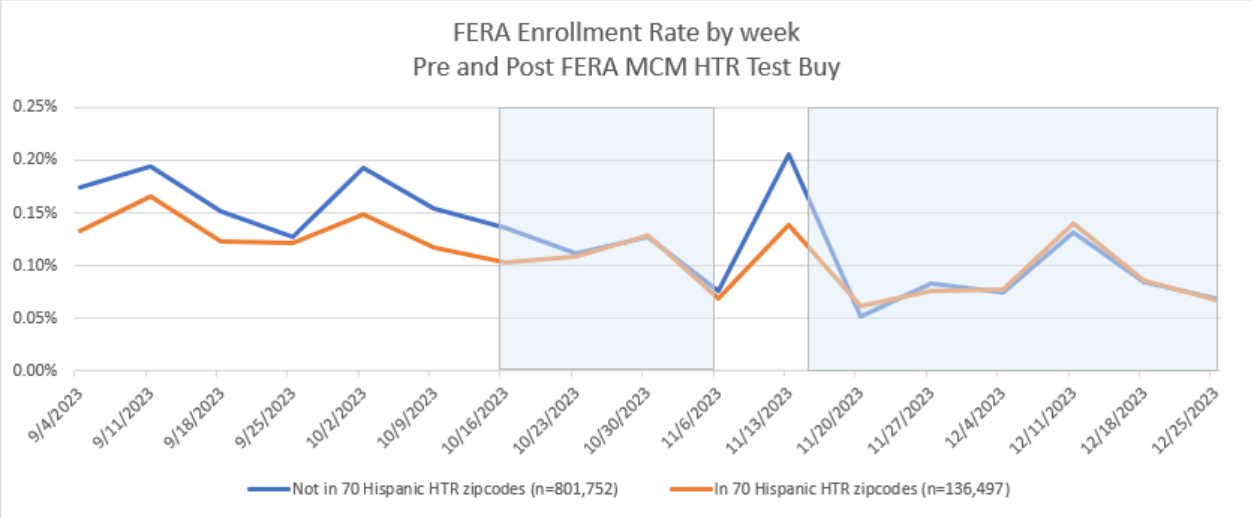
The campaign delivered over 19.4M impressions and almost 61,400 Clicks at a relatively strong 0.32% CTR, indicating good interest in the creative and message. A total of 37,000 Visits were delivered at a $2.93 CPLPV which is very efficient given the short time-in market, Q4 seasonality, and limited scope (70 zips, Spanish only). These metrics established measurement benchmarks for similar multicultural campaigns PG&E may execute in the future.

Observation of FERA enrollment trends provides interesting evidence that the media campaign had a positive impact in the targeted area. FERA weekly enrollments both pre and post campaign launch (as indicated by the blue bars in Figure 4.3.2 below) showed that customers residing outside the 70 ZIP codes targeted in the campaign had higher enrollment rates than customers that live within the 70 targeted ZIP codes before the

[108] Analysis performed by Targetbase via Omni, Omnicom's proprietary platform for integrated, data-driven marketing insights, planning and activation. Omnicom is an American global media, marketing and corporate communications holding company.

campaign launch.[109] When the campaign launched the week of October 16, the enrollment rate for customers who live within the 70 targeted ZIP codes increased to a similar enrollment rate to the customers who live outside the 70 targeted ZIP codes. During the week when the campaign was paused (November 6-November 14), the enrollment rate gap formed again. The campaign resumed on November 15, and the enrollment rate gap closed once again.

Figure 4.3.3 – FERA Enrollment Rate by Week Pre- and Post-Hispanic Hard-to-Reach Media Campaign



Bill Inserts

PG&E also continued to leverage in-house tools and resources to promote FERA, including bill inserts, HER marketing modules, and articles in the Income-Qualified targeted version of the newsletter.

In addition to the annual June Bill Insert to highlight 2023's updated CARE and FERA income guidelines, PG&E included a new FERA-focused bill insert in February printed bills to approximately 2M residential customers not enrolled in CARE or FERA. The insert highlighted FERA monthly savings of 18% and the income guidelines. The call-to-action used a QR code to take the customer to the CARE/FERA landing page on pge.com to apply. The QR code drove 1,247 unique visits to the web page and 244 submitted applications.

Retention Campaigns

In March 2023, PG&E launched a new Welcome campaign that included FERA customers to support program retention and improve the enrollment experience. Communications were personalized with dynamic content including information about other relevant cost and energy saving programs based on specific customer data attributes and eligibility.

PG&E also continued the Recertification Reminder campaign with the objective of reducing attrition caused by customers' failure to recertify for FERA. Refer to Section 2.4.1 of this report for campaign details and results.

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109 Audience base for analysis is customers enrolling who have an Acxiom data indicating Spanish language preference.

Other Efforts

In addition to the M&O strategies described above, PG&E continued to leverage internal initiatives/programs aim at support customers in-need and expand partnerships with entities that are active in the low-income customer segment to reach customers who may be eligible for FERA. However, these efforts have largely yielded limited results with respect to FERA enrollments.

Outbound Financial Assistance

PG&E established an outbound calling campaign to reach customers with past-due amounts. The outbound calls provided customers with flexible pay plans as well as information about CARE, FERA, MBL, and other agency assistance programs. From January 2023 through December 2023, 6,568 customers were enrolled in CARE and FERA programs through this campaign, as further detailed in CARE section 2.4.1.

Community-Based Organizations (CBOs)

1. **CBO Capitation Program**
   In addition to utilizing its broad network of CBOs to conduct outreach for FERA and other assistance programs available to customers, PG&E partners with CBOs in its CARE Capitation COC program to help promote FERA. CBOs in the COC program are paid $30 for each newly enrolled customer in the FERA program. However, the COC program generated only three FERA enrollments in 2023.

2. **FERA Program CBO Pilots**
   Additive to the CBO Capitation Program, PG&E proactively developed new CBO models in 2022, by contracting with multiple CBOs for longer-term, paid agreements for outreach. The two pilots—a ME&O Pilot focused on hard-to-reach customers, and a FERA Pilot—were designed to promote FERA, with the FERA pilot focused heavily on FERA outreach. CBOs who participated in the outreach Pilots used a variety of outreach methods, including in-person events, social media, and digital marketing to help promote various programs. Despite the effort to develop new CBO models, the FERA pilot ended in April 2023 and the ME&O Pilot ended in November 2023 due to lackluster results. These results indicate that CBOs face challenges in driving FERA enrollments and are unlikely to be an avenue to support PG&E in reaching the FERA enrollment goals.

Categorical Eligibility Study
D.21-06-015 authorized the IOUs to conduct a Categorical Eligibility Study (Study) to propose an updated list of categorical programs for enrollment in the ESA, CARE, and/or FERA programs[110] and assess whether any recommended categorical programs would be suitable candidates for CARE or FERA automatic enrollment.[111] The IOUs utilized a third-party consultant (Evergreen Economics) to complete the Study using collected data on 17 third-party assistance programs and interviews. The Study determined that the use of categorical eligibility for FERA is not practical given FERA's narrow income range for eligibility and because none of the third-party programs analyzed use a minimum household size of three individuals.[112]

FERA Alert in Customer Billing System
PG&E developed a FERA Alert in PG&E's Customer Billing System in September 2023. The FERA Alert was designed to help PG&E's CSRs identify and advise customers when they are potentially eligible to apply for the FERA program, also this strategy is to help the regulatory requirement of improving FERA enrollment and help customers with affordable energy program options. Results are pending.

4.3.2. Discuss each of the following:

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

In 2023, PG&E enrolled 320 customers into FERA from referrals from the ESA program (as further described in Section 1.6.1); and 25 additional customers into FERA after they completed their DAC-SASH program applications (as detailed in Sections 1.6.7 and Section 2.4.6).

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

To highlight and elevate the challenges in meeting program enrollment goals, PG&E continued leading the coordination of an ED-IOU meeting several times in 2023 to discuss FERA enrollment outcomes, plans, and ideas for modifications or new initiatives to try and increase enrollment and/or retention.

Below are PG&E's observed barriers to participation and mitigation steps. Because these barriers are based on observation and experience, PG&E initiated a third-party evaluation and study to gather evidence allowing for determination of the barriers and potential mitigation solution, as further described in Section 4.3.3.1.

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

[111] The study will also assess whether any recommended categorical programs would be suitable candidates for CARE or FERA automatic enrollment.

[112] Evergreen Economics, 2022 Categorical Eligibility Study, A Report to the California Investor-Owned Utilities (June 26, 2023), pp 4-5, available at https://www.calmac.org/publications/Categorical_Eligibility_Report_-_Final.pdf (Last accessed on April 26, 2024)

Structural Barriers

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

Mitigation Steps:

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

Barriers to Retention with Existing Enrollees

- The high non-response rates in recertification and PEV processes drives attrition and reduces overall program enrollment, as further detailed in Section 4.5.1

Mitigation Steps:

- Enhanced communication initiatives for recertification, such as adjusting the timing of text reminders.
- Improvements in various steps of the PEV process, such as implementing real-time notifications to customers that their documents had been received.
- Participation in the CARE/FERA PEV SWG of the ESA WG in to help improve PEV and recertification outcomes.

4.3.3. Miscellaneous

4.3.3.1. FERA Barriers Study

In November 2023, PG&E commenced a FERA Barriers Study with a third-party evaluator, Evergreen Economics, to explore the different dimensions and corresponding solutions to FERA enrollment barriers, through qualitative and quantitative analyses and customer focused research. The study will also evaluate several hypotheses that may be linked to current enrollment challenges, and potentially, devise program and outreach recommendations to increase program enrollment. As of December 2023, Evergreen Economics was conducting document reviews to assess PG&E's past marketing and outreach efforts on the FERA program, and will put together a research plan to address the project objectives. Preliminary findings are expected to be available by early 2025.

4.4. Processing FERA Applications

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

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

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

4.4.2. Processing Random Post-enrollment Verification Requests

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

See Appendix A of this report: FERA Table 3 – FERA Post-Enrollment Verification Results.

4.5. Program Management

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

Program Attrition

Program retention of enrolled customers continues to be a program management challenge for FERA. To illustrate, in 2023, approximately 25% of total enrolled FERA households were removed due to non-response on PEV or recertification, or for submitting incomplete/ineligible income documents via these processes. To help address the program retention challenges, PG&E focused on several initiatives in 2023 to reduce attrition.

PG&E worked with other IOUs in the CARE/FERA PEV SWG to identify opportunities for improvement in program retention. Recommendations for improvement included: evaluate the language and format of forms and letters, add text messages and email to the existing communication channel mix, add a one-time courtesy phone call to customers who provide incomplete/incorrect documents, make PEV FAQs more prominent on the website, create a how-to-video explaining the PEV and HU PEV processes, and align HU PEV waivers for ESA-verified customers. Because PG&E had already implemented several of these recommendations into its processes in prior PYs, such as texting, PG&E focused in 2023 in reframing the language and format of letters/notifications, and using analytics to optimize the timing of customer messages.

In addition, PG&E contracted with a third-party vendor to conduct customer research into pain points and issues customers have faced in the CARE PEV process that may be adopted prospectively.

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

Program attrition, as described in the preceding section, affected FERA's capacity to retain enrolled customers. In addition, the structural program barriers descried in Section 4.3.2.2 continue to limit new program enrollment.

In summary, despite investing $2.6M in novel marketing and outreach strategies in 2023, PG&E is no closer to achieving program goals. Moreover, proactive efforts PG&E made in response to stakeholder recommendations to engage CBOs via new pilots with robust compensation structures have proved ineffective. PG&E remains committed to offering this program as a valuable financial assistance tool but the outcomes do not match the marketing investment. PG&E is hopeful the Barriers Study consultant may identify new approaches or solutions to overcome program barriers for future PYs.

5. Fund Shifting

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

PG&E's fund shifting activities in 2023 included:

- 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.[113]

Detailed information can be found in Appendix A of this report: ESA Table 11 – Fund Shifting.[114]

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

PG&E's CARE fund shifting activities in 2023 included moving $147,821 from the Outreach category to the PEV category, and $413,892 from the Outreach category to IT Programming category.[115]

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

PG&E's FERA fund shifting activities in 2023 included moving $3,203 from the Processing, Certification, Recertification budget category to the Outreach budget category.[116]

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

There were no ESA, CARE or FERA program fund shifting activities that occurred in 2023 that fell outside of the fund shifting guidelines in D.12-08-044, as updated in D.16-11-022, D.17-12-009, and D.21-06-015.

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[113] Submitted via PG&E's Annual Electric True-Up AL 7116-E.

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

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

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

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

AB	Assembly Bill
AC	Air Conditioning
ACS	American Community Survey
AEA	Association for Energy Affordability
AL	Advice Letter
AMP	Arrearage Management Plan
BAMBE	Bay Area Multifamily Building Enhancements
BayREN	Bay Regional Energy Network
BPI	Building Performance Institute
CARB	California Air Resources Board
CARE	California Alternate Rates for Energy
CAS	Concurrent Application System
CBO	Community-Based Organization
CCA	Community Choice Aggregators
CE	Cost-Effectiveness
CHANGES	Community Help and Awareness of Natural Gas and Electric Service
COC	Community Outreach Contractor
CPLPV	Cost Per Landing Page Visit
CPUC	California Public Utilities Commission
CSD	California Department of Community Services and Development
CSI	California Solar Initiative
CSO	Customer Service Outreach
CSR	Customer Service Representative
CTR	Click-Through-Rate
CWR	Community Workforce Resources
D.	Decision
DAC	Disadvantaged Community
DR	Demand Response
DW	Disadvantaged Worker
ED	Energy Division
EE	Energy Efficiency
ESA	Energy Savings Assistance
ESACET	ESA Cost Effectiveness Test

ESJ	Environmental and Social Justice
EUI	Energy Use Intensity
FERA	Family Electric Rate Assistance
FPG	Federal Poverty Guideline
GHG	Greenhouse Gas
HER	Home Energy Report
HHS	Health and Human Services
HPWH	Heat Pump Water Heater
HU	High Usage
HVAC	Heating, Ventilation, and Air Conditioning
IDAT	Interval Data Analysis Tool
IOU	Investor-Owned Utility
IS	Installation Standard
Joint IOUs	PG&E, SDG&E, SCE and SoCalGas
k	Thousand
kW	Kilowatt
kWh	Kilowatt Hour
LEP	Limited English Proficient
LIHEAP	Low Income Home Energy Assistance Program
LINA	Low Income Needs Assessment
LIOB	Low Income Oversight Board
LRM	Lifecycle Refrigerant Management
M	Million
MASH	Multifamily Affordable Solar Homes
MBL	Medical Baseline
ME&O	Marketing, Education and Outreach
MESP	Multifamily Energy Savings Program
MF	Multifamily
MF CAM	Multifamily Common Area Measures
MFWB	Multifamily Whole Building
MHP	Mobile Home Park
N. MFWB	Northern Multifamily Whole Building
NEI	Non-Energy Impacts
NGAT	Natural Gas Appliance Testing
NMEC	Normalized Metered Energy Consumption
P&P	Policy and Procedures

PD	Pilot Deep
PEV	Post-Enrollment Verification
PG&E	Pacific Gas & Electric Company
PP	Pilot Plus
PSPS	Public Safety Power Shutoff
PY	Program Year
Q1	First Quarter
Q2	Second Quarter
Q3	Third Quarter
Q4	Fourth Quarter
REACH	Relief for Energy Assistance through Community Help
RFP	Request for Proposal
SASH	Single Family Affordable Solar Homes
SCE	Southern California Edison
SDG&E	San Diego Gas and Electric Company
SF	Single-Family
SGIP	Self-Generation Incentive Program
SoCalGas	Southern California Gas Company
SOMAH	Solar on Multifamily Affordable Housing
SPOC	Single Point of Contact
SWG	Sub-Working Group
TANF	Tribal Temporary Assistance for Needy Families
UAS	Universal Application System
WCP	Water-Energy Coordination Program
WE&T	Workforce Education and Training
WG	Working Group

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

ESA, CARE and FERA	Summary Highlights
ESA Summary Table 1	Expenses, and Energy and Demand Savings Summary
ESA Table 1	ESA Main (SF, MH, MF In-Unit) Overall Program Expenses
ESA Table 1A	Program Expenses Summary
ESA Table 2	ESA Main Expenses and Energy Savings by Measures Installed (SF, MH, MF In-Unit)
ESA Table 2A	MF CAM Initiative Expenses and Energy Savings by Measures Installed
ESA Table 2B	MFWB Expenses and Energy Savings by Measures Installed
ESA Table 2C	PP/PD Expenses and Energy Savings by Measures Installed
ESA Table 2D	Building Electrification Expenses and Energy Savings by Measures Installed (SCE Only)
ESA Table 2E	Clean Energy Homes Expenses and Energy Savings by Measures Installed (SCE Only)
ESA Table 2F	CSD Leveraging Expenses and Energy Savings by Measures Installed
ESA Table 3	Program Cost Effectiveness
ESA Table 4	Detail by Housing Type and Source
ESA Table 5	Direct Purchases & Installation Contractors
ESA Table 6	Installation Cost of Program Installation Contractors
ESA Table 7	Expenditures Recorded by Cost Element
ESA Table 8	Homes Unwilling / Unable to Participate
ESA Table 9	Energy Rate Used for Bill Savings Calculations
ESA Table 10	Bill Savings Calculations by Program Year
ESA Table 11	Fund Shifting
ESA Table 12	Categorical and Other Enrollment
ESA Table 13A	Leveraging & Integration
ESA Table 13B	Clean Energy Referral, Leveraging, and Coordination
ESA Table 14	Expenditures for Pilots and Studies
ESA Table 15	Tribal Outreach
ESA Table 16	Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions

CARE Table 1	Overall Program Expenses
CARE Table 2	Enrollment, Recertification, Attrition, & Enrollment
CARE Table 3	Post-Enrollment Verification Results
CARE Table 4	Self-Certification and Self-Recertification Applications
CARE Table 5	Enrollment by County
CARE Table 6	Recertification Results
CARE Table 7	Capitation Contractors
CARE Table 8	Participants as of Month-End
CARE Table 9	Average Monthly Usage & Bill
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CARE Table 11	Capitation Applications
CARE Table 12	Expansion Program
CARE Table 13	High Usage Verification Results
CARE Table 14	Customer Usage and ESA Program Treatment
CARE Table 15	Categorical Enrollment
CARE Table 16	CARE and Disadvantaged Communities Enrollment Rate for Zip Codes

FERA Table 1	Overall Program Expenses
FERA Table 2	Enrollment, Recertification, Attrition, & Enrollment
FERA Table 3	Post-Enrollment Verification Results
FERA Table 4	Self-Certification and Self-Recertification Applications
FERA Table 5	Enrollment by County
FERA Table 6	Recertification Results
FERA Table 7	Capitation Contractors
FERA Table 8	Average Monthly Usage & Bill

Pacific Gas and Electric Company
Energy Savings Assistance (ESA) Program
California Alternate Rates for Energy (CARE) Program and Family Electric Rate Assistance (FERA) Program
2023 Summary Highlights

ESA Program

2023 ESA Program Summary [1]			
2023	**Authorized / Forecasted Planning Assumptions**	**Actual**	**%**
Budget	$ 229,548,254	$ 132,503,894	58%
Summary Homes Treated	60,437	65,518	108%
Summary kWh Saved	35,773,079	28,694,608	80%
Summary kW Demand Reduced	3,238	6,738	208%
Summary Therms Saved	1,458,655	1,276,687	88%

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

CARE Program

2023 CARE Program Summary			
2023	**Authorized Budget**	**Actual**	**%**
Administrative Expenses	$ 13,961,600	$ 9,534,834	68%
Subsidies	$ 691,973,000	$ 978,126,461	141%
Service Establishment Charge	$ -	$ -	n/a
Total Program Costs and Discounts	**$ 705,934,600**	**$ 987,661,295**	**140%**
2023 CARE New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc**	**Self Certified as Income or Categorically Eligible**	**Self Certified as Recertification**
Method	16,090	258,201	668,402
2023 CARE Enrollment Rate	**Estimated Eligible Participants**	**Participants**	**Enrollment Rate**
Total Enrolled	**1,402,162**	**1,402,942**	**100%**

FERA Program

2023 FERA Program Summary			
2023	**Authorized Budget**	**Actual**	**%**
Administrative Expenses	$ 2,846,400	$ 2,685,829	94%
Subsidies	$ 15,727,000	$ 17,148,000	109%
Service Establishment Charge	$ -	$ -	n/a
Total Program Costs and Discounts	**$ 18,573,400**	**$ 19,833,830**	**107%**
2023 FERA New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc**	**Self Certified as Income or Categorically Eligible**	**Self Certified as Recertification**
Method	345	13,963	10,625
2023 FERA Enrollment Rate	**Estimated Eligible Participants**	**Participants**	**Enrollment Rate**
Total Enrolled	**163,489**	**38,295**	**23%**

ESA Summary Table 1 - Expenses, and Energy and Demand Savings Summary
Pacific Gas and Electric Company
Program Year 2023 Annual Report

ESA Table 1A - Expenses Summary

ESA Program Expenses:	Authorized Budget			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Main Program (SF and MH) [1]	$ 67,018,364	$ 60,722,195	$ 127,740,559	$ 53,684,174	$ 66,191,950	$ 119,876,124	80%	109%	94%
ESA Multifamily In-Unit [2]	$ 9,779,830	$ 8,672,679	$ 18,452,509	$ 843,082	$ 1,592,841	$ 2,435,923	9%	18%	13%
ESA Multifamily Common Area Measures	$ 25,350,516	$ 13,414,202	$ 38,764,717	$ 204,570	$ 208,999	$ 413,569	1%	2%	1%
ESA Multifamily Whole Building	$ 8,820,698	$ 7,822,129	$ 16,642,827	$ 2,815,385	$ 2,496,662	$ 5,312,048	32%	32%	32%
ESA Pilot Plus and Pilot Deep	$ 8,810,798	$ 7,813,348	$ 16,624,146	$ 2,186,725	$ 1,939,171	$ 4,125,896	25%	25%	25%
Building Electrification Retrofit Pilot [3]	-	-	-	-	-	-	0%	0%	0%
Clean Energy Homes New Construction Pilot [3]	-	-	-	-	-	-	0%	0%	0%
CSD Leveraging	$ 558,934	$ 495,658	$ 1,054,592	$ 324	$ 378	$ 702	0%	0%	0%
MCE Pilot	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
SPOC	$ 469,234	$ 233,253	$ 702,488	$ 180,005	$ 159,627	$ 339,632	38%	68%	48%
SASH and MASH Unspent Funds [4]	$ 9,566,416	$ -	$ 9,566,416	$ -	$ -	$ -	0%	0%	0%
ESA Program TOTAL	**$ 130,374,789**	**$ 99,173,465**	**$ 229,548,254**	**$ 59,914,265**	**$ 72,589,629**	**$ 132,503,894**	**46%**	**73%**	**58%**

[1] ESA Main expenses in PY 2023 includes costs for single homes, mobile homes, and multifamily in-units prior to the implementation of Multifamily Whole Building (MFWB) program in June 2023.

[2] ESA Multifamily In-Unit costs begin to record separately from ESA Main Program after the implementation of Multifamily Whole Building program in June 2023.

[3] Pilots are applicable to SCE only.

[4] OP 12 of D.15-01-027 states "The Program Administrators shall ensure that program expenditures in each utility's service territory do not exceed the total authorized budget amounts over the duration of the programs. The program incentive budgets will be available until all funds are exhausted or until December 31, 2021, whichever occurs first. Any money unspent and unencumbered on January 1, 2022, shall be used for "cost-effective energy efficiency measures in low-income residential housing that benefit ratepayers," as set forth in Public Utilities Code Section 2852(c)(3)." On September 20, 2023, SCE and PG&E jointly submitted an AL 7028-E to recover IOUs administrative costs for SASH/MASH, transfer unspent funds from the SASH and/or MASH programs to the ESA program, and dispose of the remaining funds in the IOUs' California Solar Initiative Balancing Accounts. AL 7028-E was disposed and effective on October 20, 2023.

ESA Table 1B - Energy and Demand Savings

ESA Program Savings:	Authorized / Forecasted Planning Assumptions			Actual			%		
	kWh	kW	Therms	kWh	kW	Therms	kWh	kW	Therms
ESA Main Program (SF and MH) [1]	35,773,079	3,238	1,458,655	28,694,608	6,738	1,276,687	80%	193%	88%
ESA Multifamily In-Unit [2]	-	-	-	-	-	-	-	-	-
ESA Multifamily Common Area Measures	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ESA Multifamily Whole Building	3,794,344	N/A	253,022	499,590	60	36,319	13%	N/A	14%
ESA Pilot Plus and Pilot Deep [3]	-	-	-	47,592	56	4,796	-	-	-
Building Electrification Retrofit Pilot [4]	-	-	-	-	-	-	-	-	-
Clean Energy Homes New Construction Pilot [4]	-	-	-	-	-	-	-	-	-
CSD Leveraging	0	0	0	0	0	0	0%	0%	0%
ESA Program TOTAL	**39,567,423**	**3,238**	**1,711,677.00**	**29,241,790**	**6,854.40**	**1,317,802.41**	**74%**	**212%**	**77%**

[1] Energy and demand savings for PY 2023 includes ESA Main and Multifamily In-Unit.

[2] The ESA Multifamily In-Unit energy and demand savings are included in the ESA Main Program category.

[3] D.21-06-015 did not include kWh, kW or Therm targets for Pilot Plus/Deep.

[4] Pilots are applicable to SCE only.

	A	B	C	D	E	F	G	H	I	J
1	**ESA Table 1 - ESA Main (SF, MH, MF In-Unit) Overall Program Expenses**									
2	**Pacific Gas and Electric Company**									
3	**Program Year 2023 Annual Report**									
4										
5		**2023 Authorized / Forecasted Budget [1]**			**2023 Annual Expenses**			**% of Budget Spent**		
6	**ESA Program:**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
7	**Energy Efficiency**									
8	Appliances	$ 11,050,371	$ -	$ 11,050,371	$ 17,890,848	$ -	$ 17,890,848	162%	0%	162%
9	Domestic Hot Water	$ 1,323,574	$ 6,553,824	$ 7,877,398	$ 340,771	$ 8,824,083	$ 9,164,854	26%	135%	116%
10	Enclosure	$ 261,054	$ 25,844,250	$ 26,105,304	$ 269,913	$ 26,721,379	$ 26,991,292	103%	103%	103%
11	HVAC	$ 12,642,366	$ 7,937,839	$ 20,580,205	$ 13,665,786	$ 17,402,924	$ 31,068,710	108%	219%	151%
12	Maintenance	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
13	Lighting	$ 5,751,431	$ -	$ 5,751,431	$ 3,999,592	$ -	$ 3,999,592	70%	0%	70%
14	Miscellaneous	$ 12,931,454	$ -	$ 12,931,454	$ 2,583,036	$ -	$ 2,583,036	20%	0%	20%
15	Customer Enrollment	$ 9,313,285	$ 8,258,951	$ 17,572,235	$ 4,790,900	$ 4,248,534	$ 9,039,433	51%	51%	51%
16	In Home Education	$ 2,808,483	$ 2,490,542	$ 5,299,025	$ 2,479,202	$ 2,198,538	$ 4,677,740	88%	88%	88%
17	Pilot [2]	$ 395,314	$ 350,562	$ 745,876	$ (121,734)	$ (107,953)	$ (229,688)	0%	0%	0%
18	Implementation	$ 2,690,738	$ 2,386,126	$ 5,076,864	$ 2,558,303	$ 2,268,684	$ 4,826,987	0%	0%	0%
19	Safety - Unexpected overhead costs	$ -	$ -	$ -	$ (951)	$ (844)	$ (1,795)	0%	0%	0%
20	**Energy Efficiency TOTAL**	**$ 59,168,070**	**$ 53,822,094**	**$ 112,990,164**	**$ 48,455,665**	**$ 61,555,345**	**$ 110,011,010**	**82%**	**114%**	**97%**
21										
22	**Administration**									
23	Training Center	$ 226,150	$ 200,548	$ 426,698	$ 240,904	$ 213,632	$ 454,536	107%	107%	107%
24	Inspections	$ 2,076,749	$ 1,841,646	$ 3,918,395	$ 831,685	$ 737,532	$ 1,569,217	40%	40%	40%
25	Marketing and Outreach	$ 1,033,685	$ 916,664	$ 1,950,350	$ 1,178,109	$ 1,044,741	$ 2,222,850	114%	114%	114%
26	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
27	Measurement and Evaluation Studies [3]	$ 380,951	$ 276,344	$ 657,295	$ (23,184)	$ (20,559)	$ (43,743)	-6%	-7%	-7%
28	Regulatory Compliance	$ 316,168	$ 280,375	$ 596,543	$ 205,096	$ 181,878	$ 386,974	65%	65%	65%
29	General Administration	$ 3,782,809	$ 3,354,566	$ 7,137,375	$ 2,777,684	$ 2,463,229	$ 5,240,913	73%	73%	73%
30	CPUC Energy Division	$ 33,782	$ 29,958	$ 63,740	$ 18,214	$ 16,152	$ 34,366	54%	54%	54%
31	**Administration Subtotal**	**$ 7,850,294**	**$ 6,900,101**	**$ 14,750,395**	**$ 5,228,509**	**$ 4,636,605**	**$ 9,865,114**	**67%**	**67%**	**67%**
32										
33	**TOTAL PROGRAM COSTS**	**$ 67,018,364**	**$ 60,722,195**	**$ 127,740,559**	**$ 53,684,174**	**$ 66,191,950**	**$ 119,876,124**	**80%**	**109%**	**94%**
34	**Funded Outside of ESA Program Budget**									
35	Indirect Costs				-	-	$ -			
36	NGAT Costs					$ 5,285,321	$ 5,285,321			
37	[1] Budget authorized in D.21-06-015, Attachment 1, Table 8.									
38	[2] Reflects carry forward VEC Pilot budget from 2022 to 2023 E $223,064 / G $197,812 total $420,876									
39	[3] Reflects carry forward Studies budget from 2022 to 2023 E $225,926 / G $138,869 total $364,795									
40										

ESA Table 1A - Program Expenses Summary
Pacific Gas and Electric Company
Program Year 2023 Annual Report

ESA Table 1A-1 - Multifamily Whole Building Expenses

ESA Program (MFWB):	2023 Authorized / Forecasted Budget			2023 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Multifamily In-Unit	$ 9,779,830	$ 8,672,679	$ 18,452,509	$ 843,082	$ 1,592,841	$ 2,435,923	9%	18%	13%
ESA Multifamily Common Area Measures [1]	$ 25,350,516	$ 13,414,202	$ 38,764,717	$ 204,570	$ 208,999	$ 413,569	1%	2%	1%
ESA Multifamily Whole Building	$ 8,820,698	$ 7,822,129	$ 16,642,827	$ 2,815,385	$ 2,496,662	$ 5,312,048	32%	32%	32%
SPOC [2]	$ 469,234	$ 233,253	$ 702,488	$ 180,005	$ 159,627	$ 339,632	38%	68%	48%
TOTAL	**$ 44,420,278**	**$ 30,142,263**	**$ 74,562,541**	**$ 4,043,042**	**$ 4,458,129**	**$ 8,501,171**	**9%**	**15%**	**11%**

[1] Reflects committed MF CAM budget from 2022 to 2023 E $25,350,516 / G $13,414,202 total $38,764,717

[2] Reflects committed SPOC budget from 2022 to 2023 E $286,948 / G $71,603 total $358,550 for MF CAM efforts, plus the 2023 authorized SPOC budget E $182,287 / G $161,651 total $343,938 for MFWB program

ESA Table 1A-2 - Pilot Plus and Pilot Deep Expenses

	2023 Authorized / Forecasted Budget			2023 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Pilot Plus and Pilot Deep Program [1]	$ 8,810,798	$ 7,813,348	$ 16,624,146	$ 2,186,725	$ 1,939,171	$ 4,125,896	25%	25%	25%
TOTAL	**$ 8,810,798**	**$ 7,813,348**	**$ 16,624,146**	**$ 2,186,725**	**$ 1,939,171**	**$ 4,125,896**	**25%**	**25%**	**25%**

[1] Reflects carry forward Pilot Plus and Pilot Deep budget from 2022 to 2023 E $4,156,016 / G $3,685,523 total $7,841,539

ESA Table 1A-3 - Building Electrification Expenses (SCE Only) [1]

	2023 Authorized / Forecasted Budget			2023 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Building Electrification Program	$ -	$ -	$ -	$ -	$ -	$ -	-	-	-
TOTAL	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**-**	**-**	**-**

[1] This Pilot applicable to SCE only.

ESA Table 1A-4 - Clean Energy Homes Expenses (SCE Only) [1]

	2023 Authorized / Forecasted Budget			2023 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Clean Energy Homes Program	$ -	$ -	$ -	$ -	$ -	$ -	-	-	-
TOTAL	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**-**	**-**	**-**

[1] This Pilot is applicable to SCE only.

ESA Table 1A-5 - Leveraging - CSD Expenses

	2023 Authorized / Forecasted Budget			2023 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Program Leveraging - CSD [1]	$ 558,934	$ 495,658	$ 1,054,592	$ 324	$ 378	$ 702	0%	0%	0%
MCE Pilot	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
TOTAL	**$ 558,934**	**$ 495,658**	**$ 1,054,592**	**$ 324**	**$ 378**	**$ 702**	**0%**	**0%**	**0%**

[1] Expenditures for CSD Leveraging by end use is shown on ESA Table 2F.

ESA Table 2 - ESA Main (SF, MH, MF In-Unit) Expenses and Energy Savings by Measures Installed
Pacific Gas and Electric Company
Program Year 2023 Annual Report

ESA Main Program Totals
2023 Completed & Expensed Installation

	A	B	C	D	E	F	G	H	I	J	K	L
6	**Measures**	**Basic**	**Plus**	**Units**	**Quantity Installed**	**kWh [4] (Annual)**	**kW [4] (Annual)**	**Therms [4] (Annual)**	**Expenses ($)**	**% of Expenditures**	**Effective Useful Life (years)**	**2023 Total Measure Life Cycle Bill Savings**
7	**Appliances**											
8	High Efficiency Clothes Washer	-	√	Each	3,176	583,305	105	60,353	$ 3,084,413	2.9%	11	$ 1,898,200
9	Refrigerator	-	√	Each	12,537	7,054,057	987	-	$ 14,617,926	13.5%	15	$ 15,037,383
10	Clothes Dryer	-	√	Each	-	-	-	-	$ -	0.0%		
11	Dishwasher	-	N/A	Each	-	-	-	-	$ -	0.0%		
12	Freezers	-	N/A	Home	-	-	-	-	$ -	0.0%		
13	**Domestic Hot Water**											
14	Other Domestic Hot Water [5]	√	-	Home	49,038	226,356	31	242,036	$ 4,451,600	4.1%	8	$ 3,120,719
15	Water Heater Tank and Pipe Insulation	-	√	Home	5,530	11,259	-	22,043	$ 476,624	0.4%	8	$ 271,957
16	Water Heater Repair/Replacement	-	√	Home	2,001	-	-	15,639	$ 4,257,379	3.9%	15	$ 296,911
17	Low-Flow Showerhead / Combined Showerhead/TSV	√	-	Home	-	-	-	-	$ -	0.0%		
18	Heat Pump Water Heater	-	√	Each	116	193,793	98	-	$ 442,165	0.4%	10	$ 304,521
19	Thermostatic Tub Spout/Diverter	√	-	Each	934	-	-	981	$ 92,606	0.1%	8	$ 11,451
20	Thermostatic Shower Valve	√	-	Each	-	-	-	-	$ -	0.0%		
21	Solar Water Heating	-	N/A	Home	-	-	-	-	$ -	0.0%		
22	**Enclosure**											
23	Air Sealing [1]	-	√	Home	46,110	1,943,483	177	178,121	$ 25,575,403	23.7%	9	$ 5,095,873
24	Caulking	-	√	Home	-	-	-	-	$ -	0.0%		
25	Diagnostic Air Sealing	-	√	Home	-	-	-	-	$ -	0.0%		
26	Attic Insulation	-	√	Home	1,388	279,514	50	60,523	$ 2,544,025	2.4%	20	$ 2,112,570
27	Floor Insulation	-	√	Home	-	-	-	-	$ -	0.0%		
28	**HVAC [6]**											
29	FAU Standing Pilot Conversion	-	N/A	Home	-	-	-	-	$ -	0.0%		
30	Furnace Repair/Replacement	-	√	Each	1,848	-	-	(45,215)	$ 7,752,875	7.2%	16	$ (897,889)
31	Room A/C Replacement	-	√	Each	-	-	-	-	$ -	0.0%		
32	Central A/C replacement	-	√	Each	32	10,315	1.96	-	$ 136,234	0.1%	18	$ 24,890
33	Heat Pump Replacement	-	√	Each	1	1,024	-	-	$ 4,799	0.0%		
34	Evaporative Cooler (Replacement)	-	√	Each	(1)	(397)	(0)	-	$ -	0.0%	15	$ (847)
35	Evaporative Cooler (Installation)	-	N/A	Each	-	-	-	-	$ -	0.0%		
36	Duct Test and Seal	-	√	Home	213	13,611	7.23	3,976	$ 148,349	0.1%	25	$ 144,170
37	Energy Efficient Fan Control	-	N/A	Home	-	-	-	-	$ -	0.0%		
38	New - Prescriptive Duct Sealing	-	√	Home	33,770	4,214,773	3,048	324,966	$ 16,027,851	14.8%	25	$ 20,906,665
39	High Efficiency Forced Air Unit (HE FAU)	-	√	Home	52	-	-	1,901	$ 272,707	0.3%		
40	A/C Time Delay	-	√	Home	(5)	(989)	(1)	(166)	$ -	0.0%	10	$ (3,882)
41	Smart Thermostat	-	√	Home	15,838	3,071,633	553	423,821	$ 3,617,066	3.3%	9	$ 9,883,586
42	Portable A/C	-	√	Each	24	-	-	-	$ 12,413	0.0%	9	$ -
43	Central Heat Pump-FS (propane or gas space)	-	N/A	Home	-	-	-	-	$ -	0.0%		
44	Wholehouse Fan	-	√	Each	9	1,637	2	(5)	$ 12,350	0.0%	20	$ 4,100
45	Blower Motor Retrofit	-	N/A	Each	-	-	-	-	$ -	0.0%		
46	**Maintenance**											
47	Furnace Clean and Tune	-	N/A	Home	-	-	-	-	$ -	0.0%		
48	Central A/C Tune up	-	√	Home	9,367	1,282,751	1,435	(1,516)	$ 2,866,381	2.7%	15	$ 2,705,708
49	New - Evaporative Cooler Maintenance	-	N/A	Home	-	-	-	-	$ -	0.0%		
50	**Lighting**											
51	Interior Hard wired LED fixtures	-	√	Each	36	1,506	0	(41)	$ 3,024	0.0%	16	$ 2,543
52	Exterior Hard wired LED fixtures	-	√	Each	1,517	7,937	(0)	-	$ 87,550	0.1%	16	$ 17,696
53	LED Torchiere	√	-	Each	(55)	(3,942)	(1)	81	$ 287	0.0%	16	$ (7,184)
54	Occupancy Sensor	-	√	Each	(6)	(668)	(0)	-	$ -	0.0%	8	$ (875)
55	LED Night Light	N/A	-	Each	-	-	-	-	$ -	0.0%		
56	LED Reflector Bulbs	√	-	Each	52,183	593,509	14	(1,265)	$ 430,469	0.4%	16	$ 1,298,217
57	LED A-Lamps	√	-	Each	415,508	3,990,907	91	(9,561)	$ 3,414,223	3.2%	16	$ 8,708,589
58	**Miscellaneous**											
59	Pool Pumps	-	√	Each	251	274,325	38	-	$ 483,172	0.4%	10	$ 431,068
60	Power Strip	√	-	Each	28	(170)	(0)	-	$ -	0.0%	5	$ (148)
61	Power Strip Tier II	√	-	Each	27,488	4,945,079	100	15	$ 2,109,288	2.0%	5	$ 4,313,455
62	NEW - Air Purifier	-	√	Home	627	-	-	-	$ 153,776	0.1%	9	$ -
63	Cold Storage	-	√	Each	50	-	-	-	$ 15,845	0.0%	5	$ -
64	Comprehensive Home Health and Safety Check-up	-	N/A	Home	-	-	-	-	$ -	0.0%		
65	CO and Smoke Alarm	-	√	Each	-	-	-	-	$ -	0.0%		
66	**Pilots**											
67	-	-	-	-	-	-	-	-	-	-		
68	**Customer Enrollment**											
69	ESA Outreach & Assessment	√	√	Home	65,518	-	-	-	$ 9,923,180	9.2%		
70	ESA In-Home Energy Education	√	√	Home	65,518	-	-	-	$ 5,114,361	4.7%		
71												
72	**Total Savings/Expenditures**	-	-			**28,694,608**	**6,738**	**1,276,687**	**$ 108,128,342**	**100%**		**$ 75,679,447**
73												
74	**Total Households Weatherized [2]**	-	-		**54,912**							
75												
76	**Households Treated**											
77	- Single Family Households Treated			Home	55,797							
78	- Multi-family Households Treated			Home	3,432							
79	- Mobile Homes Treated			Home	6,289							
80	**Total Number of Households Treated**			**Home**	**65,518**							
81	**# Eligible Households to be Treated for PY [3]**			Home	60,437							
82	**% of Households Treated**			%	108%							
83	- Master-Meter Households Treated			Home	3,244							

84 [1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.
85 [2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.
86 [3] Based on D.21-06-015 Attachment 1, Table 6 targets.
87 [4] Savings estimates are sourced from the most recent ESA Impact Evaluation; measures not included in the Impact Evaluation utilize values from workpapers.
88 [5] Other Domestic Hot Water includes the following parts: Faucet Aerator, Low Flow Showerhead, and Thermostatic shower valve.
89 [6] Savings for HVAC measures vary by CZ and is averaged in these tables.
90

				Year to Date Expenses			
92	**ESA Main Program**			**Electric**	**Gas**	**Total**	
93	**Administration [7]**			$ 5,228,509	$ 4,636,605	$ 9,865,114	
94	**Direct Implementation (Non-Incentive) [8]**			$ 2,558,303	$ 2,268,684	$ 4,826,987	
95	**Direct Implementation [9]**			$ 45,897,362	$ 59,286,661	$ 105,184,023	*<<Includes measures costs*
96							
97	**TOTAL ESA Main COSTS**			**$ 53,684,174**	**$ 66,191,950**	**$ 119,876,124**	

98 [7] Administrative includes expenses from Training Center, Inspections, Marketing and Outreach, Studies, Regulatory Compliance, General Administrative, and CPUC Energy Division categories.
99 [8] Direct Implementation (Non-Incentive) includes expenses from Implementation category.
100 [9] Direct Implementation includes expenses from Appliances, Domestic Hot Water, Enclosure, HVAC, Lighting, Miscellaneous, Customer Enrollment, In-Home Education, Safety Unexpected Overhead Costs, and VEC Pilot.

ESA Table 2A - Multifamily Common Area Measures Initiative Expenses and Energy Savings by Measures Installed
Pacific Gas and Electric Company
Program Year 2023 Annual Report

ESA Multifamily Common Area Measures Program Totals [1]
2023 Completed and Expensed Installation

ESA MF CAM Measures	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses ($)	% of Expenditure	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings
Appliances										
High Efficiency Clothes Washer	Each	0	0	0	0	0	$ -	0.0%	0	0
Refrigerator	Each	0	0	0	0	0	$ -	0.0%	0	0
Domestic Hot Water										
Non-Condensing Domestic Hot Water Boiler	Cap-kBtuh	0	0	0	0	0	$ -	0.0%	0	0
Condensing Domestic Hot Water Boiler	Cap-kBtuh	0	0	0	0	0	$ -	0.0%	0	0
Storage Water Heater	Cap-kBtuh	0	0	0	0	0	$ -	0.0%	0	0
Tankless Water Heater	Cap-kBtuh	0	0	0	0	0	$ -	0.0%	0	0
Heat Pump Water Heater	kW	0	0	0	0	0	$ -	0.0%	0	0
Demand Control DHW Recirculation Pump	Each	0	0	0	0	0	$ -	0.0%	0	0
Low flow Showerhead	Each	0	0	0	0	0	$ -	0.0%	0	0
Faucet Aerator	Each	0	0	0	0	0	$ -	0.0%	0	0
Envelope										
Attic Insulation	Sq Ft	0	0	0	0	0	$ -	0.0%	0	0
Wall Insulation Blow-in	Sq Ft	0	0	0	0	0	$ -	0.0%	0	0
Windows	Sq Ft	0	0	0	0	0	$ -	0.0%	0	0
Window Film	Sq Ft	0	0	0	0	0	$ -	0.0%	0	0
HVAC										
Air Conditioners Split System	Cap-Tons	0	0	0	0	0	$ -	0.0%	0	0
Heat Pump Split System	Cap-Tons	0	0	0	0	0	$ -	0.0%	0	0
Packaged Air Conditioner	Cap-Tons	0	0	0	0	0	$ -	0.0%	0	0
Package Terminal A/C	Cap-Tons	0	0	0	0	0	$ -	0.0%	0	0
Package Terminal Heat Pump	Cap-Tons	0	0	0	0	0	$ -	0.0%	0	0
Furnace Replacement	Cap-kBtuh	0	0	0	0	0	$ -	0.0%	0	0
Space Heating Boiler	Cap-kBtuh	0	0	0	0	0	$ -	0.0%	0	0
Smart Thermostat	Each	0	0	0	0	0	$ -	0.0%	0	0
Lighting										
Interior LED Lighting	Each	0	0	0	0	0	$ -	0.0%	0	0
Interior TLED Type A Lamps	Each	0	0	0	0	0	$ -	0.0%	0	0
Interior TLED Type C Lamps	Each	0	0	0	0	0	$ -	0.0%	0	0
LED T8 Lamp - Interior	Each	0	0	0	0	0	$ -	0.0%	0	0
LED T8 Lamp - Exterior	Each	0	0	0	0	0	$ -	0.0%	0	0
Interior LED Fixture	Each	0	0	0	0	0	$ -	0.0%	0	0
Interior LED Screw-in	Each	0	0	0	0	0	$ -	0.0%	0	0
Interior LED Exit Sign	Each	0	0	0	0	0	$ -	0.0%	0	0
Exterior LED Lighting	Each	0	0	0	0	0	$ -	0.0%	0	0
LED Parking Garage Fixtures	Each	0	0	0	0	0	$ -	0.0%	0	0
LED Exterior Wall or Pole Mounted Fixture	Each	0	0	0	0	0	$ -	0.0%	0	0
LED Corn Lamp for Exterior Wall or Pole Mounted	Each	0	0	0	0	0	$ -	0.0%	0	0
Exterior LED Lighting - Pool	Each	0	0	0	0	0	$ -	0.0%	0	0
Wall or Ceiling Mounted Occupancy Sensor	Each	0	0	0	0	0	$ -	0.0%	0	0
Miscellaneous										
Tier-2 Smart Power Strip	Each	0	0	0	0	0	$ -	0.0%	0	0
Variable Speed Pool Pump	Each	0	0	0	0	0	$ -	0.0%	0	0
Ancillary Services										
Audit [2]	-	0	0	0	0	0	$ -	0.0%	0	0
Total		-	-	-	-	-	**$ -**		-	-

[1] Measures are customized by each utility. Measures list may change based on available information on both costs and benefits and may vary across climate zones.
[2] Audit costs may be covered by other programs or projects may utilize previous audits. Not all participants will have an audit cost associated with their project.

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated [2]	0
Subtotal of Master-metered Multifamily Properties Treated	0
Total Number of Multifamily Tenant Units w/in Properties Treated [3]	0
Total Number of buildings w/in Properties Treated	**0**

[2] Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings.

[3] Multifamily tenant units are the number of dwelling units located within properties treated. This number does not represent the same number of dwellings treated as captured in Table 2 nor 2A.

	Year to Date Expenses			
ESA Program - MF CAM [5]	**Electric**	**Gas**	**Total**	
Administration	$ 130,697	$ 115,901	$ 246,598	
Direct Implementation (Non-Incentive)	$ 88,407	$ 78,399	$ 166,805	
Direct Implementation	$ (14,534)	$ 14,699	$ 165	*<<Includes measures costs*
SPOC	$ 43,083	$ 38,206	$ 81,289	
TOTAL MF CAM COSTS [6]	**$ 247,654**	**$ 247,205**	**$ 494,858**	

[5] Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022, modified by D.17-12-009, where 65% of tenants are income eligible based (at or below 200% of the Federal Poverty Guidelines).

[6] Commissioning costs, as allowable per the Decision, are included in measures total cost unless otherwise noted. Year to Date Expenses table includes accrual amounts. No direct implementation cost expense for 2023 since the program was sunset and is not treating any new projects in 2023. The 2023 expenses are residual costs for the program

Notes:
*Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.
**Implementation of the MF CAM Initiative AL 3196-E-A_2654-G-A was approved effective 5/30/2018.

ESA Table 2B - Multifamily Whole Building Expenses and Energy Sav
Pacific Gas and Electric Company
Program Year 2023 Annual Report

ESA Multifamily Whole Building Program Tot
2023 Completed & Expensed Installation

	A	B	C	D	E	F	G	H
6	**Measures**	**Units (of Measure such as "each")** [5]	**Measure Type (In-unit vs CAM/WB)** [4]	**Quantity Installed**	**Number of Units for Cap-kBTUh and Cap-Tons**	**kWh (Annual)**	**kW (Annual)**	**Therms (Annual)**
7	**Appliances**							
8	High Efficiency Clothes Washer	Each	In-Unit	-	-	-	-	-
9	Refrigerators	Each	In-Unit	102	-	22,151	3	-
10						-	-	-
11	**Domestic Hot Water**							
12	New: Non-Condensing Domestic Hot Water Boiler	Cap-kBtuh	CAM/WB	-	-	-	-	-
13	New: Condensing Domestic Hot Water Boiler	Cap-kBtuh	CAM/WB	-	-	-	-	-
14	Storage Water Heater	Cap-kBtuh	CAM/WB	-	-	-	-	-
15	Tankless Water Heater	Cap-kBtuh	CAM/WB	-	-	-	-	-
16	Heat Pump Water Heater	kW	CAM/WB	-	-	-	-	-
17	Demand Control DHW Recirculation Pump	Each	CAM/WB	-	-	-	-	-
18	Low flow Showerhead	Each	CAM/WB	-	-	-	-	-
19	Faucet Aerator	Each	CAM/WB	-	-	-	-	-
20	Other Hot Water	Household	In-Unit	11,523	-	8,864	1.24	19,570.16
21	Thermostatic Tub Spout/Diverter	Each	In-Unit	128	-	-	-	169.40
22	Water Heater Tank and Pipe Insulation	Household	In-Unit	221	-	810	-	434.14
23	Water Heater Repair/Replacement	Household	In-Unit	200	-	-	-	257.91
24	Heat Pump Water Heater	Each	In-Unit	-	-	-	-	-
25	Hot Water Pipe Insulation	Each	CAM/WB	-	-	-	-	-
26	Boiler Controls	Each	CAM/WB	-	-	-	-	-
27					-	-	-	-
28	**Envelope**				-			
29	Whole Building Attic Insulation	Sq Ft	CAM/WB	-	-	-	-	-
30	Wall Insulation Blow-in	Sq Ft	CAM/WB	-	-	-	-	-
31	Windows	Sq Ft	CAM/WB	-	-	-	-	-
32	Window Film	Sq Ft	CAM/WB		-	-	-	-
33	Air Sealing	Household	In-Unit	53,920	-	113,022	10.32	5,996.00
34	Attic Insulation	Household	In-Unit	4,635	-	2,676	0.48	285.49
35					-			
36	**HVAC**				-			
37	Air Conditioners Split System	Cap-Tons	CAM/WB	-	-	-	-	-
38	Heat Pump Split System	Cap-Tons	CAM/WB	-	-	-	-	-
39	New: Packaged Air Conditioner	Cap-Tons	CAM/WB	-	-	-	-	-
40	Package Terminal A/C	Cap-Tons	CAM/WB	-	-	-	-	-
41	Package Terminal Heat Pump	Cap-Tons	CAM/WB	-	-	-	-	-
42	Furnace Replacement	Cap-kBtuh	CAM/WB	-	-	-	-	-
43	Space Heating Boiler	Cap-kBtuh	CAM/WB		-			-
44	Smart Thermostats	Each	In-Unit	421	-	84,403	15.19	10,337.80
45	Furnace Repair/Replacement	Each	In-Unit	419	-	-	-	(377.00)
46	Central A/C Replacement	Each	In-Unit	-	-	-	-	-
47	High Efficiency Forced Air Unit (HE FAU)	Each	In-Unit	-	-	-	-	-
48	Portable A/C	Each	In-Unit	-	-	-	-	-
49	Central A/C Tune up	Each	In-Unit	757	-	37,426	23.19	(15.61)
50	Blower Motor Retrofit	Each	CAM/WB	-	-	-	-	-
51	Efficient Fan Controller	Each	CAM/WB	-	-	-	-	-
52					-			-
53	**Lighting**				-			
54	Interior LED Lighting	Each	CAM/WB	-	-	-	-	-
55	Interior TLED Type A Lamps	Each	CAM/WB	-	-	-	-	-
56	Interior TLED Type C Lamps	Each	CAM/WB	-	-	-	-	-
57	New: LED T8 Lamp - Interior	Each	CAM/WB	-	-	-	-	-
58	New: LED T8 Lamp - Exterior	Each	CAM/WB	-	-	-	-	-
59	Interior LED Fixture	Each	CAM/WB	-	-	-	-	-
60	Interior LED Screw-in	Each	CAM/WB	-	-	-	-	-
61	Interior LED Exit Sign	Each	CAM/WB	-	-	-	-	-
62	Exterior LED Lighting	Each	CAM/WB	-	-	-	-	-
63	New: LED Parking Garage Fixtures	Each	CAM/WB	-	-	-	-	-
64	LED Exterior Wall or Pole Mounted Fixture	Each	CAM/WB	-	-	-	-	-
65	LED Corn Lamp for Exterior Wall or Pole Mounted	Each	CAM/WB	-	-	-	-	-
66	Exterior LED Lighting - Pool	Each	CAM/WB	-	-	-	-	-
67	Wall or Ceiling Mounted Occupancy Sensor	Each	CAM/WB	-	-	-	-	-
68	LED Diffuse A-Lamps	Each	In-Unit	14,889	-	142,979	3.51	(337.98)
69	LED Reflector Bulbs	Each	In-Unit	75	-	852	0.02	(1.79)
70					-			-
71	**Miscellaneous**							
72	Tier-2 Smart Power Strip	Each	In-Unit	528	-	86,408	3.11	-
73	Variable Speed Pool Pump	Each	CAM/WB	-	-	-	-	-
74	Smart Power Strip Tier II	Each	CAM/WB	-	-	-	-	-
75	Cold Storage	Each	In-Unit	-	-	-	-	-
76	Air Purifier	Home	In-Unit	50	-	-	-	-
77	CO and Smoke Alarm	Each	In-Unit	-	-	-	-	-
78	CO and Smoke Alarm	Each	CAM/WB	-	-	-	-	-
79	Minor Repair	Each	CAM/WB	-	-	-	-	-
80					-			-
81	**Electrification**							
82	New - Central Heat Pump-FS (propane or gas space)	Each	In-Unit	-	-	-	-	-
83	Heat Pump Clothes Dryer - FS	Each	In-Unit	-	-	-	-	-
84	Induction Cooktop - FS	Each	In-Unit	-	-	-	-	-
85	Ductless Mini-split Heat Pump - FS	Each	In-Unit	-	-	-	-	-
86	Heat Pump Water Heater - FS	Each	In-Unit	-	-	-	-	-
87	Heat Pump Pool Heater - FS	Each	CAM/WB	-	-	-	-	-
88	Ductless Mini Split - FS	Each	CAM/WB	-	-	-	-	-
89	Heat Pump Water Heater - FS	Each	CAM/WB	-	-	-	-	-
90								
91	**Customer Enrollment - In Unit**							
92	ESA Outreach & Assessment	Household	In-Unit	6,974				
93	ESA In-Home Energy Education	Household	In-Unit	4,885				
94	**Ancillary Services**							
95	Audit [6]							
96								
97	**Total**	-		99,727	-	499,590	60	36,319
98								

99	**Multifamily Properties Treated**	**Number**
100	**Total Number of Multifamily Properties Treated** [2]	0
101	**Subtotal of Master-metered Multifamily Properties Treated**	0
102	**Total Number of Multifamily Tenant Units w/in Properties Treated** [3]	0
103	**Total Number of buildings w/in Properties Treated**	0

104

105	**Multifamily Households Treated (In-Unit)**	**Number**
106	**Total Number of Households Individually Treated**	3,468

107

108	**ESA Program - MFWB**	**Year to Date Expenses**		
109		**Electric**	**Gas**	**Total**
110	**Administration**	$ 1,650,234	$ 1,463,415	$ 3,113,649
111	**Direct Implementation (Non-Incentive)**	$ 1,165,151	$ 1,033,247	$ 2,198,398
112	**Direct Implementation**	$ 843,082	$ 1,592,841	$ 2,435,923
113	**SPOC**	$ 136,921	$ 121,421	$ 258,342
114				
115	**TOTAL MFWB COSTS**	$ 3,795,388	$ 4,210,924	$ 8,006,313

<<Includes measures costs

116 [1] PG&E has updated the savings values of Other Hot Water(line 20) and Air Sealing (line 33) measures installations from the December's monthly report. PG&E also underreported the total in-unit tre
117 monthly report, the treatment number has been updated in this annual report. Energy savings for HVAC measures vary by climate zones, the value used in this table is the average savings across clima

118 [2] Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings.
119 [3] Multifamily tenant units are the number of dwelling units located within properties treated. This number does not represent the same number of dwellings treated as captured in table 2A.
120 [4] Measure type column added to identify if a measure is for in-unit or common area/whole building because they use different workpaper savings.
121 [5] This represents the unit of measure such as Cap Tons and Cap kBTUh. It is not a count of each measure installed or each home the measure was installed in.
122 [6] Audit costs may be covered by other programs or projects may utilize previous audits. Not all participants will have an audit cost associated with their project.
123 Notes:
124 Commissioning costs, as allowable per the Decision, are included in measures total cost unless otherwise noted.
125 Total MFWB YTD expenses are reported in ESA Table 1A.
126 Any required corrections/adjustments are reported herein and supersede results reported in monthly reports and may reflect end of year adjustments.
127 Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are income eligible based on CPUC income requirements of at or below 250% of the Federal Poverty Guidelines.

ESA Table 2C - Pilot Plus and Pilot Deep Expenses and Energy Savings by Measures Installed
Pacific Gas and Electric Company
Program Year 2023 Annual Report

	ESA Program - Pilot Plus										ESA Program - Pilot Deep									
		2023 Completed & Expensed Installation [1]										2023 Completed & Expensed Installation [1]								
Measures[2]	Units (Each or Home)	Quantity Installed	kWh [3] (Annual)	kW [3] (Annual)	Therms [3] (Annual)	Expenses ($) [4]	% of Expenditures	Effective Useful Life (years)[5]	2023 Total Measure Life Cycle Bill Savings		Units (Each or Home)	Quantity Installed	kWh [3] (Annual)	kW [3] (Annual)	Therms [3] (Annual)	Expenses ($) [4]	% of Expenditures	Effective Useful Life (years)[5]	2023 Total Measure Life Cycle Bill Savings
Appliances																				
Efficient Electric Dryer	Each	3	861	-	13	$ 3,903	1.2%	12.00	$ 1,774.08		Each	1	452	-	(2)	$ 958	0.3%	12.00	$ 790.71
Heat Pump Dryer	Each	-	-	-	-	$ -	0.0%	12.00	$ -		Each	-	-	-	-	$ -	0.0%	12.00	$ -
High Efficiency Clothes Washers	Each	1	(14)	0.1	0	$ 1,500	0.5%	11.00	$ (18.51)		Each	1	(36)	0.2	19	$ 958	0.3%	11.00	$ 231.42
Induction Cooktop/Range	Each	-	-	-	-	$ -	0.0%	10.00	$ -		Each	1	96	(0.0)	(1)	$ 779	0.2%	10.00	$ 139.54
Pool Pump Retrocommissioning (RCx)	Each	-	-	-	-	$ -	0.0%	4.00	$ -		Each	-	-	-	-	$ -	0.0%	4.00	$ -
Pool Pump Replacement	Each	-	-	-	-	$ -	0.0%	10.00	$ -		Each	1	477	1.1	-	$ 1,394	0.4%	10.00	$ 749.13
Refrigerator	Each	4	1,085	0.4	(14)	$ 5,684	1.7%	14.00	$ 1,939.94		Each	2	335	0.0	(5)	$ 3,964	1.1%	14.00	$ 590.59
Standard Electrc Range	Each	-	-	-	-	$ -	0.0%	10.00	$ -		Each	-	-	-	-	$ -	0.0%	10.00	$ -
Tier 2 Adv Power Strip w Bluetooth	Each	12	1,944	-	-	$ 98	0.0%	5.00	$ 1,695.75		Each	3	486	-	-	$ 42	0.0%	5.00	$ 423.94
Domestic Hot Water																				
Combined Showerhead/TSV	Each	-	-	-	-	$ -	0.0%	10.00	$ -		Each	-	-	-	-	$ -	0.0%	10.00	$ -
Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%	10.00	$ -		Each	-	-	-	-	$ -	0.0%	10.00	$ -
Heat Pump Water Heater - Fuel Sub	Each	-	-	-	-	$ -	0.0%	10.00	$ -		Each	-	-	-	-	$ -	0.0%	10.00	$ -
Heat Pump Water Heater - Fuel Sub (120V)	Each	-	-	-	-	$ -	0.0%	12.00	$ -		Each	-	-	-	-	$ -	0.0%	12.00	$ -
Low Flow Faucet Aerator	Each	4	26	-	18	$ 48	0.0%	8.00	$ 248.59		Each	2	13	-	9	$ 32	0.0%	8.00	$ 124.30
Low Flow Showerhead	Each	2	13	-	9	$ 37	0.0%	8.00	$ 124.30		Each	2	13	-	9	$ 37	0.0%	8.00	$ 124.30
Storage Water Heater	Each	14	143	-	476	$ 32,960	10.1%	15.00	$ 9,341.80		Each	18	-	-	765	$ 42,219	11.9%	15.00	$ 14,533.09
Tankless On-Demand	Each	-	-	-	-	$ -	0.0%	15.00	$ -		Each	-	-	-	-	$ -	0.0%	15.00	$ -
Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%	10.00	$ -		Each	-	-	-	-	$ -	0.0%	10.00	$ -
Tub Diverter/ Tub Spout	Each	-	-	-	-	$ -	0.0%	7.00	$ -		Each	-	-	-	-	$ -	0.0%	7.00	$ -
Water Heater Blanket	Each	1	-	0.0	2	$ 165	0.1%	8.00	$ 22.80		Each	1	-	0.0	-	$ 120	0.0%	8.00	$ -
Water Heater Pipe Insulation	Len. Ft	-	-	-	-	$ -	0.0%	8.00	$ -		Len. Ft	-	-	-	-	$ -	0.0%	8.00	$ -
Enclosure																				
Attic Insulation	Home	17	2,247	12.8	460	$ 32,582	10.0%	20.00	$ 16,372.28		Home	16	2,688	16.4	615	$ 29,426	8.3%	20.00	$ 21,072.00
Diagnostic Air Sealing	Home	14	(153)	0.7	183	$ 13,838	4.2%	20.00	$ 3,804.64		Home	9	(0)	1.3	103	$ 6,450	1.8%	20.00	$ 2,369.07
Exterior Wall Insulation	Home	-	-	-	-	$ -	0.0%	20.00	$ -		Home	-	-	-	-	$ -	0.0%	20.00	$ -
Floor Insulation	Home	-	-	-	-	$ -	0.0%	20.00	$ -		Home	1	(219)	-	71	$ 2,099	0.6%	20.00	$ -
HVAC																				
Central Air Conditioner (A/C)	Each	20	12,855	5.6	-	$ 102,455	31.4%	18.00	$ 31,019.01		Each	23	16,498	4.4	-	$ 123,082	34.6%	18.00	$ 39,809.25
Fan Controller for A/C	Each	-	-	-	-	$ -	0.0%	5.00	$ -		Each	-	-	-	-	$ -	0.0%	5.00	$ -
New Portable A/C	Each	-	-	-	-	$ -	0.0%	9.00	$ -		Each	-	-	-	-	$ -	0.0%	9.00	$ -
High Efficiency Furnace	Each	18	311	0.1	562	$ 80,824	24.8%	20.00	$ 13,710.13		Each	22	118	0.1	719	$ 104,309	29.4%	20.00	$ 16,827.56
Diagnostic Duct Sealing	Each	35	885	2.5	118	$ 7,594	2.3%	25.00	$ 5,689.72		Each	27	1,487	1.1	185	$ 6,436	1.8%	25.00	$ 9,210.21
Duct Replacement	Each	22	1,447	0.0	77	$ 17,308	5.3%	25.00	$ 6,273.50		Each	11	1,514	0.0	117	$ 15,767	4.4%	25.00	$ 7,509.77
Duct Sealing with Equipment Upgrade	Each	4	27	0.7	11	$ 487	0.1%	20.00	$ 330.86		Each	-	-	-	-	$ -	0.0%	20.00	$ -
Ducted Heat Pump	Each	-	-	-	-	$ -	0.0%	15.00	$ -		Each	1	1,483	(0.0)	-	$ 3,834	1.1%	15.00	$ 3,160.54
Ducted Heat Pump - Fuel Substitution	Each	-	-	-	-	$ -	0.0%	15.00	$ -		Each	-	-	-	-	$ -	0.0%	15.00	$ -
Ductless Heat Pump	Each	-	-	-	-	$ -	0.0%	15.00	$ -		Each	-	-	-	-	$ -	0.0%	15.00	$ -
Ductless Heat Pump - Fuel Substitution	Each	-	-	-	-	$ -	0.0%	15.00	$ -		Each	-	-	-	-	$ -	0.0%	15.00	$ -
Smart Thermostat	Each	7	(78)	0.3	30	$ 1,577	0.5%	11.00	$ 320.63		Each	9	(360)	0.4	289	$ 2,036	0.6%	11.00	$ 3,754.46
Whole House Fan	Each	-	-	-	-	$ -	0.0%	9.00	$ -		Each	-	-	-	-	$ -	0.0%	9.00	$ -
Packaged HVAC	Each	1	1,046	-	-	$ 14,751	4.5%	15.00	$ 2,230.14		Each	-	-	-	-	$ -	0.0%	15.00	$ -
Maintenance																				
Minor Home Repair	Home	2	-	-	-	$ 1,450	0.4%	9.00	$ -		Home	7	-	-	-	$ 4,405	1.2%	9.00	$ -
Lighting																				
A-Lamp LED	Each	147	1,270	0.0	(29)	$ 764	0.2%	16.00	$ 2,253.89		Each	67	579	0.0	(13)	$ 443	0.1%	16.00	$ 1,027.28
Reflector Lamp LED	Each	5	51	0.0	(1)	$ 34	0.0%	16.00	$ 90.95		Each	-	-	-	-	$ -	0.0%	16.00	$ -
Miscellaneous																				
Cold Storage	Each	-	-	-	-	$ -	0.0%	10.00	$ -		Each	-	-	-	-	$ -	0.0%	10.00	$ -
New Air Purifier	Each	-	-	-	-	$ -	0.0%	9.00	$ -		Each	-	-	-	-	$ -	0.0%	9.00	$ -
Customer Enrollment[6]																				
ESA Outreach & Assessment	Home	31				$ 8,120	2.5%	-	$ -		Home	25				$ 6,548	1.8%	-	$ -
ESA In-Home Energy Education	Home	31				$ -	0.0%	-	$ -		Home	25					0.0%	-	$ -
Total Savings/Expenditures		**396**	**23,968**	**23**	**1,915**	**$ 326,179**	**100%**		**$ 97,225**			**275**	**25,624**	**25**	**2,881**	**$ 355,340**	**100%**		**$ 122,447**
Total Households Weatherized		**31**										**25**							

[1] "Completed and Expensed Installation" project savings and expenses will be reported when projects have been fully closed (i.e. inspected, issues resolved, permits closed as applicable) and reported by Pilot Implementer to PG&E. All measures and savings from a project will be reported as either Pilot Plus or Pilot Deep. Savings from a single project will not span both tables.
[2] The measure list for PG&E Pilot Plus and Deep is unique to the pilot and differs from Main ESA.
[3] Energy savings are reported based on best available information at the time. Pre- and post-installation savings are derived from energy modeling software. The energy modeling software estimates savings within +/- 10% certainty. PG&E intends to report the lower value in this range as interim savings until meter-based savings estimates are reportable (typically 12 months post installation).
[4] Final, disaggregated costs for measure installations will be reported in Table 2C once projects are fully completed and billed to PG&E by the Pilot Implementer.
[5] PG&E Pilot Plus and Deep utilize a different set of EUL due to the difference in measure mix between the Pilot and Main ESA. Additionally, the Pilot is calculating pre-and post-installation savings using energy modeling software, which the Pilot Implementer programs with specific EUL assumptions.
[6] In the PG&E Pilot Plus and Deep delivery model, the home assessment, enrollment, and customer energy education occur at the same visit. Cost tracking between "ESA Outreach & Assessment" and "ESA In-Home Energy Education" cannot be precisely tracked. Rather, the full cost of the visit will be tracked as ESA Outreach & Assessment.

Pilot Plus Households Treated	Total	
- Single Family Households Treated	Home	31
- Multi-family Households Treated	Home	-
- Mobile Homes Treated	Home	-
Total Number of Households Treated	**Home**	**31**
# Eligible Households to be Treated for PY [7]	Home	N/A
% of Households Treated	%	N/A
- Master-Meter Households Treated	Home	-

[7] D.21-06-015 did not specify annual home treatment or savings targets for Pilot Plus/Deep.

Pilot Deep Households Treated	Total	
- Single Family Households Treated	Home	25
- Multi-family Households Treated	Home	-
- Mobile Homes Treated	Home	-
Total Number of Households Treated	**Home**	**25**
# Eligible Households to be Treated for PY [4]	Home	N/A
% of Households Treated	%	N/A
- Master-Meter Households Treated	Home	-

ESA Program - Pilot Plus and Pilot Deep	Year to Date Expenses [8]			
	Electric	Gas	Total	
Administration [9]	$ 278,388	$ 246,872	$ 525,261	
Direct Implementation (Non-Incentive) [10]	$ 914,869	$ 811,299	$ 1,726,168	
Direct Implementation [11]	$ 993,468	$ 881,000	$ 1,874,468	*<<Includes measures costs*
TOTAL Pilot Plus and Pilot Deep COSTS	**$ 2,186,725**	**$ 1,939,171**	**$ 4,125,896**	

[8] Total ESA Pilot Plus and Pilot Deep YTD expenses may contain a combination of expenses and accrued expenses as reported in ESA Table 1A.
[9] Administration includes expenses from the following categories: General Administration, Regulatory Compliance, Training, Inspections, Marketing and Outreach, and Evaluation.
[10] Direct Implementation (Non-Incentive) includes expenses for Implementer Administration and Marketing.
[11] Direct Implementation includes expenses for measures delivery.

ESA Table 2D - Building Electrification Expenses and Energy Savings by Measures Installed (SCE Only)
Pacific Gas and Electric Company
Program Year 2023 Annual Report

	A	B	C	D	E	F	G	H	I	J
5	Measures	Units	ESA Program - Building Electrification Retrofit Pilot [1]							
6			2023 Completed & Expensed Installation							
7			Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses ($)	% of Expenditure	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings
8	**Appliances**									
9	Electric Dryer	Each	-	-	-	-	$ -	-	-	-
10	Heat Pump Dryer	Each	-	-	-	-	$ -	-	-	-
11	Cooktop/Range	Each	-	-	-	-	$ -	-	-	-
12	**Domestic Hot Water**									
13	Heat Pump Water Heater	Each	-	-	-	-	$ -	-	-	-
14	**Enclosure**									
15	Attic Insulation	Home	-	-	-	-	$ -	-	-	-
16	**HVAC**									
17	Heat Pump HVAC	Each	-	-	-	-	$ -	-	-	-
18	Duct Seal	Each	-	-	-	-	$ -	-	-	-
19	Smart Thermostat	Each	-	-	-	-	$ -	-	-	-
20	**Miscellaneous** [2]									
21	Minor Home Repair	Home	-	-	-	-	$ -	-	-	-
22	Carbon Monoxide/Smoke Alarm	Each	-	-	-	-	$ -	-	-	-
23	Electric Panel	Each	-	-	-	-	$ -	-	-	-
24	Electric Sub-Panel	Each	-	-	-	-	$ -	-	-	-
25	Electrical Circuit Run	Each	-	-	-	-	$ -	-	-	-
26	Induction Cookware	Home	-	-	-	-	$ -	-	-	-
27	**Customer Enrollment**									
28	Energy Assessment	Home	-	-	-	-	$ -	-	-	-
29	**Total Savings/Expenditures**		-	-	-	-	$ -	-	-	-
30										
31	**Households Treated**		**Total**							
32	Single Family Households Treated	Home	-							
33	Estimated Avg. Annual Bill SavingsTreated [3]	Home	-							
34										
35		Year to Date Expenses								
36	**ESA Program - Building Electrification**	Electric	Gas	Total						
37	**Administration**	-	-	$ -						
38	**Direct Implementation (Non-Incentive)**	-	-	$ -						
39	**Direct Implementation**	-	-	$ -	*<<Includes measures costs*					
40										
41	**TOTAL Building Electrification COSTS**	$ -	$ -	$ -						
42										
43	[1] The costs for the following measures are included in the overall expenditures of the BE Pilot: additional line set for ductless mini-splits and building permits.									
44	[2] These measures do not have any savings associated and may be required to complete the installation to electrify the residential end-uses of participating households.									
45	[3] Estimated average annual bill savings will be calculated prior to participation and must not increase total energy costs.									

ESA Table 2E - Clean Energy Homes Expenses and Energy Savings by Measures Installed (SCE Only)
Pacific Gas and Electric Company
Program Year 2023 Annual Report

	A	B	C	D	E	F	G	H
5			ESA Program - Clean Energy Homes New Construction Pilot					
6			2023 Completed & Expensed Installation					
7	Measures	Units	Quantity	[2]Avoided (CO_2e) emissions	Incentives Paid ($)	% of Expenditure	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings
8	**Education and Outreach**							
9	Direct Outreach (Developers and Owners)	Each	-	N/A	$ -	0.0%	-	-
10	Educational Webinars	Each	-	N/A	$ -	0.0%	-	-
11	**Technical Design Assistance (Reserved)**							
12	Single-Family Homes	Each	-	-	$ -	0.0%	-	-
13	Multifamily Properties	Each	-	-	$ -	0.0%	-	-
14	• Buildings	Each	-	-	$ -	0.0%	-	-
15	• No. of Dwelling Units	Each	-	-	$ -	0.0%	-	-
16	**Technical Design Assistance (In Process)**							
17	Single-Family Homes	Home	-	-	$ -	0.0%	-	-
18	Multifamily Properties	Each	-	-	$ -	0.0%	-	-
19	• Buildings	Each	-	-	$ -	0.0%	-	-
20	• No. of Dwelling Units	Each	-	-	$ -	0.0%	-	-
21	**Technical Design Assistance (Completed)**							
22	Single-Family Homes	Each	-	-	$ -	0.0%	-	-
23	Multifamily Properties	Each	-	-	$ -	0.0%	-	-
24	• Buildings	Each	-	-	$ -	0.0%	-	-
25	**No. of Dwelling Units**							
26	**Total Savings/Expenditures**		**-**	**-**	**$ -**	**0.0%**	**-**	**-**
27							-	-

28	**Households Treated**		**Total**
29	- Single Family Households Treated	Home	-
30	- Multifamily Dwelling Units Treated	Home	-
31	**Total Number of Households Treated**	**Home**	**-**

34		Year to Date Expenses			
35	ESA Program - Clean Energy Homes	Electric	Gas	Total	
36	**Administration**	$ -	$ -	$ -	
37	**Direct Implementation (Non-Incentive)**	$ -	$ -	$ -	
38	**Direct Implementation**	$ -	$ -	$ -	*<<Includes measures costs*
39					
40	**TOTAL Clean Energy Homes COSTS**	$ -	$ -	$ -	

41

42 [1] CEH will not track installations since it is a Design Assistance and Tenant Education Incentive Program.

43 [2] Savings for HVAC measures vary by CZ and is averaged in these tables

ESA Table 2F - CSD Leveraging Expenses and Energy Savings by Measures Installed
Pacific Gas and Electric Company
Program Year 2023 Annual Report

	A	B	C	D	E	F	G	H	I	J	K
5			ESA Program - CSD Leveraging								
6			2023 Completed & Expensed Installation								
7	Measures	Units	Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses ($)	% of Expenditure	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings	
8	**Appliances**										
9	High Efficiency Clothes Washer	Each	-	-	-	-	$ -	0.0%	-	-	
10	Refrigerators	Each	-	-	-	-	$ -	0.0%	-	-	
11	Microwaves	Each	-	-	-	-	$ -	0.0%	-	-	
12	Freezer	Each	-	-	-	-	$ -	0.0%	-	-	
13	**Domestic Hot Water**										
14	Water Heater Blanket	Home	-	-	-	-	$ -	0.0%	-	-	
15	Low Flow Shower Head	Home	-	-	-	-	$ -	0.0%	-	-	
16	Water Heater Pipe Insulation	Home	-	-	-	-	$ -	0.0%	-	-	
17	Faucet Aerator	Home	-	-	-	-	$ -	0.0%	-	-	
18	Water Heater Repair/Replacement	Each	-	-	-	-	$ -	0.0%	-	-	
19	Thermostatic Shower Valve	Each	-	-	-	-	$ -	0.0%	-	-	
20	Combined Showerhead/TSV	Each	-	-	-	-	$ -	0.0%	-	-	
21	Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%	-	-	
22	Tub Diverter/ Tub Spout	Each	-	-	-	-	$ -	0.0%	-	-	
23	Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%	-	-	
24	**Enclosure**										
25	Air Sealing / Envelope	Home	-	-	-	-	$ -	0.0%	-	-	
26	Caulking	Home	-	-	-	-	$ -	0.0%	-	-	
27	Attic Insulation	Home	-	-	-	-	$ -	0.0%	-	-	
28	**HVAC**										
29	FAU Standing Pilot Conversion	Each	-	-	-	-	$ -	0.0%	-	-	
30	Furnace Repair/Replacement	Each	-	-	-	-	$ -	0.0%	-	-	
31	Room A/C Replacement	Each	-	-	-	-	$ -	0.0%	-	-	
32	Central A/C replacement	Each	-	-	-	-	$ -	0.0%	-	-	
33	Heat Pump Replacement	Each	-	-	-	-	$ -	0.0%	-	-	
34	Evaporative Cooler (Replacement)	Each	-	-	-	-	$ -	0.0%	-	-	
35	Evaporative Cooler (Installation)	Each	-	-	-	-	$ -	0.0%	-	-	
36	Duct Testing and Sealing	Home	-	-	-	-	$ -	0.0%	-	-	
37	Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%	-	-	
38	Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%	-	-	
39	High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	0.0%	-	-	
40	A/C Time Delay	Home	-	-	-	-	$ -	0.0%	-	-	
41	**Maintenance**										
42	Furnace Clean and Tune	Home	-	-	-	-	$ -	0.0%	-	-	
43	Central A/C Tune up	Home	-	-	-	-	$ -	0.0%	-	-	
44	**Lighting**										
45	Compact Fluorescent Lights (CFL)	Each	-	-	-	-	$ -	0.0%	-	-	
46	Interior Hard wired CFL fixtures	Each	-	-	-	-	$ -	0.0%	-	-	
47	Exterior Hard wired CFL fixtures	Each	-	-	-	-	$ -	0.0%	-	-	
48	Torchiere	Each	-	-	-	-	$ -	0.0%	-	-	
49	Occupancy Sensor	Each	-	-	-	-	$ -	0.0%	-	-	
50	LED Night Lights	Each	-	-	-	-	$ -	0.0%	-	-	
51	LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	$ -	0.0%	-	-	
52	LED Reflector Bulb	Each	-	-	-	-	$ -	0.0%	-	-	
53	LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	$ -	0.0%	-	-	
54	LED A-Lamps	Each	-	-	-	-	$ -	0.0%	-	-	
55	**Miscellaneous**										
56	Pool Pumps	Each	-	-	-	-	$ -	0.0%	-	-	
57	Smart Power Strips - Tier 1	Each	-	-	-	-	$ -	0.0%	-	-	
58	Smart Power Strips - Tier 2	Each	-	-	-	-	$ -	0.0%	-	-	
59	**Pilots**										
60	-	-	-	-	-	-	-	-	-	-	
61	**Customer Enrollment**										
62	Outreach & Assessment	Home	-				$ -	0.0%			
63	In-Home Education	Home	-				$ -	0.0%			
64											
65	**Total Savings/Expenditures**		-	-	-	-	$ -	0.0%	-	-	
66											
67	**Total Households Weatherized**		-	-	-	-	-	-	-	-	
68											
69											
70	**CSD MF Buildings Treated**			**Total**							
71	Multifamily			0							
72											
73	**ESA Program - CSD Leveraging**			**Electric**	**Gas**	**Total**					
74	**Administration** [1]			$ 324	$ 378	$ 702					
75	**Direct Implementation (Non-Incentive)** [2]			$ -	$ -	$ -					
76	**Direct Implementation** [3]			$ -	$ -	$ -	*<<Includes measures costs*				
77											
78	**TOTAL CSD Leveraging COSTS**			$ 324	$ 378	$ 702					
79	[1] Administration includes administration labor expenses.										
80	[2] Direct Implementation (Non-Incentive) includes Implementer expenses.										
81	[3] Direct Implementation includes expenses for installation of measures.										

	A	B	C	D	E	F	G	H	I
1	**ESA Table 3 - Program Cost Effectiveness**								
2	**Pacific Gas and Electric Company**								
3	**Program Year 2023 Annual Report**								
4									
5	**Program**	**Ratio of Benefits Over Costs**					**Net Benefits $**		
6		**ESACET [2]**	**Resource Test**	**TRC**	**PAC**	**RIM**	**ESACET**	**Resource Test**	**TRC**
7	**ESA In-Unit (SF, MH, MF-In-Unit)**	0.82	0.64	0.44	0.44	0.29	(21.06)	(29.23)	(64.45)
8	**ESA MF CAM**	-	-	-	-	-	-	-	-
9	**ESA MFWB (MF In-Unit, MF CAM, MFWB)**	0.23	1.38	1.12	1.12	1.11	(6.08)	0.50	(6.97)
10	**ESA Pilot Plus and Pilot Deep [1]**	0.07	0.43	0.05	0.05	0.04	(3.82)	(0.36)	(3.90)
11	**Building Electrification**	-	-	-	-	-	-	-	-
12	**Clean Energy Homes**	-	-	-	-	-	-	-	-
13	[1] Pilot Plus/Deep cost-effectiveness calculations skew low in part because costs include accruals and actual expense for 131 completed installations, whereas savings only includes closed projects.								
14	[2] PG&E used the CET 2024 Avoided Cost Calculator, as required by D.16-06-007 for cost-effectiveness analysis.								
15									
16	**Notes:**								
17	*All program measures, including resource and non-resource measures, are represented in the ESACET. Only measures considered resource measures are represented in the Resource Test. Resource measures, as defined in D.21-06-015, include any measure with a unit savings of less than one kWh or one therm.								
18	*The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs.								
19	*The Resource Test includes energy benefits and program measure and installation costs.								
20	*Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC (renamed the Resource Test).								
21	*MFWB enrollment opened June 2023.								

ESA Table 4 - Detail by Housing Type and Source [1]
Pacific Gas and Electric Company
Program Year 2023 Annual Report

	A	B	C	D	E	F	G
6			2023 Energy Savings [2]				
7	Customer	Housing Type	# Homes /Properties Treated	(mWh)	MW	(mTherm)	2023 Expenses
8	**Gas and Electric Customers**						
9	**Owners - Total**		**38,038**	**47.70**	**4.25**	**4.92**	**$ 41,512,350**
10		**Single Family**	32,774	46.66	3.74	4.84	$ 37,607,079
11		**Multi Family**	101	0.01	0.00	0.00	$ 67,055
12		**Mobile Homes**	5,163	1.02	0.50	0.07	$ 3,838,216
13	**Renters - Total**		**17,010**	**10.60**	**0.91**	**0.89**	**$ 11,406,079**
14		**Single Family**	13,912	10.34	0.83	0.87	$ 10,169,801
15		**Multi Family**	2,951	0.23	0.07	0.01	$ 1,122,980
16		**Mobile Homes**	147	0.03	0.01	0.00	$ 113,298
17	**Electric Customers (only)**						
18	**Owners - Total**		**4,414**	**14.42**	**0.96**	**(0.01)**	**$ 16,853,974**
19		**Single Family**	3,910	13.26	0.88	(0.01)	$ 15,253,564
20		**Multi Family**	36	0.04	0.00	(0.00)	$ 66,775
21		**Mobile Homes**	468	1.12	0.08	(0.00)	$ 1,533,635
22	**Renters - Total**		**1,614**	**5.09**	**0.41**	**(0.00)**	**$ 6,899,863**
23		**Single Family**	1,184	4.38	0.34	(0.00)	$ 5,591,939
24		**Multi Family**	356	0.65	0.07	(0.00)	$ 1,226,802
25		**Mobile Homes**	74	0.06	0.00	(0.00)	$ 81,122
26	**Gas Customers (only)**						
27	**Owners - Total**		**3,553**	**0.37**	**0.20**	**0.19**	**$ 14,782,945**
28		**Single Family**	3,102	0.33	0.18	0.17	$ 13,617,726
29		**Multi Family**	5	0.00	0.00	0.00	$ 68,261
30		**Mobile Homes**	446	0.04	0.02	0.03	$ 1,096,957
31	**Renters - Total**		**945**	**0.13**	**0.06**	**0.09**	**$ 2,302,443**
32		**Single Family**	848	0.11	0.06	0.07	$ 2,076,851
33		**Multi Family**	78	0.01	0.00	0.02	$ 201,244
34		**Mobile Homes**	19	0.00	0.00	0.00	$ 24,348
35	**Gas and Electric Total - ESA MFWB**						
36	ESA Multifamily In-Unit [3]	-	3,468	5.00	0.00	0.36	$ 1,463,412
37	ESA Multifamily Common Area Measures [4]	-	-	-	-	-	-
38	ESA Multifamily Whole Building [5]	-	-	-	-	-	-
39	**Totals:**		**69,042**	**83.30**	**6.79**	**6.44**	**$ 95,221,066**

40 [1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging. Pilot Plus/Deep estimated energy savings are included in this table, but do not count toward PG&E's ESA Program energy savings goal in D.21-06-015 Table 5.

41 [2] Savings estimates are sourced from the most recent ESA Impact Evaluation; measures not included in the Impact Evaluation utilize values from workpapers.

42 [3] MFWB enrollment opened June 2023, in-unit energy savings from households enrolled June-Dec are included in MFWB; and in-units from enrollments in Jan-May are included in ESA Main reported in the above table lines 9-33

43 [4] MF CAM totals are included in Table 2A MF CAM; there were no MF CAM treatments in 2023.

44 [5] There were no MFWB properties completed in 2023; only in-unit treatments from enrollments June-Dec. 2023.

45

46–48	Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible Households Treated by Both Utilities in Shared Service
49	**2023**	SCE	5,523	4
50	**2023**	SDG&E	0	0
51	**2023**	SoCalGas	111,095	2,315

ESA Table 5 - Direct Purchases & Installation Contractors [1]
Pacific Gas and Electric Company
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Contractor	County	Contractor Type (Check one or more if applicable)				2023 Annual Expenditures
		Private	CBO	WMDVBE	LIHEAP	
Implementer 1						
	Fresno	X				$ 4,735.04
	San Luis Obispo, Santa Barbara	X		X		$ 621,976.28
	Butte, Colusa, El Dorado, Glenn, Nevada, Placer, Sacramento, San Mateo, Santa Clara, Solano, Sonoma, Sutter, Tehama, Yolo, Yuba	X				$ 470,509.80
	Fresno, Madera, Kings, Tulare, Kern	X		X		$ 47,104.77
	Santa Clara, San Mateo, Solano, Sonoma	X				$ 91,980.62
	Santa Clara, Santa Cruz	X				$ 2,894,793.33
	Merced, Madera, Tuolumne, Mariposa, Fresno	X				$ 14,045.85
	Santa Clara, San Mateo, Solano, Sonoma		X			$ 219,697.15
	Fresno, Madera, Kings, Tulare	X				$ 22,652.66
	Sacramento, Solano, Yolo		X	X		$ 2,059,570.94
	Kern, Kings, Tulare, Fresno, Madera, Merced, Santa Clara, Alameda, Contra Costa, San Francisco, San Mateo			X		$ 1,269,060.39
	Fresno	X				$ 76.15
	Sacramento	X				$ 323,948.90
	San Mateo		X			$ 4,994.09
	Merced, Stanislaus and San Joaquin	X				$ 1,648,611.75
	Santa Clara	X		X		$ 872,501.84
	Butte, Colusa, El Dorado, Glenn, Humboldt, Lake, Lassen, Mendocino, Monterey, San Benito, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Sierra, Siskiyou, Solano, Sonoma, Sutter, Tehama, Trinity	X				$ 1,008,536.23
	Kern	X		X		$ 6,644.97
	Tulare	X				$ 271.58
	Solano, Sonoma	X				$ 2,151,755.81
	Monterey	X				$ 7,152.43
	Kern, Kings and Madera County	X		X		$ 56,070.66
	Contra Costa, Napa	X				$ (202.06)
	Butte, Colusa, El Dorado, Glenn, Huboldt, Mendocino, Placer, Plumas, Shasta, Solano, Sonoma, Sutter, Tehama, Yolo, Yuba	X				$ 4,402,926.58
	Shatsa, Tehama		X			$ 416,270.40
	Santa Clara		X	X		$ 5.75
	Sacramento, Nevada, Placer, El Dorado, Santa Cruz, Monterey, San Benito	X				$ 2,376,408.20
	Fresno, Madera, Merced, San Luis Obispo, San Joaquin & Stanislaus	X				$ 588,167.44
	Sacramento, Solano, Yolo	X				$ 4,466,167.15
	San Luis Obispo, Santa Barbara, Santa Clara, Santa Cruz, Monterey, San Mateo, San Benito, Humboldt, Butte, Sacramento, Solano, Yolo, Sonoma, Colusa, Glenn, Lake, Nevada, Placer, Shasta, Sutter, Tehama, Yuba, El Dorado	X				$ 3,131,469.34
	San Luis Obispo, Santa Barbara, Santa Cruz, Monterey	X				$ 1,943,342.62
	San Luis Obispo, Santa Barbara, Santa Clara, Santa Cruz, Monterey, San Mateo, San Benito, Humboldt, Butte, Sacramento, Solano, Yolo, Sonoma, Colusa, Glenn, Lake, Nevada, Placer, Shasta, Sutter, Tehama, Yuba, El Dorado	X				$ 674,144.51
	Kern, Kings, Tulare, Fresno, Madera	X				$ 1,592.52
Implementer 1 Contractor Expenditures						**$ 31,796,983.69**

Contractor	County	(Check one or more if applicable)				2023 Annual Expenditures
		Private	CBO	WMDVBE	LIHEAP	
Implementer 2						
1	Alameda, Contra Costa, Marin, Napa, San Francisco, Alpine, Amador, Calaveras, Fresno, Kern, Kings, Madera, Mariposa, Merced, San Bernardino, San Joaquin, Stanislaus, Tulare, Tuolumne	X				$ 187,233.20
2	Fresno, Madera, Kings, Tulare, Kern	X				$ 7,225,660.33
3	San Francisco, San Mateo, Santa Clara, Alameda, Contra Costa, San Joaquin, Stanislaus, Merced, Solano	X		X		$ 3,343,280.23
4	Santa Clara	X				$ 1,714,755.24
5	Merced, Madera, Tuolumne, Mariposa, Fresno	X				$ 4,951,903.72
6	Fresno, Madera, Kings, Tulare	X		X		$ 4,340,411.63
7	Alameda, Contra Costa, Napa, Yolo, Solano, Sacramento, San Joaquin		X			$ 5,344,956.41
8	Kern, Kings, Tulare, Fresno, Madera, Merced, Santa Clara, Alameda, Contra Costa, San Francisco, San Mateo	X		X		$ 218,883.51
9	San Juaquin, Stanislaus, Contra Costa, Merced, Madera, Fresno, Kings, Tulare, Kern,	X				$ 102,758.07
10	Merced, Stanislaus and San Joaquin	x		X		$ 2,664,338.41
11	Kern, Fresno, Calavaras, Kings, Madera, Mariposa, Merced, San Joaquin, Tulare, Tulare, Tuolumne, Stanislaus	X		X		$ 9,731,577.10
12	Kings, Tulare, Riverside, San Bernardino, Imperial	X				$ 254,476.44
13	Kern County	X		X		$ 1,955,694.01
14	Napa, San Francisco, Contra Costa, Alameda, Sonoma, Solano, Marin	X				$ 14,445,174.30
15	Kern, Kings and Madera County	X		X		$ 2,222,030.61
16	Contra Costa, Napa	X				$ 1,269,375.43
17	Butte, Colusa, El Dorado, Glenn, Huboldt, Mendocino, Placer, Plumas, Shasta, Solano, Sonoma, Sutter, Tehama, Yolo, Yuba	X				$ 58,459.63
18	Alpine, Amador, Calaveras, Kern, Contra Costa	X				$ 5,432,666.02
19	Fresno, Madera, Merced, San Luis Obispo, San Joaquin & Stanislaus	X				$ 240,641.57
20	Alameda, Contra Costa, San Francisco, Marin, San Joaquin, Stanislaus, Fresno, Merced	X				$ 2,884,943.64
21	Kern, Fresno, Calaveras, Kings, Madera, Mariposa, Merced, San Joaquin, Tulare, Tuolumne, Stanislaus	X				$ 7,950,882.29
22	Kern, Kings, Tulare, Fresno, Madera	X				$ 4,497,168.32
Implementer 1 Contractor Expenditures						**$ 81,037,270.11**
Total Contract Expenditure						**$ 112,834,253.80**

[1] Annual Expenditures reflect invoices for projects paid in 2023 including NGAT work. Table 1 and 1A costs include labor and materials, accruals and cost corrections for 2023.

Notes:
*Includes Direct Purchases & Installation Contractors for the ESA Main Program only.

ESA Table 6 - Installation Cost of Program Installation Contractors [1]
Pacific Gas and Electric Company
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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
6		Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2023 Program Total				
7			Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Installations	Costs	Cost/ Unit	Cost/ Household
8			Units	%	Units	%	$	%	Units	%	Units	%	$	%					
9	Dwellings	Each	134,352	5%		0%	$ 8,045,434	9%	2,690,501	95%		0%	$ 85,045,368	91%	2,824,853	65,518	$ 93,090,801	$ 32.95	$ 1,420.84
10	**Appliances**																		
11	High Efficiency Clothes Washer	Each	231	7%	230	7%	$ 224,339	7%	2,945	93%	2,942	93%	$ 2,860,075	93%	3,176	3,172	$ 3,084,413	$ 971	$ 972
12	Refrigerator	Each	712	6%	710	6%	$ 827,848	6%	11,857	94%	11,827	94%	$ 13,790,078	94%	12,569	12,537	$ 14,617,926	$ 1,163	$ 1,166
13	Microwave	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
14	Freezer	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
15	**Domestic Hot Water**																		
16	Other Domestic Hot Water	Home	10,298	6%	3,347	7%	$ 303,836	7%	157,723	94%	45,691	93%	$ 4,147,764	93%	168,021	49,038	$ 4,451,600	$ 26	$ 91
17	Water Heater Repair/Replacement	Home	570	5%	160	8%	$ 340,420	8%	10,256	95%	1,841	92%	$ 3,916,959	92%	10,826	2,001	$ 4,257,379	$ 393	$ 2,128
18	Water Heater Tank and Pipe Insulation	Home	462	5%	184	3%	$ 15,859	3%	9,022	95%	5,346	97%	$ 460,765	97%	9,484	5,530	$ 476,624	$ 50	$ 86
19	Heat Pump Water Heater	Each	23	20%	23	20%	$ 87,671	20%	93	80%	94	80%	$ 354,495	80%	116	117	$ 442,165	$ 3,812	$ 3,779
20	Tub Diverter/ Tub Spout	Each	2	0%	1	0%	$ 198	0%	932	100%	698	100%	$ 92,408	100%	934	699	$ 92,606	$ 99	$ 132
21	Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
22	Combined Showerhead/TSV	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
23	CAM - Central Boiler	Cap-kBTUh	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
24	CAM - Faucet Aerator	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
25	CAM - Pipe Insulation	Home	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
26	**Enclosure**																		
27	Air Sealing	Home	28,683	7%	5,042	11%	$ 2,796,599	11%	362,180	93%	41,068	89%	$ 22,778,804	89%	390,863	46,110	$ 25,575,403	$ 65	$ 555
28	Attic Insulation	Home	57,830	3%	64	5%	$ 117,304	5%	1,612,171	97%	1,324	95%	$ 2,426,721	95%	1,670,001	1,388	$ 2,544,025	$ 2	$ 1,833
29	**HVAC**																		
30	FAU Standing Pilot Conversion	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
31	Furnace Repair/Replacement	Each	190	10%	188	10%	$ 788,712	10%	1,665	90%	1,660	90%	$ 6,964,162	90%	1,855	1,848	$ 7,752,875	$ 4,179	$ 4,195
32	Room A/C Replacement	Each		0%					(3)	100%	-		$ -		(3)	-	$ -	$ -	
33	Central A/C Replacement	Each		0%		0%		0%	32	100%	32	100%	$ 136,234	100%	32	32	$ 136,234	$ 4,257	$ 4,257
34	Heat Pump Replacement	Each		-		-		-	1	1	1	1	$ 4,799	1	1	1	$ 4,799	$ 4,799	$ 4,799
35	Evaporative Coolers (Replacement)	Each		0%		0%			(1)	100%	1	100%	$ -		(1)	1	$ -	$ -	$ -
36	Evaporative Coolers (Installation)	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
37	Duct Test and Seal	Home	9	4%	8	4%	$ 5,572	4%	204	96%	205	96%	$ 142,777	96%	213	213	$ 148,349	$ 696	$ 696
38	Energy Efficient Fan Control	Home	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
39	Prescriptive Duct Sealing	Home	4,091	12%	3,005	9%	$ 1,941,662	12%	29,679	88%	29,883	91%	$ 14,086,188	88%	33,770	32,888	$ 16,027,851	$ 475	$ 487
40	Smart Thermostat	Home	693	4%	658	4%	$ 158,267	4%	15,145	96%	14,336	96%	$ 3,458,800	96%	15,838	14,994	$ 3,617,066	$ 228	$ 241
41	CAM - HEAT Pump Split System	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
42	High Efficiency Forced Air Unit (HE FAU)	Home	3	6%	3	6%	$ 15,733	6%	49	94%	49	94%	$ 256,974	1	52	52	$ 272,707	$ 5,244	$ 5,244
43	A/C Time Delay	Home		0%		0%			(5)	100%	2	100%	$ -		(5)	2	$ -	$ -	$ -
44	Portable A/C	Each	3	13%	3	12%	$ 1,552	13%	21	88%	23	88%	$ 10,861	88%	24	26	$ 12,413	$ 517	$ 477
45	Wholehouse Fan	Each		0%		0%		0%	9	100%	9	100%	$ 12,350	100%	9	9	$ 12,350	$ 1,372	$ 1,372
46	CAM - Programmable Thermostat	Each	-	-	-		$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
47	**Maintenance**																		
48	Furnace Clean and Tune	Home	-	-	-	0%	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
49	Central A/C Tune-up	Home	24	0%	23	0%	$ 7,038	0%	9,427	100%	9,344	100%	$ 2,859,343	100%	9,451	9,367	$ 2,866,381	$ 303	$ 306
50	Evaporative Cooler Maintenance	Home	-	-	-	0%	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
51	**Lighting**																		
52	Exterior Hard wired LED fixtures	Each	47	3%	29	4%	$ 2,712	3%	1,470	97%	719	96%	$ 84,838	97%	1,517	748	$ 87,550	$ 58	$ 117
53	Interior Hard wired LED fixtures	Each	(4)	-11%	6	8%	$ (336)	-11%	40	111%	68	92%	$ 3,360	111%	36	74	$ 3,024	$ 84	$ 41
54	Occupancy Sensor	Each		0%		0%			(6)	100%	1	100%	$ -		(6)	1	$ -	$ -	$ -
55	LED Torchiere	Each	(11)	20%	7	14%	$ 57	20%	(44)	80%	42	86%	$ 230	80%	(55)	49	$ 287	$ (5)	$ 6
56	LED A-Lamps	Each	22,873	6%	2,919	6%	$ 187,947	6%	392,635	94%	44,476	94%	$ 3,226,276	94%	415,508	47,395	$ 3,414,223	$ 8	$ 72
57	LED R/BR Lamps	Each	5,478	10%	1,119	11%	$ 45,189	10%	46,705	90%	8,873	89%	$ 385,280	90%	52,183	9,992	$ 430,469	$ 8	$ 43
58	CAM - Exterior LED Lighting	Fixture	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
59	CAM - Exterior LED Lighting - Pool	Lamp	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
60	Exterior LED Lighting - Spa	Each	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
61	CAM - Interior LED Fixture	Fixture	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
62	CAM - Interior LED Lighting	KiloLumen	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
63	CAM - Interior LED Screw-in	Lamp	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
64	CAM - Interior TLED Type A Lamps	Lamp	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
65	CAM - Interior TLED Type C Lamps	Lamp	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
66	CAM - Interior LED Exit Sign	Fixture	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
67	**Miscellaneous**																		
68	Smart Strip	Each	4	14%	2	7%	$ -		24	86%	25	93%	$ -		28	27	$ -	$ -	$ -
69	Smart Strip Tier II	Each	2,084	8%	1,087	7%	$ 159,915	8%	25,404	92%	13,696	93%	$ 1,949,372	92%	27,488	14,783	$ 2,109,288	$ 77	$ 143
70	Cold Storage	Each		0%		0%		0%	50	100%	50	100%	$ 15,845	100%	50	50	$ 15,845	$ 317	$ 317
71	Pool Pump	Each	2	1%	2	1%	$ 3,850	1%	249	99%	251	99%	$ 479,322	99%	251	253	$ 483,172	$ 1,925	$ 1,910
72	Air Purifier	Each	55	9%	55	9%	$ 13,489	9%	572	91%	572	91%	$ 140,287	91%	627	627	$ 153,776	$ 245	$ 245
73	**Ancillary Services**																		
74	Commissioning	Home	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
75	CAM - Audit	Home	-	-	-	-	$ -	-	-	-	-	-	$ -	-	-	-	$ -	$ -	$ -
76	**Customer Enrollment**																		
77	ESA In-Home Energy Education	Home	65,518																
78	ESA Outreach & Assessment	Home	65,518																

79 [1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit).Pilot Plus/Deep and MFWB are ommitted as those programs install different measure packages.

ESA Table 7 - Expenditures Recorded by Cost Element [1]
Pacific Gas and Electric Company
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	A	B	C	D	E
6	**ESA Program:**	**Labor [1]**	**Non-Labor [2]**	**Contractor [3]**	**Total**
7	**Energy Efficiency**				
8	**ESA Main Program (SF, MH, MF In-Unit)**				
9	Appliances	$ -	$ -	$ 17,890,848	$ 17,890,848
10	Domestic Hot Water	$ -	$ -	$ 9,164,854	$ 9,164,854
11	Enclosure	$ -	$ -	$ 26,991,292	$ 26,991,292
12	HVAC	$ -	$ -	$ 31,068,710	$ 31,068,710
13	Maintenance	$ -	$ -	$ -	$ -
14	Lighting	$ -	$ -	$ 3,999,592	$ 3,999,592
15	Miscellaneous	$ -	$ -	$ 2,583,036	$ 2,583,036
16	Customer Enrollment	$ -	$ -	$ 9,039,433	$ 9,039,433
17	In Home Education	$ -	$ -	$ 4,677,740	$ 4,677,740
18	Pilot	$ -	$ -	$ (229,688)	$ (229,688)
19	Implementation [4]	$ -	$ -	$ 4,826,987	$ 4,826,987
20	Safety - Unexpected overhead costs	$ -	$ -	$ (1,795)	$ (1,795)
21	**ESA Main TOTAL**	**$ -**	**$ -**	**$ 110,011,010**	**$ 110,011,010**
22	ESA Multifamily In-Unit	$ -	$ -	$ 2,435,923	$ 2,435,923
23	ESA Multifamily Common Area Measures	$ 963	$ -	$ 412,606	$ 413,569
24	ESA Multifamily Whole Building	$ -	$ -	$ 5,312,048	$ 5,312,048
25	CSD Leveraging	$ 702	$ -	$ -	$ 702
26	MCE Pilot	$ -	$ -	$ -	$ -
27	SPOC	$ -	$ -	$ 339,632	$ 339,632
28	**Multi-Family TOTAL**	**$ 1,665**	**$ -**	**$ 8,500,208**	**$ 8,501,873**
29					
30	Training Center	$ 125,840	$ -	$ 328,696	$ 454,536
31	Inspections	$ 1,568,736	$ 481	$ -	$ 1,569,217
32	Marketing and Outreach	$ 331,561	$ -	$ 1,891,290	$ 2,222,850
33	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -
34	Measurement and Evaluation Studies	$ -	$ -	$ (43,743)	$ (43,743)
35	Regulatory Compliance	$ 330,124	$ -	$ 56,850	$ 386,974
36	General Administration	$ 4,383,925	$ 246	$ 856,742	$ 5,240,913
37	CPUC Energy Division	$ -	$ -	$ 34,366	$ 34,366
38	**Administration TOTAL**	**$ 6,740,187**	**$ 727**	**$ 3,124,201**	**$ 9,865,114**
39					
40	Pilot Plus and Pilot Deep	$ 262,614	$ -	$ 3,863,283	$ 4,125,896
41	Building Electrification Retrofit Pilot (SCE Only)	$ -	$ -	$ -	$ -
42	Clean Energy Homes New Construction Pilot (SCE Only)	$ -	$ -	$ -	$ -
43	SASH and MASH Unspent Funds	$ -	$ -	$ -	$ -
44					
45	**TOTAL PROGRAM COSTS**	**$ 7,004,465**	**$ 727**	**$ 125,498,701**	**$ 132,503,894**

46 [1] Labor costs include any internal direct costs (administrative and/or implementation), burdened by overhead, that represents person hours.
47 [2] Non-Labor costs include all internal direct costs (administrative and/or implementation) not covered under labor.
48 [3] Contract costs include all outsourced costs (administrative and/or implementation). Contract costs do not need to be further broken out by labor/non-labor.
49 [4] This budget category includes the primary Implementer(s) administrative fee for ESA Main.

ESA Table 8 - Homes Unwilling / Unable to Participate
Pacific Gas and Electric Company
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	Reason Provided [1]						
County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
ALAMEDA	448	3,002	7	155	47	147	188
ALPINE	-	-	-	-	-	-	-
AMADOR	9	103	-	1	4	3	34
BUTTE	94	178	10	7	27	2	823
CALAVERAS	7	118	-	4	-	14	17
COLUSA	11	17	1	-	6	-	82
CONTRA COSTA	430	2,918	11	270	151	195	508
EL DORADO	25	204	-	15	8	4	159
FRESNO	113	6,850	55	89	66	331	313
GLENN	13	47	1	1	5	-	125
HUMBOLDT	26	79	4	2	14	8	169
KERN	363	4,783	5	72	14	363	530
KINGS	4	105	-	2	-	118	18
LAKE	6	12	-	-	2	-	380
LASSEN	-	1	-	-	-	-	7
MADERA	23	807	10	6	7	42	37
MARIN	6	113	2	8	4	3	7
MARIPOSA	-	47	-	3	-	-	1
MENDOCINO	5	6	-	-	1	-	183
MERCED	194	2,740	8	47	100	6	192
MONTEREY	62	1,666	1	61	18	68	239
NAPA	27	223	4	18	13	10	15
NEVADA	25	225	-	7	5	1	44
PLACER	35	290	-	258	18	4	366
PLUMAS	-	9	-	-	-	-	27
SACRAMENTO	726	1,989	1	356	54	27	496
SAN BENITO	7	153	-	2	-	2	13
SAN BERNARDINO	-	3	-	-	-	-	1
SAN FRANCISCO	16	649	1	30	5	36	30
SAN JOAQUIN	406	4,648	44	422	203	155	706
SAN LUIS OBISPO	9	421	-	18	14	-	143
SAN MATEO	12	528	2	3	12	21	295
SANTA BARBARA	-	320	-	10	1	-	220
SANTA CLARA	424	3,881	6	16	39	27	1,081
SANTA CRUZ	44	464	1	4	6	5	105
SHASTA	50	403	115	12	61	22	306
SIERRA	-	1	-	-	-	-	1
SISKIYOU	-	-	-	-	-	-	-
SOLANO	413	1,281	8	206	119	26	731
SONOMA	60	879	-	4	28	12	229
STANISLAUS	55	1,937	10	36	33	27	117
SUTTER	102	124	3	4	29	1	373
TEHAMA	19	252	89	11	16	9	128
TRINITY	-	-	-	-	-	-	4
TULARE	2	235	1	2	-	19	7
TUOLUMNE	2	151	-	3	-	1	11
YOLO	269	595	3	10	28	4	161
YUBA	61	162	2	2	21	3	292
Total	**4,603**	**43,619**	**405**	**2,177**	**1,179**	**1,716**	**9,914**

	Reason Provided - ESA Main						
County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
ALAMEDA	442	3,001	7	155	43	146	125
ALPINE	-	-	-	-	-	-	-
AMADOR	9	103	-	1	3	3	32
BUTTE	82	176	8	7	20	2	780
CALAVERAS	7	118	-	4	-	14	16
COLUSA	10	15	1	-	5	-	80
CONTRA COSTA	328	2,902	8	269	81	193	227
EL DORADO	25	204	-	15	5	4	151
FRESNO	111	6,850	55	88	65	331	270
GLENN	11	47	1	-	5	-	122
HUMBOLDT	26	79	4	2	14	8	166
KERN	363	4,783	5	72	14	363	488
KINGS	4	105	-	2	-	118	11
LAKE	6	12	-	-	2	-	374
LASSEN	-	1	-	-	-	-	7
MADERA	23	807	10	6	7	42	32
MARIN	6	113	2	8	4	3	5
MARIPOSA	-	47	-	3	-	-	1
MENDOCINO	5	6	-	-	1	-	182
MERCED	158	2,739	6	42	80	6	92
MONTEREY	62	1,666	1	61	18	68	231
NAPA	27	223	4	18	13	10	12
NEVADA	25	225	-	6	4	1	39
PLACER	34	289	-	258	17	4	338
PLUMAS	-	9	-	-	-	-	27
SACRAMENTO	726	1,989	1	356	54	27	471
SAN BENITO	7	153	-	2	-	2	13
SAN BERNARDINO	-	3	-	-	-	-	1
SAN FRANCISCO	16	649	1	30	5	36	26
SAN JOAQUIN	326	4,628	34	415	148	155	371
SAN LUIS OBISPO	9	421	-	18	14	-	143
SAN MATEO	12	528	2	3	12	21	292
SANTA BARBARA	-	320	-	10	1	-	220
SANTA CLARA	424	3,881	6	16	39	27	1,069
SANTA CRUZ	44	464	1	4	6	5	105
SHASTA	49	403	115	12	60	22	298
SIERRA	-	1	-	-	-	-	1
SISKIYOU	-	-	-	-	-	-	-
SOLANO	365	1,271	6	204	81	24	613
SONOMA	60	879	-	4	28	12	226
STANISLAUS	51	1,936	10	36	29	27	85
SUTTER	85	121	2	4	20	1	323
TEHAMA	17	252	89	11	15	9	118
TRINITY	-	-	-	-	-	-	4
TULARE	2	235	1	2	-	19	3
TUOLUMNE	2	151	-	3	-	1	11
YOLO	258	594	2	10	26	4	135
YUBA	51	160	2	2	15	3	258
Total	**4,268**	**43,559**	**384**	**2,159**	**954**	**1,711**	**8,594**

	Reason Provided - PP/PD						
County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
ALAMEDA	6	1	0	0	4	1	63
ALPINE	0	0	0	0	0	0	0
AMADOR	0	0	0	0	1	0	2
BUTTE	12	2	2	0	7	0	43
CALAVERAS	0	0	0	0	0	0	1
COLUSA	1	2	0	0	1	0	2
CONTRA COSTA	102	16	3	1	70	2	281
EL DORADO	0	0	0	0	3	0	8
FRESNO	2	0	0	1	1	0	43
GLENN	2	0	0	1	0	0	3
HUMBOLDT	0	0	0	0	0	0	3
KERN	0	0	0	0	0	0	42
KINGS	0	0	0	0	0	0	7
LAKE	0	0	0	0	0	0	6
LASSEN	0	0	0	0	0	0	0
MADERA	0	0	0	0	0	0	5
MARIN	0	0	0	0	0	0	2
MARIPOSA	0	0	0	0	0	0	0
MENDOCINO	0	0	0	0	0	0	1
MERCED	36	1	2	5	20	0	100
MONTEREY	0	0	0	0	0	0	8
NAPA	0	0	0	0	0	0	3
NEVADA	0	0	0	1	1	0	5
PLACER	1	1	0	0	1	0	28
PLUMAS	0	0	0	0	0	0	0
SACRAMENTO	0	0	0	0	0	0	25
SAN BENITO	0	0	0	0	0	0	0
SAN BERNARDINO	0	0	0	0	0	0	0
SAN FRANCISCO	0	0	0	0	0	0	4
SAN JOAQUIN	80	20	10	7	55	0	335
SAN LUIS OBISPO	0	0	0	0	0	0	0
SAN MATEO	0	0	0	0	0	0	3
SANTA BARBARA	0	0	0	0	0	0	0
SANTA CLARA	0	0	0	0	0	0	12
SANTA CRUZ	0	0	0	0	0	0	0
SHASTA	1	0	0	0	1	0	8
SIERRA	0	0	0	0	0	0	0
SISKIYOU	0	0	0	0	0	0	0
SOLANO	48	10	2	2	38	2	118
SONOMA	0	0	0	0	0	0	3
STANISLAUS	4	1	0	0	4	0	32
SUTTER	17	3	1	0	9	0	50
TEHAMA	2	0	0	0	1	0	10
TRINITY	0	0	0	0	0	0	0
TULARE	0	0	0	0	0	0	4
TUOLUMNE	0	0	0	0	0	0	0
YOLO	11	1	1	0	2	0	26
YUBA	10	2	0	0	6	0	34
Total	**335**	**60**	**21**	**18**	**225**	**5**	**1,320**

[1] Summary data includes ESA Main Program (SF, MH, MF-In-Unit) and Pilot Plus and Deep.
[2] ESA Pilot Plus and Pilot Deep tracks under "Other Infeasible/Ineligible" the customers unable to participate due to their homes or savings potential not meeting pilot criteria.

ESA Coordinated Treatment (SCE and SCG Only)

Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency [1]					
# of Households Received Measures from one Utility, but not other Utility or Partnering Agency	# of Customer Unwilling/Declined Program Measures	# of Customer Unavailable - Scheduling Conflicts	# of Hazardous Environment (unsafe/unclean)	# of Landlord Refused to Authorize Participation	# of Other Infeasible/ Ineligible
-	-	-	-	-	-
-	-	-	-	-	-
Total	-	-	-	-	-

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging, and Building Electrification.

ESA Table 9 - ESA Energy Rate Used for Bill Savings Calculations [1]
Pacific Gas and Electric Company
Program Year 2023 Annual Report

Residential Energy Rate Used for Bill Savings Calculations			Non-Residential Energy Rate Used for Bill Savings Calculations (MF In-Unit, MF CAM, MFWB)		
Year	$/kWh	$/Therm	Year	$/kWh	$/Therm
2023	0.1902	1.6941	2023	0.3718	2.3872
2024	0.3722	3.3149	2024	0.5457	3.5039
2025	0.5463	4.8656	2025	0.7121	4.5722
2026	0.7129	6.3491	2026	0.8712	5.5943
2027	0.8722	7.7685	2027	1.0235	6.5722
2028	1.0247	9.1263	2028	1.1692	7.5077
2029	1.1706	10.4255	2029	1.3086	8.4027
2030	1.3101	11.6683	2030	1.4420	9.2590
2031	1.4436	12.8574	2031	1.5696	10.0782
2032	1.5714	13.9950	2032	1.6916	10.8620
2033	1.6936	15.0834	2033	1.8084	11.6119
2034	1.8105	16.1247	2034	1.9201	12.3292
2035	1.9223	17.1209	2035	2.0270	13.0156
2036	2.0294	18.0739	2036	2.1293	13.6722
2037	2.1317	18.9858	2037	2.2271	14.3004
2038	2.2297	19.8581	2038	2.3207	14.9014
2039	2.3234	20.6927	2039	2.4103	15.4764
2040	2.4130	21.4912	2040	2.4959	16.0265
2041	2.4988	22.2551	2041	2.5779	16.5528
2042	2.5809	22.9859	2042	2.6563	17.0564
2043	2.6594	23.6851	2043	2.7313	17.5381
2044	2.7345	24.3541	2044	2.8031	17.9990
2045	2.8064	24.9941	2045	2.8718	18.4399
2046	2.8751	25.6063	2046	2.9375	18.8617

[1] This table shows the present value of the lifecycle average cost per kWh and therms paid by ESA participants for measures that persist into the respective year shown. Rates are escalated 3% annually, and discounted by PG&E WACC (Weighted Average Cost of Capital).
These values are used directly in PG&E bill savings calculation and do not represent forecast rates for individual years

ESA Table 10 - ESA Bill Savings Calculations by Program Year
Pacific Gas and Electric Company
Program Year 2023 Annual Report

ESA Table 10A
Bill Savings Calculations by Program Year (ESA Main - SF, MH, MF-In-Unit)

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2013	$ 142,181,389	$ 54,007,801	0.38	$ 437
2014	$ 145,940,449	$ 53,008,314	0.36	$ 429
2015	$ 136,775,345	$ 63,956,471	0.47	$ 636
2016	$ 105,094,305	$ 52,052,655	0.50	$ 700
2017	$ 122,778,059	$ 106,566,378	0.87	$ 1,224
2018	$ 122,576,966	$ 102,803,203	0.84	$ 1,207
2019	$ 168,368,608	$ 92,267,012	0.55	$ 865
2020	$ 133,404,957	$ 80,411,595	0.60	$ 930
2021	$ 155,136,501	$ 100,062,749	0.64	$ 970
2022	$ 123,161,951	$ 58,340,240	0.47	$ 863
2023	$ 119,876,124	$ 75,679,447	0.63	$ 1,155

ESA Table 10B
Bill Savings Calculations by Program Year (Pilot Plus and Pilot Deep) [1]

Program Year	Program Costs	Program Lifecycle Bill Savings[2]	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021	$ 33,308	N/A	N/A	N/A
2022	$ 907,761	N/A	N/A	N/A
2023	**$ 4,125,896**	**$ 219,672**	**0.05**	**$ 3,923**

[1] Data for program years prior to 2021 is not applicable as program wsa not authorized until D.21-06-015.

[2] Savings reflect completed projects only. Projects are reported as complete when projects have been fully closed (i.e. inspected, issues resolved, permits closed as applicable) and reported by Pilot Implementer to PG&E.

ESA Table 10C
Bill Savings Calculations by Program Year - MF CAM and MFWB [1]

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Property Average Lifecycle Bill Savings
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022	$ 6,309,903	$ 4,517,144	0.72	$ 70,009
2023	$ 8,006,313	$ 1,014,756	0.13	$ -

[1] Summary data includes only in-units treated by MFWB.No "Per Property Average Lifecycle Bill Savings" as MFWB and MFCAM did not treat any property in 2023, program lifecycle bill savings are based on in-unit savings.

Note:
*Clean Energy Homes is not applicable.

ESA Table 10D
Bill Savings Calculations by Program Year - Building Electrification (SCE Only)

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022				
2023	**-**	**-**	**-**	**-**

Note:
*Data for program years prior to 2022 is not applicable as program not authorized until D.21-06-015.

ESA Table 11 - ESA Fund Shifting
Pacific Gas and Electric Company
Program Year 2023 Annual Report

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
6											FUND SHIFT AMOUNT														
7		Budget [2]			Expenditures			(Budget - Expenditures = Variance)			Among Categories			Carry Forward from 2023			Committed from 2023								
8	Program Year 2022	Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures	Variance			(1) Shift of Current Year Authorized [1]			(2) Shift of Carry Forward [3]			(3) Shift of Committed			Total Shifted Gas/ Electric	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization
9								Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total						
10	**ESA Main Program**																								
11	Appliance	$ 11,050,371	$ -	**$ 11,050,371**	$ 17,890,848	$ -	**$ 17,890,848**	$ (6,840,477)	$ -	**$ (6,840,477)**	$ 6,840,477	$ -	**$ 6,840,477**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 6,840,477	3.0%	1. Current Year Authorized	1. 2023	1. Shift from electric to electric	1. D.21-06-015
12	Domestic Hot Water	$ 1,323,574	$ 6,553,824	**$ 7,877,398**	$ 340,771	$ 8,824,083	**$ 9,164,854**	$ 982,803	$ (2,270,259)	**$ (1,287,456)**	$ -	$ 2,270,259	**$ 2,270,259**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 2,270,259	1.0%	1. Current Year Authorized	1. 2023	1. Shift from gas to gas	1. D.21-06-015
13	Enclosure	$ 261,054	$ 25,844,250	**$ 26,105,304**	$ 269,913	$ 26,721,379	**$ 26,991,292**	$ (8,859)	$ (877,129)	**$ (885,988)**	$ 8,859	$ 877,129	**$ 885,988**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 885,988	0.4%	1. Current Year Authorized 2. Current Year Authorized	1. 2023 2. 2023	1. Shift from electric to electric. 2. Shift from gas to gas.	1. D.21-06-015 2. D.21-06-015
14	HVAC	$ 12,642,366	$ 7,937,839	**$ 20,580,205**	$ 13,665,786	$ 17,402,924	**$ 31,068,710**	$ (1,023,420)	$ (9,465,085)	**$ (10,488,504)**	$ 1,023,420	$ 9,465,085	**$ 10,488,504**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 10,488,504	4.6%	1. Current Year Authorized 2. Current Year Authorized 3. Current Year Authorized	1. 2023 2. 2023 3. 2023	1. Shift from electric to electric. 2. Shift from gas to gas. 3. Shift from electric to gas.	1. D.21-06-015 2. D.21-06-015 3. D.21-06-015
15	Maintenance	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	N/A	N/A	N/A	N/A
16	Lighting	$ 5,751,431	$ -	**$ 5,751,431**	$ 3,999,592	$ -	**$ 3,999,592**	$ 1,751,839	$ -	**$ 1,751,839**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	N/A	N/A	N/A	N/A
17	Miscellaneous	$ 12,931,454	$ -	**$ 12,931,454**	$ 2,583,036	$ -	**$ 2,583,036**	$ 10,348,418	$ -	**$ 10,348,418**	$ (10,348,418)	$ -	**$ (10,348,418)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (10,348,418)	-4.5%	1. Current Year Authorized 2. Current Year Authorized	1. 2023 2. 2023	1. Shift from electric to electric. 2. Shift from electric to gas.	1. D.21-06-015 2. D.21-06-015
18	Customer Enrollment	$ 9,313,285	$ 8,258,951	**$ 17,572,235**	$ 4,790,900	$ 4,248,534	**$ 9,039,433**	$ 4,522,385	$ 4,010,417	**$ 8,532,802**	$ (3,908,690)	$ (4,010,417)	**$ (7,919,107)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (7,919,107)	-3.4%	1. Current Year Authorized 2. Current Year Authorized	1. 2023 2. 2023	1. Shift from gas to gas. 2. Shift from electric to gas	1. D.21-06-015 2. D.21-06-015
19	In Home Education	$ 2,808,483	$ 2,490,542	**$ 5,299,025**	$ 2,479,202	$ 2,198,538	**$ 4,677,740**	$ 329,281	$ 292,004	**$ 621,285**	$ -	$ (292,004)	**$ (292,004)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (292,004)	-0.1%	1. Current Year Authorized	1. 2023	1. Shift from gas to gas	1. D.21-06-015
20	Pilot	$ 395,314	$ 350,562	**$ 745,876**	$ (121,734)	$ (107,953)	**$ (229,688)**	$ 517,048	$ 458,515	**$ 975,563**	$ -		**$ -**	$ 517,048	$ 458,515	**$ 975,563**	$ -	$ -	**$ -**	$ 975,563	0.4%	1.Carried Forward	1. 2023	1. Shift from 2023 to 2024	1. D.21-06-015
21	Implementation	$ 2,690,738	$ 2,386,126	**$ 5,076,864**	$ 2,558,303	$ 2,268,684	**$ 4,826,987**	$ 132,435	$ 117,443	**$ 249,878**	$ -	$ (117,443)	**$ (117,443)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (117,443)	-0.1%	1. Current Year Authorized	1. 2023	1. Shift from gas to gas	1. D.21-06-015
22	Safety - Unexpected overhead costs	$ -	$ -	**$ -**	$ (951)	$ (844)	**$ (1,795)**	$ 951	$ 844	**$ 1,795**	$ -	$ (844)	**$ (844)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (844)	0.0%	1. Current Year Authorized	1. 2023	1. Shift from gas to gas	1. D.21-06-015
23	**ESA Main TOTAL**	**$ 59,168,070**	**$ 53,822,094**	**$ 112,990,164**	**$ 48,455,665**	**$ 61,555,345**	**$ 110,011,010**	**$ 10,712,405**	**$ (7,733,251)**	**$ 2,979,154**	**$ (6,384,352)**	**$ 8,191,766**	**$ 1,807,414**	**$ 517,048**	**$ 458,515**	**$ 975,563**	**$ -**	**$ -**	**$ -**	**$ 2,782,977**	1.2%	-	-	-	-
24	ESA Multifamily In-Unit	$ 9,779,830	$ 8,672,679	**$ 18,452,509**	$ 843,082	$ 1,592,841	**$ 2,435,923**	$ 8,936,748	$ 7,079,838	**$ 16,016,586**	$ -	$ -	**$ -**	$ 8,936,748	$ 7,079,838	**$ 16,016,586**	$ -	$ -	**$ -**	$ 16,016,586	7.0%	1.Carried Forward	1. 2023	1. Shift from 2023 to 2024	1. D.21-06-015
25	ESA Multifamily Common Area Measures	$ 25,350,516	$ 13,414,202	**$ 38,764,717**	$ 204,570	$ 208,999	**$ 413,569**	$ 25,145,945	$ 13,205,203	**$ 38,351,148**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	N/A	N/A	N/A	N/A
26	ESA Multifamily Whole Building	$ 8,820,698	$ 7,822,129	**$ 16,642,827**	$ 2,815,385	$ 2,496,662	**$ 5,312,048**	$ 6,005,313	$ 5,325,466	**$ 11,330,779**	$ -	$ -	**$ -**	$ 6,005,313	$ 5,325,466	**$ 11,330,779**	$ -	$ -	**$ -**	$ 11,330,779	4.9%	1.Carried Forward	1. 2023	1. Shift from 2023 to 2024	1. D.21-06-015
27	CSD Leveraging	$ 558,934	$ 495,658	**$ 1,054,592**	$ 324	$ 378	**$ 702**	$ 558,610	$ 495,280	**$ 1,053,890**	$ -	$ -	**$ -**	$ 558,610	$ 495,280	**$ 1,053,890**	$ -	$ -	**$ -**	$ 1,053,890	0.5%	1.Carried Forward	1. 2023	1. Shift from 2023 to 2024	1. D.21-06-015
28	MCE Pilot	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	N/A	N/A	N/A	N/A
29	SPOC	$ 469,234	$ 233,253	**$ 702,488**	$ 180,005	$ 159,627	**$ 339,632**	$ 289,230	$ 73,627	**$ 362,856**	$ -	$ -	**$ -**	$ 45,366	$ 40,230	**$ 85,595**	$ -	$ -	**$ -**	$ 85,595	0.0%	1.Carried Forward	1. 2023	1. Shift from 2023 to 2024	1. D.21-06-015
30	**Multi-Family TOTAL**	**$ 44,979,212**	**$ 30,637,921**	**$ 75,617,133**	**$ 4,043,366**	**$ 4,458,507**	**$ 8,501,873**	**$ 40,935,846**	**$ 26,179,414**	**$ 67,115,260**	**$ -**	**$ -**	**$ -**	**$ 15,546,036**	**$ 12,940,814**	**$ 28,486,851**	**$ -**	**$ -**	**$ -**	**$ 28,486,851**	12.4%	-	-	-	-
31																									
32	Training Center	$ 226,150	$ 200,548	**$ 426,698**	$ 240,904	$ 213,632	**$ 454,536**	$ (14,755)	$ (13,084)	**$ (27,839)**	$ 14,755	$ 13,084	**$ 27,839**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 27,839	0.0%	1. Current Year Authorized 2. Current Year Authorized	1. 2023 2. 2023	1. Shift from electric to electric. 2. Shift from gas to gas.	1. D.21-06-015 2. D.21-06-015
33	Inspections	$ 2,076,749	$ 1,841,646	**$ 3,918,395**	$ 831,685	$ 737,532	**$ 1,569,217**	$ 1,245,064	$ 1,104,113	**$ 2,349,177**		$ (1,104,113)	**$ (1,104,113)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (1,104,113)	-0.5%	1. Current Year Authorized	1. 2023	1. Shift from gas to gas	1. D.21-06-015
34	Marketing and Outreach	$ 1,033,685	$ 916,664	**$ 1,950,350**	$ 1,178,109	$ 1,044,741	**$ 2,222,850**	$ (144,424)	$ (128,077)	**$ (272,501)**	$ 144,424	$ 128,077	**$ 272,501**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 272,501	0.1%	1. Current Year Authorized 2. Current Year Authorized	1. 2023 2. 2023	1. Shift from electric to electric. 2. Shift from gas to gas.	1. D.21-06-015 2. D.21-06-015
35	Statewide ME&O	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	N/A	N/A	N/A	N/A
36	M&E Studies	$ 380,951	$ 276,344	**$ 657,295**	$ (23,184)	$ (20,559)	**$ (43,743)**	$ 404,135	$ 296,904	**$ 701,039**	$ -	$ -	**$ -**	$ 404,135	$ 296,904	**$ 701,039**	$ -	$ -	**$ -**	$ 701,039	0.3%	1.Carried Forward	1. 2023	1. Shift from 2023 to 2024	1. D.21-06-015
37	Regulatory Compliance	$ 316,168	$ 280,375	**$ 596,543**	$ 205,096	$ 181,878	**$ 386,974**	$ 111,071	$ 98,497	**$ 209,568**	$ -	$ (98,497)	**$ (98,497)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (98,497)	0.0%	1. Current Year Authorized	1. 2023	1. Shift from gas to gas	1. D.21-06-015
38	General Administration	$ 3,782,809	$ 3,354,566	**$ 7,137,375**	$ 2,777,684	$ 2,463,229	**$ 5,240,913**	$ 1,005,125	$ 891,337	**$ 1,896,462**	$ -	$ (891,337)	**$ (891,337)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (891,337)	-0.4%	1. Current Year Authorized	1. 2023	1. Shift from gas to gas	1. D.21-06-015
39	CPUC Energy Division	$ 33,782	$ 29,958	**$ 63,740**	$ 18,214	$ 16,152	**$ 34,366**	$ 15,568	$ 13,806	**$ 29,374**	$ -	$ (13,806)	**$ (13,806)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (13,806)	0.0%	1. Current Year Authorized	1. 2023	1. Shift from gas to gas	1. D.21-06-015
40	**Administration TOTAL**	**$ 7,850,294**	**$ 6,900,101**	**$ 14,750,395**	**$ 5,228,509**	**$ 4,636,605**	**$ 9,865,114**	**$ 2,621,785**	**$ 2,263,496**	**$ 4,885,281**	**$ 159,179**	**$ (1,966,592)**	**$ (1,807,414)**	**$ 404,135**	**$ 296,904**	**$ 701,039**	**$ -**	**$ -**	**$ -**	**$ (1,106,375)**	-0.5%	-	-	-	-
41	ESA Pilot Plus and Pilot Deep	$ 8,810,798	$ 7,813,348	**$ 16,624,146**	$ 2,186,725	$ 1,939,171	**$ 4,125,896**	$ 6,624,072	$ 5,874,177	**$ 12,498,249**	$ -	$ -	**$ -**	$ 6,624,072	$ 5,874,177	**$ 12,498,249**	$ -	$ -	**$ -**	$ 12,498,249	5.4%	1.Carried Forward	1. 2023	1. Shift from 2023 to 2024	1. D.21-06-015
42	Building Electrification	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	N/A	N/A	N/A	N/A
43	Clean Energy Homes	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	N/A	N/A	N/A	N/A
44	SASH/MASH	$ 9,566,416	$ -	**$ 9,566,416**	$ -	$ -	**$ -**	$ 9,566,416	$ -	**$ 9,566,416**	$ -	$ -	**$ -**	$ 9,566,416	$ -	**$ 9,566,416**	$ -	$ -	**$ -**	$ 9,566,416	4.2%	1.Carried Forward	1. 2023	1. Shift from 2023 to 2024	1. D.21-06-015 and AL 7028-E
45																									
46	**TOTAL PROGRAM COSTS**	**$ 130,374,789**	**$ 99,173,465**	**$ 229,548,254**	**$ 59,914,265**	**$ 72,589,629**	**$ 132,503,894**	**$ 70,460,524**	**$ 26,583,836**	**$ 97,044,361**	**$ (6,225,173)**	**$ 6,225,173**	**$ 0**	**$ 32,657,708**	**$ 19,570,410**	**$ 52,228,118**	**$ -**	**$ -**	**$ -**	**$ 52,228,118**	**22.8%**	-	-	-	-
47	Carryforward from 2023 and prior years [3]	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 32,657,708	$ 19,570,410	$ 52,228,118	$ -	$ -	$ -	$ -					
48	Approved Budget for Unspent Funds in 2023	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -					
49	**CARRY FORWARD / CARRY BACK [4]**	**$ 130,374,789**	**$ 99,173,465**	**$ 229,548,254**	**$ 59,914,265**	**$ 72,589,629**	**$ 132,503,894**	**$ 70,460,524**	**$ 26,583,836**	**$ 97,044,361**	**$ (6,225,173)**	**$ 6,225,173**	**$ 0**	**$ 32,657,708**	**$ 19,570,410**	**$ 52,228,118**	**$ -**	**$ -**	**$ -**	**$ 52,228,118**					

50 [1] Shifted a total of $8,031,935 from electric budget categories to electric budget categories. Shifted a total of $6,528,460 from gas budget categories to gas budget categories. Shifted a total of $6,225,173 from electric budget categories to gas budget categories.

51 [2] Included carry forward unspent fund for a total of $47,750,475 from 2022 to 2023. Carried forward budget categories include Pilot, Studies, MF SPOC, MF CAM, and Pilot Plus and Pilot Deep.

52 [3] Carried forward a total of $52,228,118 from 2023 to 2024. Carried forward budget categories include Pilot, Studies, MFWB (includes SPOC, In-Unit, CAM and WB, CSD Leveraging, and Implementer administrative budget categories), Pilot Plus and Pilot Deep, and SASH/MASH Unspent Funds.

53 [4] Per D.21-06-015, OP 181, 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 $26 million in ESA electric unspent fund to off set 2024 collection, submitted via PG&E's Annual Electric True-Up advice letter 7116-E .

ESA Table 12 - ESA Categorical and Other Enrollment
Pacific Gas and Electric Company
Program Year 2023 Annual Report

ESA Table 12A
Main (SF, MH, MF In-Unit) [1]

Type of Enrollment	Number of Homes Treated
Women, Infants, and Children Program (WIC)	3330
Supplemental Security Income (SSI)	3416
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	3997
CalWORKs/Temporary Assistance for Needy Families (TANF) or Tribal TANF	137
Tribal TANF	Combined with TANF
Medicaid/Medi-Cal for Families	11698
Healthy Families A&B	6690
National School Lunch Program (NSLP) - Free Lunch	201
Low-income Home Energy Assistance Program (LIHEAP)	280
Bureau of Indian Affairs General Assistance	0
Head Start Income Eligible - (Tribal Only)	6
CARE Income Certified	3064
80/20 Rule [2]	1946
Targeted Self Certification	4037
Multiple Categorical Programs	2312
Standard Enrollment	24404
Total	**65518**

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit).

[2] Pursuant to D.01-03-028 OP 3(a) which is applicable to master-metered as well as individual metered homes which allows treatment of property when 80% of tenants are income qualified for ESA Program.

ESA Table 12B
ESA Pilot Plus and Pilot Deep [3]

Type of Enrollment	Number of Homes Treated
Women, Infants, and Children Program (WIC)	1
Supplemental Security Income (SSI)	2
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	9
CalWORKs/Temporary Assistance for Needy Families (TANF)	0
Tribal TANF	0
Medicaid/Medi-Cal for Families	18
Healthy Families A&B	0
National School Lunch Program (NSLP) - Free Lunch	0
Low-income Home Energy Assistance Program (LIHEAP)	1
Bureau of Indian Affairs General Assistance	0
Head Start Income Eligible - (Tribal Only)	0
CARE Income Certified	0
80/20 Rule	0
Targeted Self Certification	0
Multiple Programs	1
Standard Enrollment	24
Total	**56**

ESA Table 12C
ESA Building Electrification (SCE Only)

Type of Enrollment	Number of Homes Treated
Women, Infants, and Children Program (WIC)	0
Supplemental Security Income (SSI)	0
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	0
CalWORKs/Temporary Assistance for Needy Families (TANF)	0
Tribal TANF	0
Medicaid/Medi-Cal for Families	0
Healthy Families A&B	0
National School Lunch Program (NSLP) - Free Lunch	0
Low-income Home Energy Assistance Program (LIHEAP)	0
Bureau of Indian Affairs General Assistance	0
Head Start Income Eligible - (Tribal Only)	0
CARE Income Certified	0
80/20 Rule	0
Targeted Self Certification	0
Standard Enrollment	0
Total	**0**

Note:
*Categorical enrollment is not applicable to MFWB or Clean Energy Homes.

ESA Table 13A - ESA Leveraging & Integration [1] [6]
Pacific Gas and Electric Company
Program Year 2023 Annual Report

ESA Table 13A-1
ESA Main (SF, MH, MF In-Unit) [1]

Partner	Brief Description of Effort	Relationship outside of the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
Self Help Home Improvement Project (SHHIP)	Coordination with LIHEAP	Yes	Yes	$67,970 [7]	Unknown	Unknown	80	Installation contractor provided dollars saved	N	Unknown amount of energy savings.
ESA Water-Energy Coordination Program	This purpose of this effort is to allow ESA contractors to offer water conservation measures while they treat ESA customers. Water Agencies select from a standardized menu of options that can include replacing toilets, leak detection, meter checks, etc. Water offerings are paid by each participating Water Agency.	Yes	Yes	Unknown	~ 12,117 kWh/year ~ 11,164,314 million gallons of water/year	TBD	516 homes received water measures in 2023	CPUC Water / Energy Calculator documented in the Water Energy Nexus workpaper	N	Unknown amount of dollars saved.

ESA Table 13A-2
MF CAM and MFWB

Partner	Brief Description of Effort	Relationship outside of the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
3CE (CCCE) New Construction Electrification Program	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
3CE (CCCE) Electrify your Home	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
3C-REN Multifamily Home Energy Savings	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Air District Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
BAAQMD Charge! Program	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
BayREN BAMBE	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	9	N/A	N/A	
BayREN Home	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
BUILD	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	2	N/A	N/A	
CalEHP	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	1	N/A	N/A	
CEDA	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Comfortable Homes Program	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Comfortably CA	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Demand Management Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Energy Star Rebate Finder	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Energy Smart Homes	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	5	N/A	N/A	
ESA MF CAM	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
ESA Main	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
ESA MFES	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	24	N/A	N/A	
GoGreen Financing	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
LADWP Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
LIHEAP	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
LIWP	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	9	N/A	N/A	
MCE MFES and LIFT programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
MCE SEM	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	1	N/A	N/A	
MESP	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	1	N/A	N/A	
MID Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Non PG&E EV Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
OBF	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Other Utility SPOC	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Peninsula Clean Energy Rebates	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Peninsula Clean Energy Zero Percent Loans	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
PACE	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
PG&E EV Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
PG&E Market Place	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	No	N/A	N/A	N/A	N/A	0	N/A	N/A	
RAHP	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Rebate Catalogue	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SCE Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SCG Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SDG&E Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
South West Gas programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SGIP	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Silicon Valley Clean Energy FutureFit Homes	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	No	N/A	N/A	N/A	N/A	0	N/A	N/A	
Smart Energy Line	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	No	N/A	N/A	N/A	N/A	0	N/A	N/A	
SMUD Home Performance Program	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SMUD Multifamily	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SMUD Neighborhood Solarshares	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SMUD Smart Homes	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	1	N/A	N/A	
SoCalREN Multifamily Program	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
SOMAH	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	5	N/A	N/A	
TECH	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	2	N/A	N/A	
TID Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	
Water District Programs	SPOC refers multifamily customers to relevant program offerings to maximize customer benefits and leverage additional programs	Yes	N/A	N/A	N/A	N/A	0	N/A	N/A	

ESA Table 13A-3
ESA Pilot Plus and Pilot Deep [6]

Partner	Brief Description of Effort	Relationship outside of the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
-	-	-	-	-	-	-	-	-	-	-

ESA Table 13A-4
ESA Building Electrification (SCE Only)

Partner	Brief Description of Effort	Relationship outside of the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-

ESA Table 13A-5
ESA Clean Energy Homes (SCE Only)

Partner	Brief Description of Effort	Relationship outside of the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-

[1] Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.

[2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).

[3] Annual Energy savings/benefits for measures installation. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.

[4] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

[5] In footnotes, provide information on methodology used to calculate cost and/or resource savings.

[6] As of the end of 2023, PG&E and its Pilot Implementer had not formalized any partnerships for leveraging and integration.

[7] Reported by the ESA Implementers with their tracking from ESA contractors.

Notes:

Summary data includes ESA Main Program (SF, MH, MF-In-Unit), Pilot Plus and Pilot Deep, MF CAM, Building Electrification, and Clean Energy Homes.

Fields not applicable to specific efforts are marked "N/A".

ESA Table 13B - ESA Clean Energy Referral, Leveraging, and Coordination
Pacific Gas and Electric Company
Program Year 2023 Annual Report

Partner	Brief Description of Effort	# of Referrals [1]	# of Leveraging [2]	# of Coordination Efforts [3]	# of Leads [4]	# of Enrollments from Successful Leads [5]
LIHEAP	When a home does not qualify for R&R measures in ESA, contractors connect the customer to LIHEAP contractors.	3,503	1,730	1,231	2,406	1,261
DAC-SASH	Coordination with the DAC Single-family Affordable Solar Homes Program Administrator, GRID Alternatives, on referrals and homes treated.	N/A	N/A	N/A	604	74
ESA Water-Energy Coordination Program	Allows ESA contractors to offer water conservation measures while they treat ESA customers. Water Agencies select from a standardized menu of options that can include replacing toilets, leak detection, meter checks, etc. Water offerings are paid by each participating Water Agency.	N/A	N/A	N/A	N/A	516
REACH	REACH provides an energy credit for up to $300 based on the past due bill (energy credit support is subject to funding availability). A non-profit organization runs the REACH program from 170 offices in Northern and Central California.	750	33	10	2	2
SmartAC Program	SmartAC is a voluntary program that helps prevent power interruptions. It encourages customer participation by providing incentives and instant rebates for purchasing an eligible smart thermostat.	15,335	N/A	15,335	N/A	N/A
SoCal Gas ESA	When a home is has PGE Electric Only and gas service is through SoCal Gas, contractors connect the customer to SoCal Gas ESA for additional assistance w/ ESA measures.	1,022	1,287	1,567	816	776
SJV DAC	Residential Electrification in three communities in the San Joaquin Valley: Allensworth, Cantua Creek, and Seville. Customer's eligible for this service, ESA contractor will enroll customer in SJV DAC and once home is fully converted will also enroll through PGE ESA to receive additional ESA measures not offered through this program.	N/A	N/A	N/A	N/A	N/A
SMUD	ESA Subcontractor provides customer with contact information for SMUD for possible assistance.	59	212	212	13	13

[1] # of referral includes leads provided to a Partner Program by ESA.
[2] # of leveraging accounts for households that have received treatments by both ESA and the Partner Program where there were shared resources/cost, such as Direct Tech, CSD, Water Energy, Refrigerator, etc..
[3] # of coordination efforts include joint marketing activities by ESA and its Partner Program. These joint marketing activities may include social media, leave behinds, customer outreach events and activities..
[4] # of customer leads provided to ESA by Partner Program.
[5] This includes customer leads that result in actual ESA enrollments/treatment in PY 2023. It does not include leads that are in the intake process or have been treated in prior years.

Notes: Includes data from ESA Main. Pilot Plus/Deep additionally referred 384 customers to LIHEAP, though partnership with local LIHEAP agencies were not formalized.

ESA Table 14 - ESA Expenditures for Pilots and Studies
Pacific Gas and Electric Company
Program Year 2023 Annual Report

	Authorized 2021-26 Funding			2023 Expenses			Cycle to Date Expenses			% of Budget Expensed		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots												
Virual Energy Coach (PG&E only) [7]	$689,000	$611,000	$1,300,000	-$121,734	-$107,953	-$229,688	-$298	-$265	-$563	0%	0%	0%
ESA Pilot Plus and Pilot Deep	$23,273,909	$20,639,127	$43,913,036	$2,186,725	$1,939,171	$4,125,896	$2,685,491	$2,381,474	$5,066,965	12%	12%	12%
Total Pilots	**$23,962,909**	**$21,250,127**	**$45,213,036**	**$2,064,991**	**$1,831,218**	**$3,896,209**	**$2,685,193**	**$2,381,209**	**$5,066,402**	**11%**	**11%**	**11%**
Studies [1]												
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study [2]	$ 52,125	$ 22,875	$ 75,000	$ 244	$ 216	$ 460	$ 42,169	$ 32,720	$ 74,890	81%	143%	100%
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study [3]	$ 39,750	$ 35,250	$ 75,000	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study [3]	$ 39,750	$ 35,250	$ 75,000	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Joint IOU - Statewide CARE-ESA Categorical Study [4]	$ 11,925	$ 10,575	$ 22,500	$ (1,145)	$ (1,015)	$ (2,160)	$ 11,922	$ 10,572	$ 22,494	100%	100%	100%
Energy Impact Evaluation [5]	$ 238,500	$ 211,500	$ 450,000	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Non Energy Impact Study [5]	$ 79,500	$ 70,500	$ 150,000	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Joint IOU - Process Evaluation Studies (1-4 Studies) [5]	$ 79,500	$ 70,500	$ 150,000	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Rapid Feedback Research and Analysis [6]	$ 159,000	$ 141,000	$ 300,000	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Total Studies	**$700,050**	**$597,450**	**$1,297,500**	**-$901**	**-$799**	**-$1,700**	**$54,091**	**$43,293**	**$97,384**	**8%**	**7%**	**8%**

[1] Authorized per D.21-06-015. Funds for pilots and studies may be rolled over to the next program year or borrowed from a future program year within the cycle, to allow for flexibility in scheduling changes with these efforts. Funding for studies is not solely supported via the ESA program budget; some studies are jointly supported via the CARE budget. Funding amounts listed reflect PG&E's 30% allocation among the IOUs, except for PG&E-only studies including the "Rapid Feedback Research and Analysis". Final authorized budgets may be adjusted by the ESA/CARE Studies Working Group per D.21-06-015.

[2] PG&E's Advice Letter 4193-G/5718-E approved Joint Utilities' 2022 LINA Study for $500,000. SCE held the statewide contract for this co-funded study. PG&E's 30% allocation is $150,000, funded 50/50 via the ESA and CARE budgets. The 2022 LINA commenced in January 2021, and was completed in December 2022. The Joint Utilities carried over committed, unspent 2021 LINA funding forward to 2022 and until the study was completed.

[3] Authorized per D.21-06-015, the 2025 and 2028 Low Income Needs Assessments (LINA) are required to be completed by Dec 2025 and Dec 2028, respectively.

[4] Authorized per D.21-06-015, the Categorical Study is funded 50/50 via the ESA and CARE budgets.

[5] Authorized per D.21-06-015, to be conducted during PY 2023-26.

[6] Authorized per D.21-06-015, for each IOU to use for IOU-specific studies as needed. Unused annual budget may be carried forward until the end of the cycle.

[7] VEC Pilot total authorized budget $1.3M, ($325K annually, 2021-2024. Cycle to date is $-563; incurred $76,562 in 2021, $152,563 in 2022, and a refund credit of $-229,688 in 2023 when the implementer contract was cancelled. Any unspent funds after 2024 will either be used to off-set collection or carry forward for pilots.

	A	B	C
2	**ESA Table 15 - Tribal Outreach [1]**		
3	**Pacific Gas and Electric Company**		
4	**Program Year 2023 Annual Report**		
5			
6	**OUTREACH STATUS**	**Quantity (Includes CARE, FERA, and ESA)**	**List of Participating Tribes**
7	Tribes completed ESA Meet & Confer	18	Bear River of Rohnerville Rancheria, Big Valley Band of Pomo Indians, Buena Vista Rancheria, Chico Ranch Rancheria, Ione Band of Miwok Indians of California, Hoopa Valley Tribe, Hoopa Valley TANF, Karuk Tribe, Mechoopda Indian Tribe, Middletown Rancheria, Mooretown Rancheria, Paskenta Band of Nomlaki Indians, Pit River Tribe, Tuolumne Me-Wuk Tribe, Trinidad Rancheria, Washoe Native, Wilton Rancheria, and Yurok Tribe
8	Tribes requested outreach materials or applications	9	Bear River Band of the Rohnerville, Hoopa Valley Tribe, Hoopa Tribal TANF, Ione Band of Miwok Indians, Karuk Tribe, Mechoopda Indian Tribe, Middletown Rancheria, North Fork Rancheria, and Tejon Indian Tribe
9	Tribes who have not accepted offer to Meet and Confer	0	N/A
10	Non-Federally Recognized Tribes who participated in Meet & Confer	0	N/A
11	Tribes and Housing Authority sites involved in Focused Project/ESA	4	Ione Band of Miwok Indians, North Fork Rancheria of Mono Indians (Housing Office and TANF offices), Tejon Indian Tribe, and Trinidad Rancheria of Cher-Ae Heights Indian Community.
12	Partnership offer on Tribal Lands	102	**(Federally-Recognized Tribes)** Bear River Band of the Rohnerville Rancheria, Big Lagoon Rancheria, Big Sandy Rancheria, Big Valley Band Rancheria, Blue Lake Rancheria, Buena Vista Rancheria of Mi-Wuk Indians, Cachil DeHe Band of Wintun Indians of the Colusa Indian Community, Cahto Tribe (Laytonville), California Valley Miwok Tribe, Chicken Ranch Rancheria, Cloverdale Rancheria of Pomo Indians of California, Cold Springs Rancheria, Cortina Rancheria, Coyote Valley Band of Pomo Indians, Dry Creek Rancheria of Pomo Indians, Elem Indian Colony, Enterprise Rancheria, Federated Indians of Graton Rancheria, Greenville Rancheria, Grindstone Indian Rancheria, Guidiville Indian Rancheria, Habematolel Pomo of Upper Lake, Hoopa Valley Tribe, Hopland Band of Pomo Indians, Ione Band of Miwok Indians of California, Jackson band of Mi-Wuk Indians, Kashia Band of Pomo Indians of the Stewart's Point Rancheria, Karuk Tribe, Lower Lake (Koi Tribe), Lytton Rancheria of California, Manchester Band of Pomo Indians, Mechoopda Indian Tribe, Middletown Rancheria of Pomo Indians, Mooretown Rancheria, North Fork Rancheria, Paskenta Band of Nomlaki Indians, Picayune Rancheria of Chukchansi Indians, Pinoleville Pomo Nation, Pit River Tribe, Potter Valley Tribe, Redding Rancheria, Redwood Valley, Little River Band of Rancheria of Pomo, Robinson Rancheria, Round Valley Reservation, Santa Ynez Band of Chumash Mission Indians, Scotts Valley Band of Pomo Indians, Sherwood Valley Rancheria, Shingle Springs Band of Miwok Indians, Susanville Indian Rancheria, Table Mountain Rancheria, Tachi-Yokut Tribe (Santa Rosa Rancheria, Leemore, CA), Tejon Indian Tribe, Trinidad Rancheria, Tule River Indian Reservation, Tuolumne Band of Me-Wuk Indians, Tyme Maidu Tribe-Berry Creek Reservation, United Auburn Indian Community, Wilton Rancheria, Wiyot Tribe, Washoe Tribe of CA and NV, Yocha Dehe Wintun Nation, Yurok Tribe. **(Non-Federally Recognized Tribes):** Amah Mutsun Tribal Band, American Indian Council of Mariposa County (Southern Sierra Miwuk Nation), Butte Tribal Council, Calaveras Band of Mi-Wuk Indians, California Choinumni Tribal Project, Chaushila Yokuts, Coastal Band of the Chumash Nation, Coastanoan Ohlone Rumsen-Mutsen Tribe, Dumna Wo-Wah Tribal Government, Dunlap Band of Mono Indians, Dunlap Band of Mono Indians Historical Preservation Society, Haslett Basin Traditional Committee, Honey Lake Maidu, Indian Canyon Mutsun Band of Costanoan, Kern Valley Indian Council, Kawaiisu Tribe. Kings River Choinumni Farm Tribe, Mishewal-Wappo Tribe of Alexander Valley, Muwekma Ohlone Indian Tribe, Nor-Rel-Muk Nation, North Fork Mono Tribe, Northern Band of Mono Yokuts, Noyo River Indian Community, Ohlone Indian Tribe, Salinan Tribe of Monterey San Luis Obispo and San Benito Counties, San Luis Obispo County Chumash Council, Shelbelna Band of Mendocino Coast Pomo Indians, Sierra Mono Museum, Strawberry Valley Rancheria, The Mono Nation, Traditional Choinumni Tribe (East of Kings River), Trina Marine Ruano Family, Tsungwe Council, Tubatulabal Tribe, Wailaki Tribe, Winnemem Wintu Tribe, Wintu Tribe of Northern California, Wukchumni Tribal Council, Wuksachi Indian Tribe, and Xolon Salinan Tribe.
13	Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	38	**Housing Authority Offices:** Bear River Band of Rohnerville Rancheria, Berry Creek Rancheria, Big Sandy Rancheria, Big Valley Rancheria, Cher-Ae Heights Indian Community of The Trinidad Rancheria, Cloverdale Rancheria, Dry Creek Rancheria, Elem Indian Colony, Enterprise Rancheria of Maidu Indians, Federated Indians of Graton Rancheria, Fort Independence Reservation, Greenville Rancheria, Hoopa Valley Tribe, Ione Band of Miwok Indians, Karuk Tribe, Laytonville Rancheria, North Fork Rancheria, Picayune Rancheria, Pinoleville Reservation, Pit River Tribes, Round Valley Reservation, Santa Rosa Rancheria Tachi-Yokut, Stewarts Point Rancheria (Kashaya Pomo), Susanville Indian Rancheria, Tejon Indian Tribe, Tule River Indian Tribe, Upper Lake Rancheria, Washoe Tribe, Wilton Rancheria, and Yurok Tribe. **TANF Offices:** California Department of Social Services CALWORKS and Family Resilience Branch, Federated Indians of Graton Rancheria, Hoopa Valley Tribe, Karuk Tribe, North Fork Rancheria, Susanville Indian Rancheria, Tuolumne Rancheria, and Owens Valley Career Development Center.
14	Housing Authority and TANF offices who participated in Meet and Confer	6	Big Valley Band of Pomo Indians Housing office, Hoopa Valley Housing Authority, Hoopa Valley TANF Office, North Fork Rancheria Housing Authority, Wilton Rancheria Housing Authority, and Washoe TANF
15	[1] Summary data which includes tribal outreach as related to all programs in the ESA portfolio, including ESA Main Program (SF, MH, MF-In-Unit), Pilot Plus and Pilot Deep, MF CAM, and CSD Leveraging.		

2020 Health Care Effectiveness Data and Information Set (HEDIS®) Quality Rating Scales for Commercial, Medicaid, and Medicare Quality Improvement Programs Year 2020 Annual Report

Line	Measure	Measure Abbreviation	Lowest Percentile	1st Percentile	2nd Percentile	3rd Percentile	4th Percentile	5th Percentile	6th Percentile	7th Percentile	8th Percentile	9th Percentile	10th Percentile
1	**2020 HEDIS MY 2019 Commercial Quality Rating Scales**												
2	Lowest Percentile		1st Percentile	2nd Percentile	3rd Percentile	4th Percentile	5th Percentile	6th Percentile	7th Percentile	8th Percentile	9th Percentile	10th Percentile	
3	Adult BMI Assessment	ABA	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
4	Antibiotic Use for Adults and Older Adults	AAB	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
5	Appropriate Testing for Children with Pharyngitis	CWP	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
6	Appropriate Treatment for Children with Upper Respiratory Infection	URI	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
7	Asthma Medication Ratio	AMR	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
8	Avoidance of Antibiotic Treatment in Adults with Acute Bronchitis	AAB	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
9	Breast Cancer Screening	BCS	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
10	Cervical Cancer Screening	CCS	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
11	Chlamydia Screening in Women	CHL	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
12	Comprehensive Diabetes Care: Hemoglobin A1c (HbA1c) Testing	CDC-H	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
13	Comprehensive Diabetes Care: HbA1c Poor Control (>9.0%)	CDC-H	90.00%	85.00%	80.00%	75.00%	70.00%	65.00%	60.00%	55.00%	50.00%	45.00%	
14	Comprehensive Diabetes Care: Eye Exam (Retinal) Performed	CDC-E	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
15	Comprehensive Diabetes Care: Medical Attention for Nephropathy	CDC-N	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
16	Controlling High Blood Pressure	CBP	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
17	Cervical Cancer Screening	CCS	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
18	Chlamydia Screening in Women	CHL	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
19	Comprehensive Diabetes Care: Hemoglobin A1c (HbA1c) Testing	CDC-H	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
20	Comprehensive Diabetes Care: HbA1c Poor Control (>9.0%)	CDC-H	90.00%	85.00%	80.00%	75.00%	70.00%	65.00%	60.00%	55.00%	50.00%	45.00%	
21	Comprehensive Diabetes Care: Eye Exam (Retinal) Performed	CDC-E	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
22	Comprehensive Diabetes Care: Medical Attention for Nephropathy	CDC-N	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
23	Controlling High Blood Pressure	CBP	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
24	Cervical Cancer Screening	CCS	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
25	Chlamydia Screening in Women	CHL	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
26	Comprehensive Diabetes Care: Hemoglobin A1c (HbA1c) Testing	CDC-H	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
27	Comprehensive Diabetes Care: HbA1c Poor Control (>9.0%)	CDC-H	90.00%	85.00%	80.00%	75.00%	70.00%	65.00%	60.00%	55.00%	50.00%	45.00%	
28	Comprehensive Diabetes Care: Eye Exam (Retinal) Performed	CDC-E	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
29	Comprehensive Diabetes Care: Medical Attention for Nephropathy	CDC-N	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
30	Controlling High Blood Pressure	CBP	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
31	Cervical Cancer Screening	CCS	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
32	Chlamydia Screening in Women	CHL	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
33	Comprehensive Diabetes Care: Hemoglobin A1c (HbA1c) Testing	CDC-H	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
34	Comprehensive Diabetes Care: HbA1c Poor Control (>9.0%)	CDC-H	90.00%	85.00%	80.00%	75.00%	70.00%	65.00%	60.00%	55.00%	50.00%	45.00%	
35	Comprehensive Diabetes Care: Eye Exam (Retinal) Performed	CDC-E	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
36	Comprehensive Diabetes Care: Medical Attention for Nephropathy	CDC-N	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
37	Controlling High Blood Pressure	CBP	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
38	**2020 HEDIS MY 2019 Medicaid Quality Rating Scales**												
39	Lowest Percentile		1st Percentile	2nd Percentile	3rd Percentile	4th Percentile	5th Percentile	6th Percentile	7th Percentile	8th Percentile	9th Percentile	10th Percentile	
40	Adult BMI Assessment	ABA	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
41	Antibiotic Use for Adults and Older Adults	AAB	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
42	Appropriate Testing for Children with Pharyngitis	CWP	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
43	Appropriate Treatment for Children with Upper Respiratory Infection	URI	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
44	Asthma Medication Ratio	AMR	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
45	Avoidance of Antibiotic Treatment in Adults with Acute Bronchitis	AAB	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
46	Breast Cancer Screening	BCS	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
47	Cervical Cancer Screening	CCS	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
48	Chlamydia Screening in Women	CHL	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
49	Comprehensive Diabetes Care: Hemoglobin A1c (HbA1c) Testing	CDC-H	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
50	Comprehensive Diabetes Care: HbA1c Poor Control (>9.0%)	CDC-H	90.00%	85.00%	80.00%	75.00%	70.00%	65.00%	60.00%	55.00%	50.00%	45.00%	
51	Comprehensive Diabetes Care: Eye Exam (Retinal) Performed	CDC-E	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
52	Comprehensive Diabetes Care: Medical Attention for Nephropathy	CDC-N	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
53	Controlling High Blood Pressure	CBP	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
54	Cervical Cancer Screening	CCS	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
55	Chlamydia Screening in Women	CHL	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
56	Comprehensive Diabetes Care: Hemoglobin A1c (HbA1c) Testing	CDC-H	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
57	Comprehensive Diabetes Care: HbA1c Poor Control (>9.0%)	CDC-H	90.00%	85.00%	80.00%	75.00%	70.00%	65.00%	60.00%	55.00%	50.00%	45.00%	
58	Comprehensive Diabetes Care: Eye Exam (Retinal) Performed	CDC-E	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
59	Comprehensive Diabetes Care: Medical Attention for Nephropathy	CDC-N	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
60	Controlling High Blood Pressure	CBP	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
61	Cervical Cancer Screening	CCS	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
62	Chlamydia Screening in Women	CHL	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
63	Comprehensive Diabetes Care: Hemoglobin A1c (HbA1c) Testing	CDC-H	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
64	Comprehensive Diabetes Care: HbA1c Poor Control (>9.0%)	CDC-H	90.00%	85.00%	80.00%	75.00%	70.00%	65.00%	60.00%	55.00%	50.00%	45.00%	
65	Comprehensive Diabetes Care: Eye Exam (Retinal) Performed	CDC-E	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
66	Comprehensive Diabetes Care: Medical Attention for Nephropathy	CDC-N	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
67	Controlling High Blood Pressure	CBP	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
68	**2020 HEDIS MY 2019 Medicare Quality Rating Scales**												
69	Lowest Percentile		1st Percentile	2nd Percentile	3rd Percentile	4th Percentile	5th Percentile	6th Percentile	7th Percentile	8th Percentile	9th Percentile	10th Percentile	
70	Adult BMI Assessment	ABA	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
71	Antibiotic Use for Adults and Older Adults	AAB	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
72	Appropriate Testing for Children with Pharyngitis	CWP	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
73	Appropriate Treatment for Children with Upper Respiratory Infection	URI	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
74	Asthma Medication Ratio	AMR	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
75	Avoidance of Antibiotic Treatment in Adults with Acute Bronchitis	AAB	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
76	Breast Cancer Screening	BCS	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
77	Cervical Cancer Screening	CCS	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
78	Chlamydia Screening in Women	CHL	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
79	Comprehensive Diabetes Care: Hemoglobin A1c (HbA1c) Testing	CDC-H	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
80	Comprehensive Diabetes Care: HbA1c Poor Control (>9.0%)	CDC-H	90.00%	85.00%	80.00%	75.00%	70.00%	65.00%	60.00%	55.00%	50.00%	45.00%	
81	Comprehensive Diabetes Care: Eye Exam (Retinal) Performed	CDC-E	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
82	Comprehensive Diabetes Care: Medical Attention for Nephropathy	CDC-N	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
83	Controlling High Blood Pressure	CBP	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
84	Cervical Cancer Screening	CCS	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
85	Chlamydia Screening in Women	CHL	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
86	Comprehensive Diabetes Care: Hemoglobin A1c (HbA1c) Testing	CDC-H	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
87	Comprehensive Diabetes Care: HbA1c Poor Control (>9.0%)	CDC-H	90.00%	85.00%	80.00%	75.00%	70.00%	65.00%	60.00%	55.00%	50.00%	45.00%	
88	Comprehensive Diabetes Care: Eye Exam (Retinal) Performed	CDC-E	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
89	Comprehensive Diabetes Care: Medical Attention for Nephropathy	CDC-N	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
90	Controlling High Blood Pressure	CBP	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
91	Cervical Cancer Screening	CCS	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
92	Chlamydia Screening in Women	CHL	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
93	Comprehensive Diabetes Care: Hemoglobin A1c (HbA1c) Testing	CDC-H	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
94	Comprehensive Diabetes Care: HbA1c Poor Control (>9.0%)	CDC-H	90.00%	85.00%	80.00%	75.00%	70.00%	65.00%	60.00%	55.00%	50.00%	45.00%	
95	Comprehensive Diabetes Care: Eye Exam (Retinal) Performed	CDC-E	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	
96	Comprehensive Diabetes Care: Medical Attention for Nephropathy	CDC-N	50.00%	60.00%	65.00%	70.00%	75.00%	80.00%	85.00%	90.00%	95.00%	100.00%	
97	Controlling High Blood Pressure	CBP	30.00%	35.00%	40.00%	45.00%	50.00%	55.00%	60.00%	65.00%	70.00%	75.00%	

CARE Table 1 - CARE Overall Program Expenses
Pacific Gas and Electric Company
Program Year 2023 Annual Report

Category	Overall Expenditures			Authorized Budget [1]	% of Budget Spent	Total Shifted [5]	Shifted to/from?
	Electric	Gas	Total				
Outreach	$3,575,603	$893,901	$4,469,503	$7,425,487	60%	($561,713)	Shifted to Post Enrollment Verification, and IT Programming categories
Processing, Certification, Recertification	$420,728	$105,182	$525,910	$869,400	60%		-
Post Enrollment Verification	$1,328,577	$332,144	$1,660,721	$1,660,721	100%	$147,821	Shifted from Outreach category
IT Programming	$1,229,753	$307,438	$1,537,192	$1,537,192	100%	$413,892	Shifted from Outreach category
CHANGES Program [2]	$154,073	$38,518	$192,591	$525,000	37%	$0	-
Studies and Pilots [3]	$18,381	$4,595	$22,976	$25,000	92%	$0	-
Measurement & Evaluation [4]	$113,036	$28,259	$141,295	$200,000	71%	$0	-
Regulatory Compliance	$187,902	$46,975	$234,877	$380,500	62%	$0	-
General Administration	$535,665	$133,916	$669,581	$1,165,300	57%	$0	-
CPUC Energy Division	$64,150	$16,038	$80,188	$173,000	46%	$0	-
TOTAL Program Costs	**$7,627,867**	**$1,906,967**	**$9,534,834**	**$13,961,600**	**68%**	**$0**	**-**
CARE Rate Discount [6]	$785,277,413	$192,849,048	$978,126,461	$691,973,000	141%	$286,153,461	-
Service Establishment Charge Discount	$0	$0	$0	$0	0%	$0	-
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS [6]	**$792,905,280**	**$194,756,015**	**$987,661,295**	**$705,934,600**	**140%**	**$286,153,461**	**-**

[1] Reflects total authorized funding approved in D.21-06-015, Attachment 1, Table 2.

[2] Decision 15-12-047 transitioned from CHANGES pilot to CHANGES program and funding for the effort is captured herein. D.21-06-015 approved funding for the CHANGES program through CARE program for PYs 2021-2026. Total expenditures also include CHANGES Evaluation expenses.

[3] Reflects the budget and expenses for the CARE portion of the LINA study and Categorical study.

[4] Reflects the budget and expenses for Annual Eligibility Estimates prepared by Athens Research on behalf of the utilities.

[5] Reflects fund shift in accordance with the rules set forth in D.08-11-031 as modified by D.10-10-008, D.16-11-022, D.17-12-009 and D.21-06-015, which granted the IOUs authority to shift funds between the CARE program categories. The information in the "Total Shifted" and "Shifted to/from?" column is for illustrative purposes only, to disclose how funds from the overall authorized budget can be shifted between categories

[6] Total program administrative expenses did not exceed the overall authorized budget. The CARE discount exceeded the authorized amount by $286,153,461. Per D.02-09-021, PG&E is authorized to recover the full value of the discount through the CARE two-way balancing account on an automatic pass-through basis.

CARE Table 2 - CARE Enrollment, Recertification, Attrition, & Enrollment
Pacific Gas and Electric Company
Program Year 2023 Annual Report

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants by Dwelling Type [6]					
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response [4]	Failed PEV	Failed Recertification	Other [5]	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)				Total CARE Participants	Estimated CARE Eligible	Enrollment Rate % (Z/AA)
	Inter-Utility [1]	Intra-Utility [2]	Leveraging [3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)													SF	MF	MH			
January	0	723	0	723	17,567	2,010	1,066	42	20,685	21,408	62,791	19,765	3,276	85,832	n/a	4,419	3,926	7,418	15,763	107,240	5,645				1,475,369	1,402,162	105%
February	0	908	0	908	18,844	1,584	1,136	48	21,612	22,520	12,301	11,552	4,280	28,133	n/a	32,254	7,403	7,667	47,324	50,653	-24,804				1,450,565	1,402,162	103%
March	178	960	0	1,138	17,558	5,087	1,041	97	23,783	24,921	44,997	23,281	3,265	71,543	n/a	8,068	10,891	6,734	25,693	96,464	-772				1,449,793	1,402,162	103%
April	0	1,095	0	1,095	12,902	3,806	745	50	17,503	18,598	17,458	12,183	4,448	34,089	n/a	5,635	2,337	15,899	23,871	52,687	-5,273				1,444,520	1,402,162	103%
May	0	959	0	959	18,315	4,554	1,168	54	24,091	25,050	27,517	21,961	4,324	53,802	n/a	9,094	3,940	18,298	31,332	78,852	-6,282				1,438,238	1,402,162	103%
June	0	1,268	0	1,268	20,890	5,161	623	66	26,740	28,008	27,108	15,978	6,272	49,358	n/a	23,052	2,900	13,328	39,280	77,366	-11,272				1,426,966	1,402,162	102%
July	0	1,309	0	1,309	17,855	6,053	989	59	24,956	26,265	38,378	14,640	6,475	59,493	n/a	5,735	10,385	11,446	27,566	85,758	-1,301				1,425,665	1,402,162	102%
August	0	1,437	0	1,437	19,260	6,349	967	65	26,641	28,078	86,134	14,478	5,751	106,363	n/a	15,524	3,275	2,535	21,334	134,441	6,744				1,432,409	1,402,162	102%
September	0	1,542	0	1,542	16,898	4,741	837	26	22,502	24,044	28,811	15,878	7,119	51,808	n/a	72	8,870	20,950	29,892	75,852	-5,848				1,426,561	1,402,162	102%
October	0	2,337	0	2,337	14,098	5,421	696	13	20,228	22,565	44,715	10,693	6,360	61,768	n/a	10,428	7,577	24,353	42,358	84,333	-19,793				1,406,768	1,402,162	100%
November	0	1,879	0	1,879	9,870	3,234	596	33	13,733	15,612	19,812	6,561	9,917	36,290	n/a	1,692	6,812	9,372	17,876	51,902	-2,264				1,404,504	1,402,162	100%
December	0	1,495	0	1,495	12,181	3,483	6	57	15,727	17,222	17,194	6,914	5,815	29,923	n/a	1,844	8,030	8,910	18,784	47,145	-1,562				1,402,942	1,402,162	100%
YTD Total	**178**	**15,912**	**0**	**16,090**	**196,238**	**51,483**	**9,870**	**610**	**258,201**	**274,291**	**427,216**	**173,884**	**67,302**	**668,402**	**n/a**	**117,817**	**76,346**	**146,910**	**341,073**	**942,693**	**-66,782**	**912,358**	**464,754**	**25,830**	**1,402,942**	**1,402,162**	**100%**

[1] Enrollments via data sharing between the IOUs.
[2] Enrollments via data sharing between departments and/or programs within the utility.
[3] Enrollments via data sharing with programs outside the IOU that serve low-income customers.
[4] PG&E counts attrition due to no response in the Failed PEV and Failed Recertification columns, respectively.
[5] Includes customers who closed their accounts, requested to be removed, or were otherwise ineligible for the program.
[6] Based on SF and MF structure configuration as noted in PG&E's billing system; MH reflects sub-metered tenants

CARE Table 3 - CARE Post-Enrollment Verification Results
Pacific Gas and Electric Company
Program Year 2023 Annual Report

CARE Table 3A - Post-Enrollment Verification Results (Model) 2023

Month	Total CARE Households Enrolled	Households Requested to Verify [1]	% of CARE Enrolled Requested to Verify Total	% of Scheduled Customers not Responsive to the PEV Process	% of Scheduled PEV Customers later verified as Income Eligible	% of De-enrolled Customer Later Re-enrolled by Six Months	% of De-enrolled Customer Later Re-enrolled by Twelve Months	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) [2]	Total Households De-enrolled [3]	% De-enrolled through Post Enrollment Verification [4]	% of Total CARE Households De-enrolled
January	1,475,369	8,214	0.6%	74%	21%	19%	n/a	6,097	364	6,461	79%	0.44%
February	1,450,565	4,747	0.3%	73%	22%	22%	n/a	3,472	220	3,692	78%	0.25%
March	1,449,793	12,710	0.9%	67%	27%	21%	n/a	8,513	748	9,261	73%	0.64%
April	1,444,520	12,409	0.9%	66%	28%	20%	n/a	8,185	748	8,933	72%	0.62%
May	1,438,238	12,706	0.9%	65%	30%	21%	n/a	8,218	691	8,909	70%	0.62%
June	1,426,966	16,568	1.2%	63%	32%	19%	n/a	10,440	866	11,306	68%	0.79%
July	1,425,665	11,742	0.8%	64%	31%	n/a	n/a	7,524	569	8,093	69%	0.57%
August	1,432,409	14,966	1.0%	66%	29%	n/a	n/a	9,949	719	10,668	71%	0.74%
September	1,426,561	1,168	0.1%	69%	29%	n/a	n/a	802	32	834	71%	0.06%
October	1,406,768	1,186	0.1%	67%	30%	n/a	n/a	790	42	832	70%	0.06%
November	1,404,504	1,186	0.1%	69%	27%	n/a	n/a	821	42	863	73%	0.06%
December	1,402,942	1,184	0.1%	63%	32%	n/a	n/a	744	58	802	68%	0.06%
YTD Total	**1,402,942**	**98,786**	**7.0%**	**66%**	**28%**			**65,555**	**5,099**	**70,654**	**72%**	**5.04%**

[1] Includes customers selected randomly or via PG&E's CARE probability model.
[2] Includes customers verified as over income or who requested to be de-enrolled.
[3] Verification results are tied to the month initiated.
[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.

CARE Table 3B - Post-Enrollment Verification Results (Electric only High Usage) 2023

Month	Total CARE Households Enrolled	Households Requested to Verify [1]	% of CARE Enrolled Requested to Verify Total	% of Scheduled Customers not Responsive to the PEV Process	% of Scheduled PEV Customers later verified as Income Eligible	% of De-enrolled Customer Later Re-enrolled by Six Months	% of De-enrolled Customer Later Re-enrolled by Twelve Months	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) [2]	Total Households De-enrolled [3]	% De-enrolled through HUV Post Enrollment Verification	% of Total CARE Households De-enrolled
January	1,475,369	2,498	0.2%	87%	11%	24%	n/a	2,170	61	2,231	89%	0.15%
February	1,450,565	2,222	0.2%	84%	13%	23%	n/a	1,870	67	1,937	87%	0.13%
March	1,449,793	533	0.0%	80%	16%	25%	n/a	426	20	446	84%	0.03%
April	1,444,520	2,459	0.2%	79%	18%	19%	n/a	1,941	79	2,020	82%	0.14%
May	1,438,238	9,448	0.7%	80%	17%	18%	n/a	7,549	289	7,838	83%	0.54%
June	1,426,966	2,709	0.2%	79%	18%	18%	n/a	2,140	79	2,219	82%	0.16%
July	1,425,665	898	0.1%	75%	22%	n/a	n/a	677	24	701	78%	0.05%
August	1,432,409	1,467	0.1%	75%	22%	n/a	n/a	1,100	45	1,145	78%	0.08%
September	1,426,561	1,286	0.1%	78%	19%	n/a	n/a	1,003	40	1,043	81%	0.07%
October	1,406,768	1,242	0.1%	79%	20%	n/a	n/a	976	23	999	80%	0.07%
November	1,404,504	1,563	0.1%	81%	16%	n/a	n/a	1,270	42	1,312	84%	0.09%
December	1,402,942	1,143	0.1%	74%	22%	n/a	n/a	851	43	894	78%	0.06%
YTD Total	**1,402,942**	**27,468**	**2.0%**	**80%**	**17%**			**21,973**	**812**	**22,785**	**83%**	**1.62%**

[1] Includes all participants who were selected for high usage verification process.
[2] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.
[3] Verification results are tied to the month initiated.

	A	B	C	D	E	F	G
2	**CARE Table 4 - CARE Self-Certification and Self-Recertification Applications [1]**						
3	**Pacific Gas and Electric Company**						
4	**Program Year 2023 Annual Report**						
5							
6		**Provided [2]**	**Received**	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**
7	**Total (Y-T-D)**	2,886,504	538,530	496,855	38,414	3,261	173,884
8	**Percentage [3]**		100%	92%	7%	1%	32%
9	[1] Includes sub-metered customers.						
10	[2] Includes number of applications provided via direct mail campaigns, call centers, bill inserts and other outreach methods. Because there are other means by which customers obtain applications which are not counted, this number is only an approximation.						
11	[3] Percentage of Received. Duplicates are also counted as Approved, so the total will not add up to 100%.						

CARE Table 5 - CARE Enrollment by County
Pacific Gas and Electric Company
Program Year 2023 Annual Report

County	Estimated Eligible			Total Participants			Enrollment Rate		
	Urban	Rural [1]	Total	Urban	Rural [1]	Total	Urban	Rural [1]	Total
ALAMEDA	113,915	3	113,918	119,192	1	119,193	105%	36%	105%
ALPINE	0	119	119	0	11	11	n/a	9%	9%
AMADOR	0	5,407	5,408	0	4,161	4,161	0%	77%	77%
BUTTE	18,373	9,673	28,047	18,615	10,921	29,536	101%	113%	105%
CALAVERAS	9	7,806	7,816	15	4,948	4,963	163%	63%	64%
COLUSA	14	3,484	3,498	4	3,232	3,236	28%	93%	93%
CONTRA COSTA	79,725	0	79,725	90,616	0	90,616	114%	0%	114%
EL DORADO	7,165	5,403	12,569	5,815	5,530	11,345	81%	102%	90%
FRESNO	123,725	197	123,922	146,781	80	146,861	119%	41%	119%
GLENN	1	4,623	4,623	0	4,384	4,384	0%	95%	95%
HUMBOLDT	0	23,207	23,207	0	17,959	17,959	n/a	77%	77%
KERN	40,154	59,862	100,016	48,185	66,157	114,342	120%	111%	114%
KINGS	124	7,889	8,013	124	9,524	9,648	100%	121%	120%
LAKE	0	13,627	13,627	0	12,063	12,063	n/a	89%	89%
LASSEN	0	208	208	0	167	167	n/a	80%	80%
MADERA	14,252	5,951	20,203	17,008	5,320	22,328	119%	89%	111%
MARIN	18,347	0	18,347	13,873	0	13,873	76%	n/a	76%
MARIPOSA	27	3,868	3,895	16	2,188	2,204	60%	57%	57%
MENDOCINO	10	14,028	14,037	1	10,123	10,124	10%	72%	72%
MERCED	18,407	21,428	39,834	19,029	21,115	40,144	103%	99%	101%
MONTEREY	31,533	4,709	36,243	38,592	6,380	44,972	122%	135%	124%
NAPA	12,293	0	12,294	10,395	0	10,395	85%	0%	85%
NEVADA	6	11,876	11,882	1	8,888	8,889	17%	75%	75%
PLACER	18,831	10,197	29,027	14,562	7,242	21,804	77%	71%	75%
PLUMAS	58	2,442	2,500	10	1,465	1,475	17%	60%	59%
SACRAMENTO	122,836	0	122,836	95,456	0	95,456	78%	n/a	78%
SAN BENITO	114	4,401	4,515	82	5,335	5,417	72%	121%	120%
SAN BERNARDINO	52	338	390	20	246	266	38%	73%	68%
SAN FRANCISCO	64,650	0	64,650	51,771	0	51,771	80%	n/a	80%
SAN JOAQUIN	64,331	7,239	71,570	75,868	9,386	85,254	118%	130%	119%
SAN LUIS OBISPO	12,128	17,118	29,246	6,028	15,039	21,067	50%	88%	72%
SAN MATEO	38,626	0	38,626	36,091	0	36,091	93%	n/a	93%
SANTA BARBARA	17,559	830	18,388	20,646	899	21,545	118%	108%	117%
SANTA CLARA	86,852	2,985	89,837	101,504	3,059	104,563	117%	102%	116%
SANTA CRUZ	19,294	3	19,297	18,815	1	18,816	98%	30%	98%
SHASTA	11,580	11,501	23,081	9,172	8,249	17,421	79%	72%	75%
SIERRA	4	430	434	2	122	124	47%	28%	29%
SISKIYOU	0	20	20	0	7	7	n/a	35%	35%
SOLANO	38,779	0	38,779	43,473	0	43,473	112%	n/a	112%
SONOMA	40,038	2,708	42,746	37,569	2,542	40,111	94%	94%	94%
STANISLAUS	27,667	22,877	50,543	23,730	22,229	45,959	86%	97%	91%
SUTTER	10,832	0	10,833	12,392	0	12,392	114%	0%	114%
TEHAMA	13	12,462	12,475	3	10,445	10,448	23%	84%	84%
TRINITY	0	696	696	0	276	276	n/a	40%	40%
TULARE	582	7,649	8,231	342	9,412	9,754	59%	123%	118%
TUOLUMNE	0	8,834	8,834	0	6,476	6,476	n/a	73%	73%
YOLO	23,042	2	23,044	20,576	0	20,576	89%	0%	89%
YUBA	9,995	118	10,113	10,892	94	10,986	109%	79%	109%
Total	**1,085,943**	**316,219**	**1,402,162**	**1,107,266**	**295,676**	**1,402,942**	**102%**	**94%**	**100%**

[1] Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.

CARE Table 6 - CARE Recertification Results [5]
Pacific Gas and Electric Company
Program Year 2023 Annual Report

2023	Total CARE Households	Households Requested to Recertify [1]	% of Households Total (C/B)	Households Recertified [2]	Households De-enrolled [3]	Recertification Rate % [4] (E/C)	% of Total Households De-enrolled (F/B)
January	1,475,369	6,330	0.4%	3,993	2,337	63%	0.16%
February	1,450,565	9,676	0.7%	5,736	3,940	59%	0.27%
March	1,449,793	6,878	0.5%	3,978	2,900	58%	0.20%
April	1,444,520	20,774	1.4%	10,389	10,385	50%	0.72%
May	1,438,238	7,570	0.5%	4,295	3,275	57%	0.23%
June	1,426,966	23,432	1.6%	14,562	8,870	62%	0.62%
July	1,425,665	15,037	1.1%	7,460	7,577	50%	0.53%
August	1,432,409	13,281	0.9%	6,469	6,812	49%	0.48%
September	1,426,561	16,644	1.2%	8,614	8,030	52%	0.56%
October	1,406,768	10,897	0.8%	6,354	4,543	58%	0.32%
November	1,404,504	17,301	1.2%	10,660	6,641	62%	0.47%
December	1,402,942	60,006	4.3%	33,117	26,889	55%	1.92%
YTD	**1,402,942**	**207,826**	**14.81%**	**115,627**	**92,199**	**56%**	**6.57%**

[1] Excludes count of customers recertified through the probability model.
[2] Recertification results are tied to the month initiated.
[3] Includes customers who did not respond or who requested to be de-enrolled.
[4] Percentage of customers recertified compared to the total participants requested to recertify in that month.
[5] Does not include sub-metered customers.

CARE Table 7 - CARE Capitation Contractors
Pacific Gas and Electric Company
Program Year 2023 Annual Report

Contractor Name [1]	Contractor Type (Check one or more if applicable)				Enrollments [2]			Total Expenditures [3]
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
AAPI		x			0	0	0	$ -
Amador-Tuolumne Community Action Agency		x		x	2	0	2	$ 60
American GI Forum		x			5	16	21	$ 630
Arriba Juntos		x			0	0	0	$ -
Breathe California		x			0	0	0	$ -
Catholic Daisies of Fresno		x			5	6	11	$ 330
Central Coast Energy Services Inc		x		x	2	42	44	$ 1,320
Cesar A Moncada DBA Moncada Outreach		x			0	0	0	$ -
Child Abuse Prevention Council of San Joaquin County		x			0	0	0	$ -
Community Action Marin		x		x	0	0	0	$ -
Community Action Partnership of Madera County		x		x	3	28	31	$ 930
Community Resource Project Inc		x		x	0	357	357	$ 10,710
Eden I & R		x			0	4	4	$ 120
El Puente Comunitario		x			0	0	0	$ -
Human Investment Project Housing Inc (HIP)		x			0	0	0	$ -
Independent Living Center of Kern County Inc		x			1	1	2	$ 60
Interfaith Food Bank & Thrift Store of Amador County		x			0	0	0	$ -
KidsFirst		x			0	0	0	$ -
Kings Community Action Organization Inc		x		x	0	0	0	$ -
Merced County Community Action Agency		x		x	8	4	12	$ 360
Monument Crisis Center		x			0	2	2	$ 60
National Asian American Coalition		x			0	0	0	$ -
National Diversity Coalition (NDC)		x			0	0	0	$ -
North Coast Energy Services, Inc		x			61	33	94	$ 2,820
Resources for Independence Central Valley		x			0	0	0	$ -
Sacred Heart Community Service		x		x	0	29	29	$ 870
UpValley Family Centers		x			0	1	1	$ 30
Valley Clean Air		x			0	0	0	$ -
Welcome Tech	x				0	0	0	$ -
West Valley Community Services		x			0	0	0	$ -
Total Enrollments and Expenditures					**87**	**523**	**610**	**$ 18,300**

[1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.

[2] Enrollments reflect new enrollments only.

[3] Expenditures reflect payments made in 2023 and may not correlate directly with enrollment numbers due to unsubmitted invoices or timing differences.

	A	B	C	D	E	F	G	H
2	**CARE Table 8 - CARE Participants as of Month-End**							
3	**Pacific Gas and Electric Company**							
4	**Program Year 2023 Annual Report**							
5								
6	**2023**	**Gas and Electric**	**Gas Only**	**Electric Only**	**Total**	**Eligible Households**	**Enrollment Rate**	**% Change**
7	**January**	907,960	192,435	374,974	1,475,369	1,402,162	105%	n/a
8	**February**	887,726	192,936	369,903	1,450,565	1,402,162	103%	-1.68%
9	**March**	886,122	193,887	369,784	1,449,793	1,402,162	103%	-0.05%
10	**April**	883,389	195,499	365,632	1,444,520	1,402,162	103%	-0.36%
11	**May**	879,788	196,049	362,401	1,438,238	1,402,162	103%	-0.43%
12	**June**	870,611	196,177	360,178	1,426,966	1,402,162	102%	-0.78%
13	**July**	868,288	196,677	360,700	1,425,665	1,402,162	102%	-0.09%
14	**August**	871,858	197,384	363,167	1,432,409	1,402,162	102%	0.47%
15	**September**	867,065	197,004	362,492	1,426,561	1,402,162	102%	-0.41%
16	**October**	878,199	182,287	346,282	1,406,768	1,402,162	100%	-1.39%
17	**November**	877,058	181,634	345,812	1,404,504	1,402,162	100%	-0.16%
18	**December**	877,073	180,570	345,299	1,402,942	1,402,162	100%	-0.11%

CARE Table 9 - CARE Average Monthly Usage & Bill
Pacific Gas and Electric Company
Program Year 2023 Annual Report

CARE Table 9A - Average Monthly Gas / Electric Usage
Residential Non-CARE vs. CARE Customers [1]

Customer	Gas Therms Tier 1	Gas Therms Tier 2	Total
Non-CARE	21.6	13.6	35.1
CARE	19.4	9.9	29.2

Customer	Electric KWh Tier 1	Electric KWh Tier 2 and Above	Total
Non-CARE	103	306	409
CARE	197	272	469

CARE Table 9B - Average Monthly Gas / Electric Bill [2]
Residential Non-CARE vs. CARE Customers [1]
(Dollars per Customer)

Customer	Gas	Electric [3]
Non-CARE	$78.26	$116.62
CARE	$60.87	$86.83

[1] Excludes master-meter usage.
[2] Reflects 2023 total billed usage revenues divided by the average number of 2023 monthly bills.
[3] Electric includes both bundled and DA/CCA customers. Revenues and associated bills are for services provided by PG&E only, and will be lower for DA/CCA customers because they exclude generation revenues.

CARE Table 10 - CARE Surcharge & Revenue
Pacific Gas and Electric Company
Program Year 2023 Annual Report

CARE Table 10A
CARE Electric Surcharge and Revenue Collected by Customer Class

Customer Class [1] [3]	Average Monthly		CARE Surcharge	Total CARE Surcharge Revenue	Percentage of CARE Surcharge
	CARE Surcharge	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential	$4.84	$118	4.1%	$213,228,290	23.51%
Commercial	$64.73	$884	7.3%	$418,396,812	46.14%
Agricultural	$64.44	$1,312	4.9%	$69,406,758	7.65%
Large/Indust	$15,053.43	$134,058	11.2%	$205,760,882	22.69%

CARE Table 10B
CARE Gas Surcharge and Revenue Collected by Customer Class

	Average Monthly		CARE Surcharge	Total CARE Surcharge Revenue	Percentage of CARE Surcharge
	CARE Surcharge [2]	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential	$1.62	$78	2.07%	$71,277,775	37.74%
Commercial	$14.54	$453	3.21%	$39,272,523	20.38%
Natural Gas Vehicle	$144.58	$3,854	3.75%	$2,112,053	1.12%
Industrial [2]	$10,403.25	$128,726	8.08%	$76,179,150	42.28%

[1] Excludes CARE customers.
[2] Industrial includes both G-NT(D), G-NT(T), G-NT(BB), and GNGV4 and is net of volumes qualifying for G-COG.
[3] Includes both bundled and DA/CCA customers. Revenues and associated bills are for services provided by PG&E only, and will be lower for DA/CCA customers because they exclude generation revenues.

	A	B	C	D	E	F
2	**CARE Table 11 - CARE Capitation Applications [1]**					
3	**Pacific Gas and Electric Company**					
4	**Program Year 2023 Annual Report**					
5						
6	**Entity**	**Total Received**	**Approved [2]**	**Denied**	**Pending/ Never Completed**	**Duplicate**
7	Amador-Tuolumne Community Action Agency	7	2	2	0	3
8	American GI Forum	73	21	7	0	45
9	Catholic Daisies of Fresno	38	11	5	0	22
10	Central Coast Energy Services Inc	152	44	16	0	92
11	Community Action Partnership of Madera County	92	31	37	0	24
12	Community Resource Project Inc	567	357	115	0	95
13	Eden I&R	12	4	0	0	8
14	El Puente Comunitario	1	0	1	0	0
15	Independent Living Center of Kern County Inc	4	2	0	0	2
16	Merced County Community Action Agency	28	12	11	0	5
17	Monument Crisis Center	4	2	1	0	1
18	North Coast Energy Services, Inc	341	94	81	0	166
19	Sacred Heart Community Service	83	29	21	0	33
20	UpValley Family Centers	1	1	0	0	0
21	Valley Clean Air	1	0	1	0	0
22	Welcome Tech	6	0	3	0	3
23	**Total**	**1,410**	**610**	**301**	**0**	**499**
24	[1] Includes sub-metered customers.					
25	[2] Includes new enrollments only.					

CARE Table 12 - CARE Expansion Program
Pacific Gas and Electric Company
Program Year 2023 Annual Report

CARE Table 12A
Participating Facilities by Month

2023	Gas			Electric		
	CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
January	2,956	533	3,489	2,926	993	3,919
February	2,950	533	3,483	2,923	995	3,918
March	2,931	535	3,466	2,954	992	3,946
April	2,868	543	3,411	2,956	1,000	3,956
May	2,968	548	3,516	2,929	1,199	4,128
June	2,883	548	3,431	3,089	1,015	4,104
July	2,866	552	3,418	3,068	1,018	4,086
August	2,891	559	3,450	3,126	1,031	4,157
September	2,891	550	3,441	3,138	1,023	4,161
October	3,019	554	3,573	3,158	1,033	4,191
November	3,026	562	3,588	3,158	1,050	4,208
December	3,028	563	3,591	3,157	1,049	4,206

CARE Table 12B
Average Monthly Gas / Electric Usage [1]

Customer	Gas	Electric
	Therms	KWh
Residential Facilities	45	481
Commercial Facilities	709	8,146

[1] Excludes master meter usage.

CARE Table 12C
CARE Expansion Self-Certification and Self-Recertification Applications

	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	159	148	5	6	0
Percentage		93%	3%	4%	0%

CARE Table 13 - CARE High Usage Verification Results [5]
Pacific Gas and Electric Company
Program Year 2023 Annual Report

	Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation [6]			Stage 3 - Usage Monitoring		
	Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) [1]	Income Verified and Referred to ESA	Failed and Removed [2]	Ineligible [3]	Completed	Removed [4]	Appeals Denied	Appeals Approved
	27,456	16,761	1,225	9,470	0	1,422	621	22	0	0

[1] Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.
[2] Includes customers who declined to participate in ESA Program, failed to respond to appointment requests or missed multiple appointments, or denied access to all rooms.
[3] Includes customers who previously participated in ESA Program, landlord refused, etc. These customers move directly to Stage 3.
[4] Customers removed for exceeding 600% of baseline in any monthly billing cycle, after the 90-day grace period following ESA Participation.
[5] High usage is defined as electric customers with usage above 400% of baseline 3 times in a 12-month period. Results reflect status as of March 27, 2024.
[6] Does not include 7,427 customers still pending ESA participation.

CARE Table 14 - CARE Customer Usage and ESA Program Treatment
Pacific Gas and Electric Company
Program Year 2023 Annual Report

# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV [1]	Percent of those CARE customers Not served by ESA Program [2]	# of Enrollments led to ESA Program measure Installations	# of Long-Term tenancy CARE customers who have Not applied for ESA Program	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment [3]				Energy Usage of CARE customers who do Not accept ESA Program treatment [3]
				Energy Usage before ESA Program treatment	Energy Usage within 3-months of ESA Program treatment	Energy Usage within 6-months of ESA Program treatment	Energy Usage within 12-months of ESA Program treatment	
22,914	66%	7,806	15,108	1,142	1,122	1,140	1,163	1,142

[1] Those CARE customers who have been on the CARE rate at the same meter for at least six years; 90th percentile of usage determined at the customer level after applying tenancy and HU PEV filters
[2] Customers who have not participated in ESA since 2019
[3] Reflects average monthly kWh usage

	A	B
2	**CARE Table 15 - CARE Categorical Enrollment**	
3	**Pacific Gas and Electric Company**	
4	**Program Year 2023 Annual Report**	
5		
6	**Type of Enrollment**	**Number of Customer Enrollments [1]**
7	Bureau of Indian Affairs General Assistance	230
8	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	97,897
9	CalWORKs/Temporary Assistance for Needy Families (TANF) [3]	13,396
10	Head Start Income Eligible - (Tribal Only)	647
11	Healthy Families A&B	70,748
12	Low-income Home Energy Assistance Program (LIHEAP)	25,388
13	Medicaid/Medi-Cal	106,148
14	National School Lunch Program (NSLP) - Free Lunch	22,675
15	Supplemental Security Income (SSI)	37,247
16	Tribal TANF [2]	13,396
17	Women, Infants, and Children Program (WIC)	26,905
18	[1] Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account. Counts include both new enrollments and recertifications.	
19	[2] CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	

	A	B	C	D	E
2	**CARE Table 16 - CARE and Disadvantaged Communities Enrollment Rate for Zip Codes**				
3	**Pacific Gas and Electric Company**				
4	**Program Year 2023 Annual Report**				
5					
6	**Total CARE Households Enrolled**				
7	**Month**	**CARE Enrollment Rate for Zip Codes That Have 10% or More Disconnections [1]**	**CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG) [2]**	**CARE Enrollment Rate for Zip Codes in High Poverty (with 70% or Less CARE Penetration) [2]**	**CARE Enrollment Rate for DAC (Zip/Census Track) Codes in High Poverty (with 70% or Less CARE Enrollment Rate) [2] [3]**
8	January	98%	106%	50%	53%
9	February	94%	104%	50%	50%
10	March	95%	104%	43%	51%
11	April	95%	103%	43%	51%
12	May	93%	102%	43%	51%
13	June	92%	101%	50%	51%
14	July	93%	101%	42%	50%
15	August	93%	102%	39%	49%
16	September	92%	101%	39%	49%
17	October	90%	100%	32%	48%
18	November	90%	100%	44%	59%
19	December	91%	99%	51%	62%
20	[1] Disconnection Rates are based on the previous year. PG&E restarted disconnections in Q4 2022.				
21	[2] Includes zip codes with >25% of customers with incomes less than 100% FPG.				
22	[3] DACs are defined at the census tract level. Corresponding zip codes are provided for the purpose of this table; however, the entire zip code listed may not be considered a DAC.				
23					
24	**Note:**				
25	*Penetration Rate and Enrollment Rate are the same value.				

FERA Table 1 - FERA Overall Program Expenses
Pacific Gas and Electric Company
Program Year 2023 Annual Report

Category	Overall Expenditures			Authorized Budget [1]	% of Budget Spent	Total Shifted [2]	Shifted to/from?
	Electric	Gas	Total				
Marketing, Education, and Outreach	$2,623,703	$0	$2,623,703	$2,623,703	100%	$3,203	Shifted from Processing, Certification, Recertification categories
Processing, Certification, Recertification	$9,997	$0	$9,997	$53,897	19%	($3,203)	Shifted to Outreach category
Post Enrollment Verification	$0	$0	$0	$84,000	0%	$0	
IT Programming	$0	$0	$0	$0	0%	$0	
Pilots	$0	$0	$0	$0	0%	$0	
Measurement & Evaluation	$0	$0	$0	$0	0%	$0	
Regulatory Compliance	$0	$0	$0	$29,500	0%	$0	
General Administration	$52,130	$0	$52,130	$55,300	94%	$0	
CPUC Energy Division	$0	$0	$0	$0	0%	$0	
TOTAL Program Costs	**$2,685,829**	**$0**	**$2,685,829**	**$2,846,400**	**94%**	**($0)**	
FERA Rate Discount [3]	$17,148,000		$17,148,000	$15,727,000	109%	$1,421,000	
Service Establishment Charge Discount	$0	$0	$0	$0	0%	$0	
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS [3]	**$19,833,830**	**$0**	**$19,833,830**	**$18,573,400**	**107%**	**$1,421,000**	

[1] Reflects total authorized funding approved in D.21-06-015, Attachment 1, Table 4.

[2] Reflects fund shift in accordance with the rules set forth in D.21-06-015, which granted the IOUs authority to shift funds between the FERA program categories. The information in the "Total Shifted" and "Shifted to/from?" column is for illustrative purposes only, to disclose how funds from the overall authorized budget can be shifted between categories

[3] Total program administrative expenses did not exceed the overall authorized budget. The FERA discount exceeded the authorized amount by $1,421,000. Per D.21-06-015, PG&E is authorized to recover the full value of the discount through the FERA two-way balancing account on an automatic pass-through basis.

FERA Table 2 - FERA Enrollment, Recertification, Attrition, & Enrollment
Pacific Gas and Electric Company
Program Year 2023 Annual Report

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment		Total FERA Participants by Dwelling Type [6]					
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response [4]	Failed PEV	Failed Recertification	Other [5]	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)	SF	MF	MH	Total FERA Participants	Estimated FERA Eligible	Enrollment Rate % (W/X)
	Inter-Utility [1]	Intra-Utility [2]	Leveraging [3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																		
January	0	20	0	20	875	345	67	0	1,287	1,307	571	187	0	758	n/a	1,144	407	94	1,645	2,065	-338				36,314	163,489	22%
February	0	29	0	29	859	225	78	0	1,162	1,191	315	159	0	474	n/a	546	340	11	897	1,665	294				36,608	163,489	22%
March	0	35	0	35	832	518	65	1	1,416	1,451	435	273	0	708	n/a	159	435	267	861	2,159	590				37,198	163,489	23%
April	0	38	0	38	528	271	47	0	846	884	464	125	0	589	n/a	92	355	436	883	1,473	1				37,199	163,489	23%
May	0	34	0	34	1,035	599	103	0	1,737	1,771	350	128	0	478	n/a	23	722	231	976	2,249	795				37,994	163,489	23%
June	0	23	0	23	769	444	69	0	1,282	1,305	1,350	106	0	1,456	n/a	303	349	360	1,012	2,761	293				38,287	163,489	23%
July	0	24	0	24	740	538	47	0	1,325	1,349	915	138	0	1,053	n/a	266	824	657	1,747	2,402	-398				37,889	163,489	23%
August	0	38	0	38	833	582	40	0	1,455	1,493	1,562	198	0	1,760	n/a	156	747	77	980	3,253	513				38,402	163,489	23%
September	0	21	0	21	728	435	32	1	1,196	1,217	570	116	0	686	n/a	0	496	640	1,136	1,903	81				38,483	163,489	24%
October	0	29	0	29	615	405	26	0	1,046	1,075	617	185	0	802	n/a	63	854	129	1,046	1,877	29				38,512	163,489	24%
November	0	30	0	30	347	187	32	0	566	596	816	85	0	901	n/a	69	605	84	758	1,497	-162				38,350	163,489	23%
December	0	24	0	24	436	208	0	1	645	669	849	111	0	960	n/a	267	654	-197	724	1,629	-55				38,295	163,489	23%
YTD Total	**0**	**345**	**0**	**345**	**8,597**	**4,757**	**606**	**3**	**13,963**	**14,308**	**8,814**	**1,811**	**0**	**10,625**	**0**	**3,088**	**6,788**	**2,789**	**12,665**	**24,933**	**1,643**	**30,656**	**7,639**	**n/a**	**38,295**	**163,489**	**23%**

[1] Enrollments via data sharing between the IOUs.
[2] Enrollments via data sharing between departments and/or programs within the utility.
[3] Enrollments via data sharing with programs outside the IOU that serve low-income customers.
[4] PG&E counts attrition due to no response in the Failed PEV and Failed Recertification columns, respectively.
[5] Includes customers who closed their accounts, requested to be removed, or were otherwise ineligible for the program.
[6] Based on SF and MF structure configuration as noted in PG&E's billing system; does not include sub-metered tenants.

FERA Table 3 - FERA Post-Enrollment Verification Results
Pacific Gas and Electric Company
Program Year 2023 Annual Report

FERA Table 3A
Post-Enrollment Verification Results (Model) 2023

Month	Total FERA Households Enrolled	Households Requested to Verify [1]	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible) [2]	Total Households De-enrolled [3]	% De-enrolled through Post Enrollment Verification [4]	% of Total FERA Households De-enrolled
January	36,314	37	0.10%	30	5	35	95%	0.10%
February	36,608	30	0.08%	24	1	25	83%	0.07%
March	37,198	30	0.08%	22	2	24	80%	0.06%
April	37,199	30	0.08%	23	5	28	93%	0.08%
May	37,994	30	0.08%	25	2	27	90%	0.07%
June	38,287	29	0.08%	20	5	25	86%	0.07%
July	37,889	30	0.08%	19	4	23	77%	0.06%
August	38,402	30	0.08%	22	4	26	87%	0.07%
September	38,483	30	0.08%	28	1	29	97%	0.08%
October	38,512	30	0.08%	25	2	27	90%	0.07%
November	38,350	30	0.08%	21	3	24	80%	0.06%
December	38,295	30	0.08%	24	1	25	83%	0.07%
YTD Total	**38,295**	**366**	**0.96%**	**283**	**35**	**318**	**87%**	**0.83%**

[1] Includes customers selected randomly.
[2] Includes customers verified as over income or who requested to be de-enrolled.
[3] Verification results are tied to the month initiated.
[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.

FERA Table 3B
Post-Enrollment Verification Results (Electric only High Usage) 2023

Month	Total FERA Households Enrolled	Households Requested to Verify [1]	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible) [2]	Total Households De-enrolled [3]	% De-enrolled through Post Enrollment Verification	% of Total FERA Households De-enrolled
January	36,314	218	0.60%	192	13	205	94%	0.56%
February	36,608	65	0.18%	60	4	64	98%	0.17%
March	37,198	55	0.15%	42	6	48	87%	0.13%
April	37,199	308	0.83%	255	16	271	88%	0.73%
May	37,994	303	0.80%	247	19	266	88%	0.70%
June	38,287	147	0.38%	106	10	116	79%	0.30%
July	37,889	84	0.22%	46	4	50	60%	0.13%
August	38,402	41	0.11%	35	2	37	90%	0.10%
September	38,483	44	0.11%	36	4	40	91%	0.10%
October	38,512	303	0.79%	255	12	267	88%	0.69%
November	38,350	193	0.50%	163	5	168	87%	0.44%
December	38,295	85	0.22%	69	6	75	88%	0.20%
YTD Total	**38,295**	**1,846**	**4.82%**	**1,506**	**101**	**1,607**	**87%**	**4.20%**

[1] Includes all participants who were selected for high usage verification process.
[2] Includes customers verified as over income or who requested to be de-enrolled.
[3] Verification results are tied to the month initiated.

	A	B	C	D	E	F	G
2	**FERA Table 4 - FERA Self-Certification and Self-Recertification Applications [1]**						
3	**Pacific Gas and Electric Company**						
4	**Program Year 2023 Annual Report**						
5							
6	**FERA Table 4A** **Self-Certification and Self-Recertification Applications [1]**						
7		**Provided [2]**	**Received**	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**
8	**Total**	**2,569,868**	**22,865**	**21,295**	**1,037**	**533**	**1,811**
9	Percentage [3]		100%	93%	5%	2%	8%
10	[1] Includes sub-metered customers.						
11	[2] Includes number of applications provided via direct mail campaigns, call centers, bill inserts and other outreach methods. Because there are other means by which customers obtain applications which are not counted, this number is only an approximation.						
12	[3] Percentage of Received. Duplicates are also counted as Approved, so the total will not add up to 100%.						
13							
14							
15	**FERA Table 4B** **Post-Enrollment Verification [1]**						
16		**Requested**	**Received**	**Approved**	**Denied**	**Pending/Never Completed**	
17	**Total**	**2,212**	**423**	**287**	**136**	**1,789**	
18							
19	[1] Includes sub-metered customers.						

FERA Table 5 - FERA Enrollment by County
Pacific Gas and Electric Company
Program Year 2023 Annual Report

County	Estimated Eligible			Total Participants			Enrollment Rate		
	Urban	Rural [1]	Total	Urban	Rural	Total	Urban	Rural	Total
ALAMEDA	12,845	0	12,845	3,296	0	3,296	26%	0%	26%
ALPINE	0	11	11	0	0	0	n/a	0%	0%
AMADOR	0	366	366	0	147	147	0%	40%	40%
BUTTE	2,040	987	3,027	470	239	709	23%	24%	23%
CALAVERAS	1	632	633	0	173	173	0%	27%	27%
COLUSA	2	560	561	0	87	87	0%	16%	16%
CONTRA COSTA	11,596	0	11,596	3,425	0	3,425	30%	0%	30%
EL DORADO	953	683	1,636	305	241	546	32%	35%	33%
FRESNO	18,433	31	18,464	4,105	4	4,109	22%	13%	22%
GLENN	0	726	726	0	114	114	0%	16%	16%
HUMBOLDT	0	1,666	1,666	0	411	411	n/a	25%	25%
KERN	4,918	7,980	12,898	1,493	1,025	2,518	30%	13%	20%
KINGS	28	1,846	1,874	3	252	255	11%	14%	14%
LAKE	0	982	982	0	277	277	n/a	28%	28%
LASSEN	0	21	21	0	1	1	n/a	5%	5%
MADERA	2,037	866	2,902	503	164	667	25%	19%	23%
MARIN	2,117	0	2,117	308	0	308	15%	n/a	15%
MARIPOSA	2	250	251	0	58	58	0%	23%	23%
MENDOCINO	1	1,055	1,056	0	229	229	0%	22%	22%
MERCED	2,043	2,208	4,251	490	621	1,111	24%	28%	26%
MONTEREY	7,156	1,062	8,218	914	150	1,064	13%	14%	13%
NAPA	1,854	0	1,854	333	0	333	18%	0%	18%
NEVADA	0	683	684	0	292	292	0%	43%	43%
PLACER	897	1,028	1,925	493	278	771	55%	27%	40%
PLUMAS	4	187	191	0	35	35	0%	19%	18%
SACRAMENTO	67	0	67	11	0	11	17%	n/a	17%
SAN BENITO	27	1,121	1,148	6	308	314	22%	27%	27%
SAN BERNARDINO	0	0	0	0	0	0	n/a	n/a	n/a
SAN FRANCISCO	5,333	0	5,333	935	0	935	18%	n/a	18%
SAN JOAQUIN	11,066	1,021	12,087	3,129	388	3,517	28%	38%	29%
SAN LUIS OBISPO	1,414	1,989	3,403	131	295	426	9%	15%	13%
SAN MATEO	6,219	0	6,219	1,236	0	1,236	20%	n/a	20%
SANTA BARBARA	3,255	154	3,408	247	20	267	8%	13%	8%
SANTA CLARA	14,819	536	15,355	3,691	142	3,833	25%	26%	25%
SANTA CRUZ	2,073	0	2,073	451	0	451	22%	0%	22%
SHASTA	596	660	1,257	183	180	363	31%	27%	29%
SIERRA	0	16	16	0	2	2	0%	13%	12%
SISKIYOU	0	1	1	0	0	0	n/a	0%	0%
SOLANO	5,934	0	5,934	1,964	0	1,964	33%	n/a	33%
SONOMA	4,405	323	4,728	1,185	94	1,279	27%	29%	27%
STANISLAUS	3	766	769	3	367	370	111%	48%	48%
SUTTER	2,577	0	2,577	526	0	526	20%	0%	20%
TEHAMA	1	1,334	1,336	2	274	276	140%	21%	21%
TRINITY	0	61	61	0	0	0	n/a	0%	0%
TULARE	83	1,090	1,173	11	134	145	13%	12%	12%
TUOLUMNE	0	646	646	0	221	221	n/a	34%	34%
YOLO	3,150	0	3,150	779	1	780	25%	483%	25%
YUBA	1,976	19	1,995	433	10	443	22%	53%	22%
Total	**129,923**	**33,566**	**163,489**	**31,061**	**7,234**	**38,295**	**24%**	**22%**	**23%**

[1] Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.

	A	B	C	D	E	F	G	H
2	**FERA Table 6 - FERA Recertification Results**							
3	**Pacific Gas and Electric Company**							
4	**Program Year 2023 Annual Report**							
5								
6	**2023**	**Total FERA Households**	**Households Requested to Recertify [1]**	**% of Households Total (C/B)**	**Households Recertified [2] [5]**	**Households De-enrolled [3]**	**Recertification Rate % [4] (E/C)**	**% of Total Households De-enrolled (F/B)**
7	January	36,314	390	1.1%	35	355	9%	0.98%
8	February	36,608	824	2.3%	102	722	12%	1.97%
9	March	37,198	373	1.0%	24	349	6%	0.94%
10	April	37,199	857	2.3%	33	824	4%	2.22%
11	May	37,994	776	2.0%	29	747	4%	1.97%
12	June	38,287	533	1.4%	37	496	7%	1.30%
13	July	37,889	775	2.0%	85	690	11%	1.82%
14	August	38,402	582	1.5%	78	504	13%	1.31%
15	September	38,483	701	1.8%	47	654	7%	1.70%
16	October	38,512	470	1.2%	26	444	6%	1.15%
17	November	38,350	771	2.0%	79	692	10%	1.80%
18	December	38,295	1,149	3.0%	139	1,010	12%	2.64%
19	**YTD**	**38,295**	**8,201**	**21.42%**	**714**	**7,487**	**9%**	**19.55%**
20	[1] Excludes count of customers recertified through the probability model.							
21	[2] Recertification results are tied to the month initiated.							
22	[3] Includes customers who did not respond or who requested to be de-enrolled.							
23	[4] Percentage of customers recertified compared to the total participants requested to recertify in that month.							

FERA Table 7 - FERA Capitation Contractors
Pacific Gas and Electric Company
Program Year 2023 Annual Report

	A	B	C	D	E	F	G	H	I
6	Contractor Name [1]	Contractor Type (Check one or more if applicable)				Enrollments [2]			Total Expenditures
7		Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
8	AAPI	-	x	-	-	0	0	0	$ -
9	Amador-Tuolumne Community Action Agency	-	x	-	x	0	0	0	$ -
10	American GI Forum	-	x	-	-	0	0	0	$ -
11	Arriba Juntos	-	x	-	-	0	0	0	$ -
12	Breathe California	-	x	-	-	0	0	0	$ -
13	Catholic Daisies of Fresno	-	x	-	-	0	0	0	$ -
14	Central Coast Energy Services Inc	-	x	-	x	0	0	0	$ -
15	Cesar A Moncada DBA Moncada Outreach	-	x	-	-	0	0	0	$ -
16	Child Abuse Prevention Council of San Joaquin County	-	x	-	-	0	0	0	$ -
17	Community Action Marin	-	x	-	x	0	0	0	$ -
18	Community Action Partnership of Madera County	-	x	-	x	0	0	0	$ -
19	Community Resource Project Inc	-	x	-	x	0	0	0	$ -
20	Eden I & R	-	x	-	-	0	0	0	$ -
21	El Puente Comunitario	-	x	-	-	0	0	0	$ -
22	Human Investment Project Housing Inc (HIP)	-	x	-	-	0	0	0	$ -
23	Independent Living Center of Kern County Inc	-	x	-	-	0	0	0	$ -
24	Interfaith Food Bank & Thrift Store of Amador County	-	x	-	-	0	0	0	$ -
25	KidsFirst	-	x	-	-	0	0	0	$ -
26	Kings Community Action Organization Inc	-	x	-	x	0	0	0	$ -
27	Merced County Community Action Agency	-	x	-	x	0	0	0	$ -
28	Monument Crisis Center	-	x	-	-	0	0	0	$ -
29	National Asian American Coalition	-	x	-	-	0	0	0	$ -
30	National Diversity Coalition (NDC)	-	x	-	-	0	0	0	$ -
31	North Coast Energy Services, Inc	-	x	-	-	0	3	3	$ 90
32	Resources for Independence Central Valley	-	x	-	-	0	0	0	$ -
33	Sacred Heart Community Service	-	x	-	x	0	0	0	$ -
34	UpValley Family Centers	-	x	-	-	0	0	0	$ -
35	Valley Clean Air	-	x	-	-	0	0	0	$ -
36	Welcome Tech	x		-	-	0	0	0	$ -
37	West Valley Community Services	-	x	-	-	0	0	0	$ -
38	**Total Enrollments and Expenditures**					**0**	**3**	**3**	**$ 90**

39 [1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.

40 [2] Enrollments reflect new enrollments only.

	A	B	C	D
2	**FERA Table 8 - FERA Average Monthly Usage & Bill**			
3	**Pacific Gas and Electric Company**			
4	**Program Year 2023 Annual Report**			
5				
6	**FERA Table 8A - Average Monthly Electric Usage Residential Non-FERA vs. FERA Customers**			
7	**Customer**	**Electric KWh**	**Electric KWh**	**Total**
8		**Tier 1**	**Tier 2 and Above**	
9	Non-FERA	127	297	423
10	FERA	191	368	559
11				
12				
13	**FERA Table 8B - Average Monthly Electric Bill Residential Non-FERA vs. FERA Customers [1] (Dollars per Customer)**			
14	**Customer**	**Electric**		
15	Non-FERA	$108.81		
16	FERA	$139.47		
17	[1] Excludes master-meter usage.			

8. Appendix B: PG&E's 2023 ESA Marketing Materials

Pacific Gas and Electric Company | Program Year 2023
Appendix B: ESA Marketing Materials
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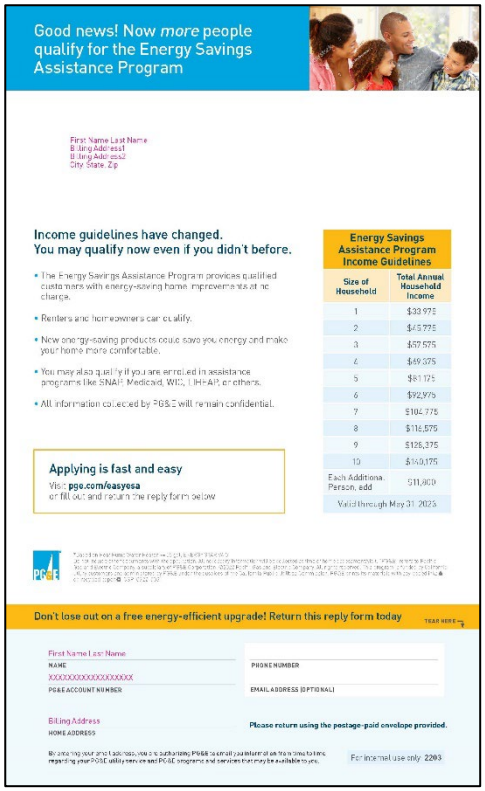
2023 PG&E's Direct Mail Example



Good news! Now *more* people qualify for the Energy Savings Assistance Program

First Name Last Name
Billing Address1
Billing Address2
City State Zip

Income guidelines have changed. You may qualify now even if you didn't before.

- The Energy Savings Assistance Program provides qualified customers with energy-saving home improvements at no charge.
- Renters and homeowners can qualify.
- New energy-saving products could save you energy and make your home more comfortable.
- You may also qualify if you are enrolled in assistance programs like SNAP, Medicaid, WIC, LIHEAP, or others.
- All information collected by PG&E will remain confidential.

Energy Savings Assistance Program Income Guidelines

Size of Household	Total Annual Household Income
1	$33,975
2	$45,775
3	$57,575
4	$69,375
5	$81,175
6	$92,975
7	$104,775
8	$116,575
9	$128,375
10	$140,175
Each Additional Person, add	$11,800

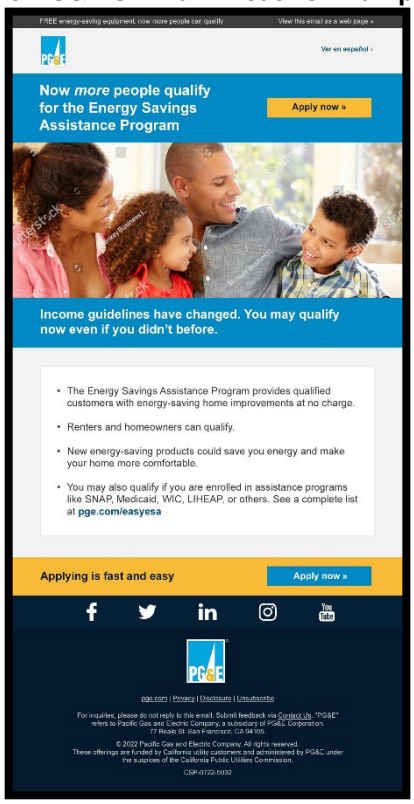
Valid through May 31, 2023

Applying is fast and easy
Visit **pge.com/easyesa**
or fill out and return the reply form below

Don't lose out on a free energy-efficient upgrade! Return this reply form today

First Name Last Name
NAME
XXXXXXXXXXXXXXXX
PG&E ACCOUNT NUMBER
PHONE NUMBER
EMAIL ADDRESS (OPTIONAL)
Billing Address
HOME ADDRESS
Please return using the postage-paid envelope provided.
For internal use only: 2203

2023 PG&E's Email Creative Example



FREE energy-saving equipment, now more people can qualify. View this email as a web page >

Ver en español >

Now *more* people qualify for the Energy Savings Assistance Program

Apply now »

Income guidelines have changed. You may qualify now even if you didn't before.

- The Energy Savings Assistance Program provides qualified customers with energy-saving home improvements at no charge.
- Renters and homeowners can qualify.
- New energy-saving products could save you energy and make your home more comfortable.
- You may also qualify if you are enrolled in assistance programs like SNAP, Medicaid, WIC, LIHEAP, or others. See a complete list at **pge.com/easyesa**

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CSP-0722-0032

2023 PG&E's Bill Insert Example

Now *more* people qualify for the Energy Savings Assistance Program

- The Energy Savings Assistance Program provides qualified customers with energy-saving home improvements at no charge.
- Renters and homeowners can qualify.
- Income guidelines have changed. You may qualify now even if you didn't before. See new guidelines at **pge.com/easyesa**
- New energy-saving products could save you energy and make your home more comfortable.
- You may also qualify if you are enrolled in assistance programs like SNAP, Medicaid, WIC, LIHEAP, or others. See a complete list at **pge.com/easyesa**

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Pacific Gas and Electric Company | Program Year 2023
Appendix B: ESA Marketing Materials
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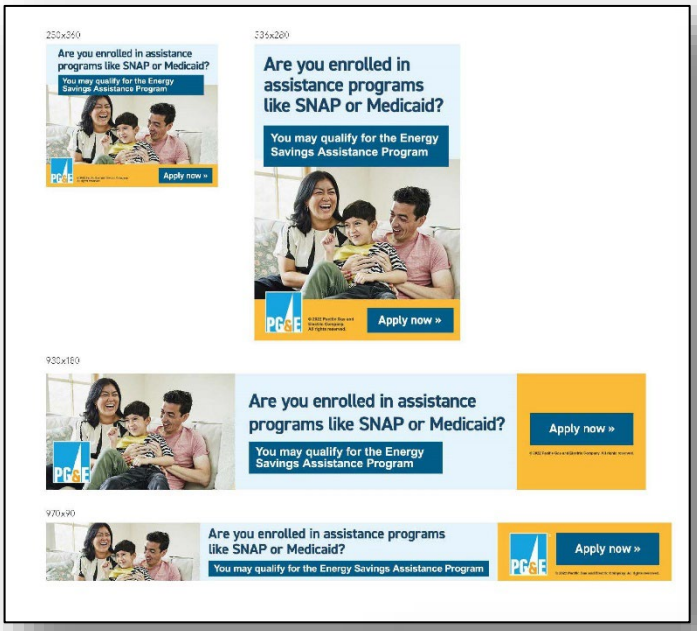
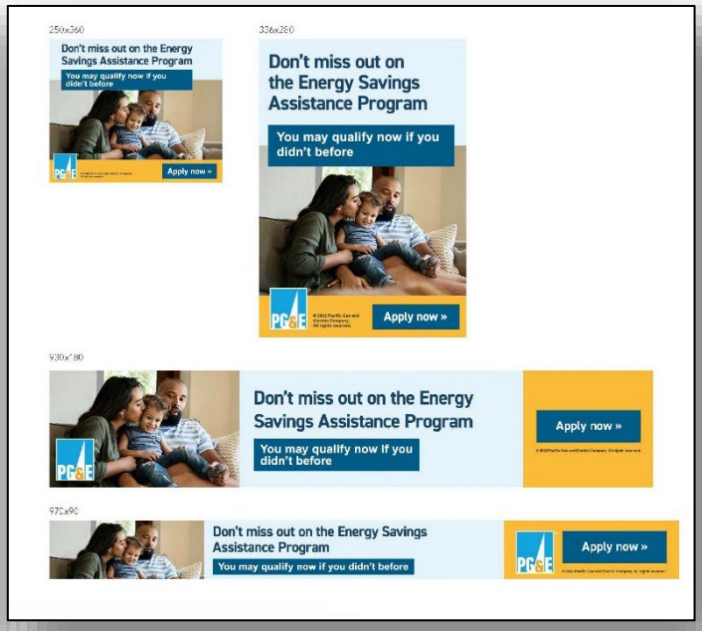
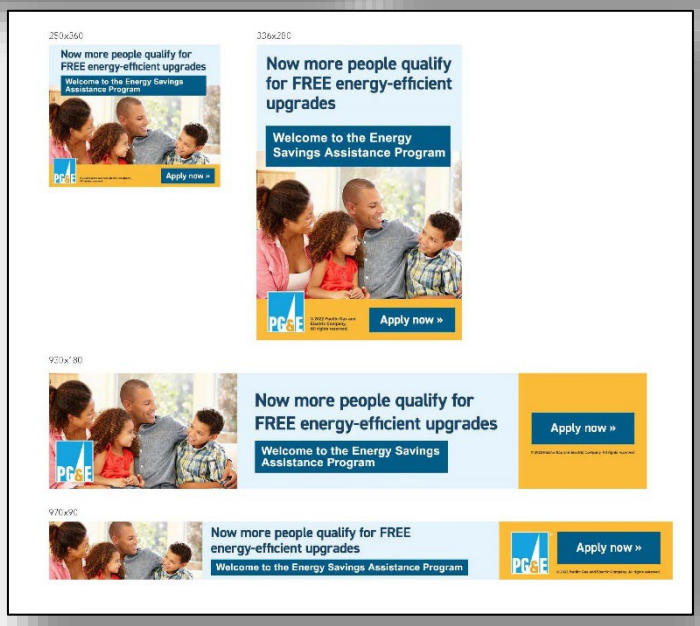
2023 PG&E's Digital Media Examples







9. Appendix C: PG&E's 2023 Energy-Water Coordination Program Report

PG&E Water-Energy Coordination Program

2023 Annual Report

Water Coordination Program

Connect. Collaborate. Conserve.

EQUITY COMMUNITY WATER CONSERVATION

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1. EXECUTIVE SUMMARY

In 2023, the Pacific Gas and Electric Company's (PG&E) Water-Energy Coordination Program (WCP) completed a fifth full year of production. The program, offered in collaboration with water agencies and delivered in conjunction with PG&E's Energy Savings Assistance (ESA) Program, provides water conservation assessments and measures to ESA customers in individual water agency territories. Each water agency contract is customized to meet specific agency budgets and water conservation goals. Richard Heath & Associates, Inc. (RHA) administers the program on behalf of PG&E.

Program services include:

- Evaluating toilets for retrofit qualification and leaks
- Replacing eligible toilets
- Replacing leaking flappers
- Replacing bathroom and kitchen faucets
- Conducting outdoor water use assessments
- Performing meter checks
- Isolating leaks
- Replacing outdoor hose bibs
- Replacing sprinkler heads
- Providing water conservation education
- Delivering water conservation items such as hose nozzles, shower timers and water agency program literature

During the 2023 program year, the WCP experienced some specific challenges that directly impacted contract expansion and production growth.

- Water agencies were still dealing with customer bill delinquencies and budgetary shortages that affected their revenue and discretionary dollars for conservation programs. RHA continued to provide water agencies with information on other funding sources to overcome funding barriers.

- With the entire toilet retrofit budget expended in early August, Valley Water's WCP pilot programs reached a stopping point in production.

- The California American Water WCP continued to experience low production due to limited remaining funding. As previously reported, all of California American Water's larger service districts consumed their allocated budgets due to a higher-than-expected level of production in the first three quarters of the contract term.

Despite facing the obstacles listed below, the WCP maintained a similar level of production as the previous program year, serving more than 500 households.

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WATER AGENCY PARTNERS

Listed below are the four water agency partners in ESA regions implemented by RHA in 2023:

1. California American Water
2. City of Sacramento
3. Solano County Water Agency
4. Valley Water

In 2023, three water agencies participated in WCPs outside of ESA regions implemented by RHA:

1. Alameda County Water District
2. City of Fresno
3. East Bay Municipal Utility District

These service areas covered the following ten counties: Alameda, Contra Costa, Madera, Merced, Monterey, Sacramento, Santa Clara, Santa Cruz, Solano and Sonoma.

SUCCESSES AND LESSONS LEARNED

Program achievements included:

1. **516 homes received WCP measures:**
   Collectively, these measures will achieve approximately 11,164,314 gallons of annual water savings and 12,117 kWh of embedded energy savings. In comparison, the WCP served a slightly lower number (507) of homes in 2022.

2. **The program continued to achieve high customer satisfaction rates.**
   100 percent of customers surveyed through telephone quality assurance calls were very satisfied with program services.

LESSONS LEARNED INCLUDED:

1. **Due to several factors, including funding, agency priorities and requirements, contracting with water partners continued to be challenging.**
   Part of RHA's role as the WCP administrator is to develop relationships with water agencies and establish collaborative water programs. Due to the different water agency types encountered (municipal water retailers, water wholesalers, wastewater agencies and water IOUs), developing programs and executing contracts was often complex and protracted. Some contracts required multiple layers of review and ultimately could not be launched until a supervising board or council approved. The cycle time varied from a few months to as much as an entire year due to water agency staffing shortages, budget reductions and prioritization of other drought-related projects. In many cases, prospective partners must overcome concerns regarding sole sourcing for large-budget programs, identify and obtain program funding, and meet prevailing wage

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criteria for publicly funded agencies. RHA provided water agencies with information on solutions that have worked for other agencies to overcome barriers to program execution.

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2. **ESA subcontractor recruitment continued to be a challenge due to public works project requirements.**
   Most municipal or public water agencies require installation work to be performed at a prevailing wage rate by public works contractors registered with the California Department of Industrial Relations (DIR). This can present a challenge to onboard WCP contractors in certain PG&E regions, particularly where the current pool of ESA subcontractors is not registered with DIR and/or is not interested in pursuing registration as a public works contractor. When this occurs, a participating ESA contractor can perform WCP enrollment and assessments; however, RHA has to engage a separate public works contractor to complete toilet retrofits and other installation work.

WATER LEVERAGING CONTRACT ACTIVITIES

As described in the 2022-2023 Contract Work Authorization (CWA), RHA is expected to outreach to water agencies in its awarded implementation region(s) and to educate water agencies about PG&E's Water-Energy Coordination Program. RHA is expected to develop a unique Water-Energy Coordination Program for each interested water agency. RHA is expected to carry out the following activities with the purpose of engaging water agencies to participate in PG&E's Water-Energy Coordination Program:

No.	Required Activities for Water Leveraging	Activities Conducted in 2023
1.	Network with water agencies and build working relationships including but not limited to cold-calling and attending water conservation conferences.	• In April 2023, RHA conducted n outreach campaign to 14 water agencies in the Central Coast and Northern regions. • In November 2023, RHA conducted an outreach campaign to 14 water agencies in the Central Coast and Northern regions.
2.	Encourage water agency participation in PG&E's Water-Energy Coordination Program.	• During RHA's two outreach campaigns and 2023 Water Forum follow-up activities, water agencies were educated on the benefits of participating in the Water-Energy Coordination Program

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No.	Required Activities for Water Leveraging	Activities Conducted in 2023
3.	Create custom PG&E Water-Energy Coordination Program proposals for water agencies.	• In May of 2023, RHA submitted an unsolicited proposal to East Bay Municipal District for a direct installation pilot program. • In June of 2023, RHA submitted an unsolicited proposal to California American Water for a multifamily/mobile home direct installation pilot program. • In August 2023, RHA submitted a proposal in response to a bid solicitation from Regional Water Authority for a direct installation program. • In September of 2022, RHA submitted an unsolicited proposal to the City of Sacramento for a direct installation pilot program.
4.	Execute PG&E Water-Energy Coordination Program contracts with water agencies and participating ESA subcontractors.	New contracts executed in 2023: • California American Water – Multifamily Pilot (third quarter) • City of Sacramento (fourth quarter) • East Bay Municipal Utility Department (fourth quarter) Contract(s) renewed in the 2023: • Solano County Water Agency (third quarter) • Alameda County Water District (third quarter) Contract(s) extended in 2023: • Valley Water (first quarter)
5.	Recruit ESA subcontractors in water agency territory to work on PG&E's Water-Energy Coordination Program. Recruit installation contractors as needed if ESA subcontractors are not able to perform the installation work. ESA subcontractors are expected to, at minimum, perform the assessment of customer eligibility and water measure feasibility.	Current Water-Energy Coordination Program Subcontractors: • Bright Ideas Construction • Community Outreach Services • Empire Specialties • Quality Conservation Services

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No.	Required Activities for Water Leveraging	Activities Conducted in 2023
6.	Train ESA and installation subcontractors on water agencies' measure offerings and installation protocols.	RHA conducted contractor trainings for the following new contracts: • California American Water – Multifamily Pilot (third quarter) • City of Sacramento (fourth quarter) • East Bay Municipal Utility Department (fourth quarter)
7.	Provide, at a minimum, a monthly update to ESA Program Manager on PG&E Water-Energy Coordination Program progress and challenges which shall include a discussion of new contracts executed with water agencies, contracts renewed with water agencies, number of customers served by each program or pilot program and number of water measures installed.	RHA conducted monthly update meetings with the PG&E ESA Program Manager on the following dates: • 1/6/2023 • 2/3/2023 • 3/3/2023 • 4/7/2023 • 5/5/2023 • 6/2/2023 • 7/7/2023 • 8/7/2023 • 9/11/2023 • 10/6/2023 • 11/8/2023 • 12/1/2023
8.	The Implementer shall provide three quarterly reports within 20 business days following the end of each Q1-Q1. The Implementer shall provide an annual report 1 month after the end of Q4. The report shall summarize quarterly or annual program highlights, accomplishments, challenges, number of customers served, measures offered, quantities installed and annual water and embedded energy savings.	Quarterly reports were provided on the following dates: • 5/1/2023 • 7/21/2023 • 11/3/2023 A 2023 annual report was provided on 2/2/2024.
9.	On an annual basis in the fourth quarter of the year the Implementer or their designee shall host a public Annual Forum for water agencies on PG&E's Water-Energy Coordination Program.	In partnership with PG&E's ESA Program Manager, RHA hosted the 2023 Water Forum on December 14, 2023.
10.	On an annual basis Implementer shall conduct telephone or web surveys of ten percent of customers to ensure the ESA subcontractor performance meets Water Energy Coordination program quality standards.	RHA conducted telephone quality assurance surveys at the end of each quarter to ensure the ESA subcontractor performance meets Water Energy Coordination program quality standards.
11.	Implementer shall recruit at least one water agency per region per year to participate in PG&E's Water-Energy Coordination Program agency program partnership per region annually.	In 2023, RHA successfully recruited the City of Sacramento in the Northern region and signed a contract extension with Valley Water in the Central Coast region.

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No.	Required Activities for Water Leveraging	Activities Conducted in 2023
12.	Implementer's contractual relationship with the water agencies for purposes of participation in PG&E's Water-Energy Coordination Program throughout Implementer's applicable region, shall be funded by PG&E (as part of implementer fee) that shall include Implementer's outreach to water agencies, creation of proposals, ensuring contracts are executed and regular updates and reports to PG&E on Water-Energy Coordination Program activities in accordance with the administration and reporting requirements set forth in this scope of work. Unless otherwise expressly provided, if Implementer no longer provides Work under this Contract that requires contractual relationships be maintained with water agencies for participation in PG&E's Water Energy Coordination Program, Implementer will not be compensated for such related work or maintain such water agency contracts. Implementer may elect for its own purposes to continue any existing or future water agency contractual relationship, regardless of Implementer providing ESA services within such water agency's region.	Water leveraging activities that occurred in the Central Coast and Northern ESA regions were invoiced according to the water leveraging agreement.
13.	Implementer has informed PG&E it will maintain its contractual relationships with water agencies in regions where Implementer will no longer provide ESA services. Implementer agrees to provide PG&E with a list of the existing and new water agencies contracts it will maintain, the services Implementer will offer and perform for these water agencies, the number of customers Implementer will serve by providing its services involving the quantities and types of measures installed, and the end date for each water agencies contract. Implementer will report on these items on a quarterly basis. Management of the Implementer's contracts executed with water agencies and ESA subcontractors performing work for PG&E's Water-Energy Coordination Program is Implementer's responsibility. It is up to the Implementer to negotiate a compensation model with the water agencies that will cover any administrative expenses post Water-Energy Coordination Program contract execution. PG&E funding (as part of implementer fee) shall only be used to outreach to water agencies, create proposals, ensure contracts are executed and provide regular updates and reports to PG&E on Water-Energy Coordination Program activities. PG&E will not be involved in processing payments to ESA subcontractors for work performed under the Water-Energy Coordination Program.	On a monthly and quarterly basis, RHA conducted the following activities in 2023 to comply with this requirement: • Provided regular updates of existing and new water agencies contracts aintained, services offered • Provided reporting on the number of customers served, quantities and types of measures installed, and the contract dates Additionally, all contracts in ESA regions where RHA is not the implementer: • Contracts negotiatied with water agencies included a compensation model to cover RHA administrative expenses • No PG&E funding was used to perform outreach to water agencies, create proposals, ensure contracts are executed and provide regular updates and reports to PG&E on Water-Energy Coordination Program activities.

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2. BACKGROUND

HOW THE WCP STARTED

In conjunction with work on the Water-Energy Nexus, the CPUC directed investor-owned energy utilities to establish partnership frameworks with the water sector to co-fund programs that reduce energy consumption by the water sector in supplying, conveying, treating and distributing water. In 2016, PG&E developed a plan to meet the CPUC requirement by leveraging its ESA program to deliver water conservation services co-funded by water agencies.

In 2016 and 2017, PG&E worked with two water agencies to conduct a test program that delivered water conservation offerings to PG&E ESA customers during ESA appointments (water conservation assessments, education and measures). For PG&E, the program proved that incremental energy conservation could be achieved through the embedded energy savings of water conservation. The program also proved successful for water agencies by enabling them to leverage PG&E's existing visits to offer water conservation measures.

LAUNCHING A FULL-SCALE PROGRAM

After the success of the test program, PG&E developed the full-scale program in 2018. As part of the planning and collaboration efforts, RHA hosted a webinar for PG&E and water agencies to discuss program details. Key discussion topics included:

- Best practices and lessons learned from the test program
- How PG&E and water agencies could best work together
- Available funding for low-income programs
- Existing water conservation rebate programs
- Labor laws and potential impacts on the WCP
- Program measures and associated savings
- Number of potentially eligible homes to be served

Following the webinar, program stakeholders collaborated to identify solutions to potential problems, finalized details and developed a detailed plan for a full-scale program launch. The fully-scaled program officially launched in August 2018.

3. WATER AGENCY CONTRACTS

All WCP contracts are fully customized for each water agency to deliver services and measures that align with their conservation goals. Summaries of current WCP contracts located in ESA regions implemented by RHA are provided below in Table 1. Summaries of WCP partnerships in all other ESA regions are provided in Table 2.

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Table 1. WCP Contracts in PG&E ESA Regions Implemented by RHA

Contract Description	California American Water – Single Family	California American Water – Multifamily and Mobile Home	City of Sacramento	Solano County Water Agency	Valley Water
Estimated Number of ESA Homes to be Served	1,000	345	67	300	400 (leak assessment) 95 (toilet retrofit)
Contract Amount	$500,000	200,000	$50,000	$75,000	$100,000
Contract Period	8/16/2021 – 12/31/2023	7/24/2023 – 3/31/2025	12/6/2023 – 5/30/2024	7/14/2023 – 6/30/2024	7/1/2022 – 12/31/2023
Territory to be Served	Five districts in Merced, Monterey, Oakhurst, Sacramento and Santa Rosa	Four service districts: Dunnigan, Fruitridge, Hillview and Meadowbrook	City of Sacramento	Solano County	Santa Clara County
Organization Type	Investor-Owned Utility	Investor-Owned Utility	Municipal Utility	Wholesaler	Wholesaler
Program Type	Full-Scale Direct Install Program	Leak Assessment and Toilet Retrofit Pilot	Toilet Retrofit Pilot	Full-Scale Direct Install Program	Leak Assessment and Toilet Retrofit Pilot Programs
Number of Assigned ESA Contractors	2	1	1	2	1

Table 2. WCP Contracts in All Other PG&E ESA Regions

Contract Description	Alameda County Water District	City of Fresno	East Bay Municipal Utility District
Estimated Number of ESA Homes to be Served	215	250	520
Contract Amount	$200,000	$158,000	$400,,000
Contract Period	10/3/2023 – 9/30/2024	3/1/2023 – 8/31/2023	11/6/2023 – 10/30/2024
Territory to be Served	Cities of Fremont, Newark and Union City	City of Fresno	Alameda and Contra Costa Counties
Organization Type	Retailer	Retailer	Retailer
Program Type	Full-Scale Direct Install Program	Full-Scale Direct Install Program	Leak Assessment and Toilet Retrofit Pilot
Number of Assigned ESA Contractors	2	1	2

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Table 3. Summary of Measures Offered in Current Programs

Program Measures Offered	Alameda County Water District	California American Water – Single-Family	California American Water – Multifamily	City of Fresno	City of Sacramento	East Bay Municipal Utility District	Solano County Water Agency	Valley Water
Toilet Dye Tab Test & Toilet Retrofit Assessment	X	X	X	X	X	X	X	X
Toilet Retrofit Assessment	X	X	X	X	X	X	X	X
Basic Outdoor Assessment / Meter Check / Leak Location - Observe all water structures, hose bibs and yard for leaking issues	X	X						X
Water Conservation Education	X		X	X		X		X
High-Efficiency Toilet Installation	X	X	X	X	X	X	X	X
Shower Timer		X	X					
Hose Nozzle		X						
Distribution of Water Agency Information / Materials	X	X	X	X				X
Flange Repair	X	X	X	X	X	X	X	X
Angle Stop Replacement	X	X	X	X	X	X	X	X
Flapper Replacement	X	X	X	X		X	X	X
Bathroom Faucet Replacement	X							X
Kitchen Faucet Replacement	X							X
Outdoor Hose Bib Replacement	X							X
Water Heater Temperature Pressure Relief Valve Replacement						X		

NOTE: The 2023 goal for homes served for each water partner agency was determined using the number of anticipated customers served from each contract. Some contracts carried over from 2021 and were renewed in 2022 or 2023 with a change to the number of anticipated customers served. This explains the variance in the estimated number of customers served for the current contract period and the 2023 goal for homes served.

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WATER COORDINATION PROGRAMS IN ESA REGIONS IMPLEMENTED BY RHA

CALIFORNIA AMERICAN WATER – SINGLE FAMILY

California American Water's single-family WCP launched the first week of October 2021 and concluded on December 31, 2023. Due to the program's popularity among California American Water's rate-payer assistance customers, most of the WCP budget was consumed by the third quarter of 2022. Program services included toilet assessments, toilet retrofits, flange and angle stop replacements and flapper installation. Additionally, outdoor leak assessments, meter checks and giveaway items were provided for each participating customer. Collectively, this program served five of California American Water's districts in PG&E territory: Oakhurst, Merced, Monterey, Sacramento and Santa Rosa.

CALIFORNIA AMERICAN WATER – MULTIFAMILY

California American Water's Multifamily WCP pilot launched in late August. The pilot is focused on serving customers that are typically master metered for water service, including residents of multifamily facilities and mobile home park communities. California American Water selected four of their newly acquired service territories (Dunnigan, Fruitridge, Hillview, Meadowbrook) as the territories that will be served through this program.

CITY OF SACRAMENTO

The City of Sacramento contracted with RHA in late December 2023 to deliver a pilot program focused on toilet retrofits. The pilot is slated for a six-month schedule and will serve approximately 67 low-income households.

SOLANO COUNTY WATER AGENCY

Solano County renewed their WCP contract in July 2023. Due to increased demand and past program performance, the water wholesaler is considering adding additional leak assessment and repair services in the next fiscal year. This program focuses on toilet retrofits for customers located in urban and disadvantaged areas throughout Solano County.

VALLEY WATER

The Valley Water Toilet Assessment & Retrofit and Leak Assessment and Repair pilot programs launched at the beginning of 2023. In addition to toilet retrofits, these pilots provide a wide range of leak assessment and repair services for bathroom and kitchen faucets, hose bibs and sprinkler heads. Due to the incredible demand in Santa Clara County, funding for toilet retrofits had already been consumed by the third quarter of 2023, causing work on the program to end ahead of schedule.

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PROGRAMS OUTSIDE OF ESA REGIONS IMPLEMENTED BY RHA

ALAMEDA COUNTY WATER DISTRICT

The fourth quarter of 2023 was the first quarter of Alameda County Water District's third program year. The full-scale program had two primary goals: offer more low-income customers water-saving measures to help reduce their water bills and conserve water for the district. Immediately after the previous contract expired, the current iteration of their full-scale program launched in October 2023. The program continues to provide leak assessment and repair measures, including bathroom and kitchen faucet replacements, hose bib and sprinkler head replacements, and toilet retrofits.

CITY OF FRESNO

On December 2, 2022, RHA executed a contract with the City of Fresno to implement a hybrid WCP pilot, providing enrollment and qualification, toilet dye tabs and retrofit assessments, customer program education and giveaways, and the installation of high-efficiency toilets for both ESA-qualified customers and city residents that participate in the city's rate-payer assistance program. The term of this contract was six months and began on March 1, 2023, when the City provided RHA with a notice to proceed. With the program budget fully consumed, work was completed on this pilot on July 12, 2023.

EAST BAY MUNICIPAL UTILITY DISTRICT

In the fourth quarter of 2023, East Bay Municipal Utility District signed a contract with RHA to deliver a 12-month WCP pilot to their customers participating in their rate-payer assistance program. With a goal of providing service to 520 households, the pilot offers toilet assessments, ultra-efficient toilet retrofits and specific leak assessment and repair measures, including outdoor hose bib and water heater temperature pressure relief valve replacements.

4. BUDGET

Table 4 and Table 5 provide month-to-month details on water leveraging budget and consumption. The strategy for 2023 was to front-load water agency outreach, proposals and contract negotiations in the first half of the year. This approach was used in 2022 and proved to be especially helpful when working with municipal water agencies, many of whom operate on a July – June fiscal year, making first- and second-quarter engagement critical.

Table 4. 2022-2023 Water Leveraging Budget

Month	Billed to PG&E	Contract Balance
October 2022	$2,706.49	$44,638.37
November 2022	$6,567.12	$38,071.25
December 2022	$4,986.38	$33,084.87
January 2023	$4,449.84	$28,635.03
February 2023	$4,150.56	$24,484.47
March 2023	$3,449.61	$21,034.86

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Month	Billed to PG&E	Contract Balance
April 2023	$3,959.41	$17,075.45
May 2023	$3,986.48	$13,088.97
June 2023	$3,585.96	$9,503.01
July 2023	$3,873.26	$5,629.75
August 2023	$4,588.66	$529.98

Table 5. September - December 2023 Water Leveraging Budget

Month	Billed to PG&E	Contract Balance
September 2023	$4,312.19	$12,354.81
October 2023	$4,284.29	$8,070.52
November 2023	$4,243.27	$3,827.05
December 2023	$3,809.28	$17.77

5. PRODUCTION

HOMES SERVED

In 2023, services funded by the six water agency partners were delivered to 749 homes. As stated above, 516 of these homes were served in ESA regions implemented by RHA. A summary of homes served by agency is illustrated in Table 6.

Table 6. Homes Served by Agency in 2023

Water Agency Partner	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Alameda County Water District*	19	6	2	2	2	2	0	0	2	4	0	0	39
California American Water – Single-Family	3	12	5	10	5	0	0	0	0	0	0	12	47
California American Water – Multifamily	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0	0	0	0	0	0
City of Fresno*	0	0	0	72	64	44	5	N/A	N/A	N/A	N/A	N/A	185
Solano County Water Agency	15	17	37	41	24	17	5	24	26	18	13	17	254
Valley Water	2	13	58	53	38	40	13	5	N/A	N/A	N/A	N/A	222
Grand Total	**39**	**48**	**103**	**178**	**133**	**103**	**23**	**30**	**28**	**22**	**13**	**29**	**749**

** WCP in ESA region not implemented by RHA.*

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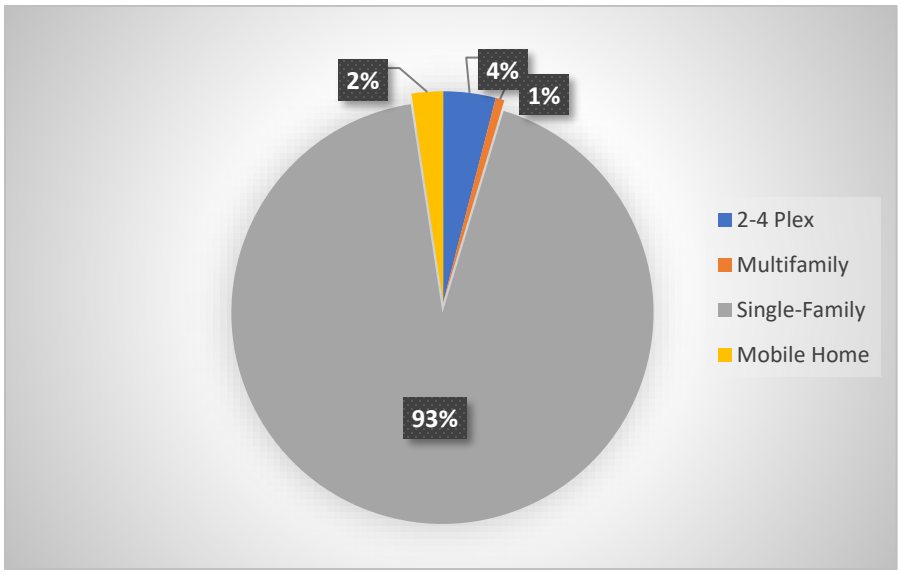
HOME TYPE

Four different types of homes were served by WCP contractors in 2023, as shown below in **Error! Reference source not found.** and Figure 1.

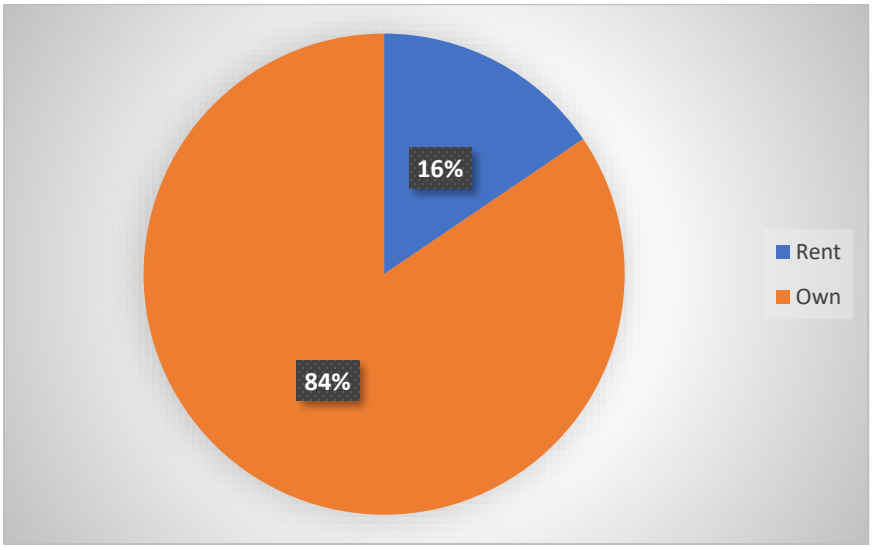
Figure 1. Homes Served by Type in 2023



RENTER VS. OWNER

Figure 2 below shows the percentages of renter-occupied versus owner-occupied homes served in 2023.

Figure 2. Renters Vs. Owners in 2023



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MEASURES DELIVERED

A summary of WCP measures delivered in 2023 is provided below in Table 7.

Table 7. WCP Measures Served by Agency in 2023

Measures Served	Alameda County Water District*	California American Water	City of Fresno*	Solano County Water Agency	Valley Water
Toilet Dye Test / Assessment	86	95	348	464	438
Toilet Retrofits	56	49	250	147	103
Basic Outdoor Assessment + Meter Check + Leak Location	N/A	45	N/A	N/A	N/A
Leak Assessment + Meter Check + Turf Assessment	40	N/A	N/A	N/A	N/A
Leak Assessment + Meter Check	N/A	N/A	N/A	N/A	215
Angle Stop Replacement	13	0	41	0	15
Flange Repair	2	7	20	0	5
Flapper Replacement	1	1	1	1	0
Giveaway Items	N/A	42	178	N/A	N/A
Outdoor Hose Bib	18	N/A	N/A	N/A	45
Bathroom Faucet Replacement	8	N/A	N/A	N/A	66
Kitchen Faucet Replacement	2	N/A	N/A	N/A	20
Sprinkler Head Replacement	1	N/A	N/A	N/A	0
Agency Literature + Water Education	39	N/A	N/A	N/A	213
Totals	**269**	**239**	**838**	**613**	**1,122**

**WCP in ESA region not implemented by RHA.*

6. QUALITY CONTROL

RHA performed two primary quality control activities to ensure positive customer experiences:

Telephone Quality Assurance Calls: A minimum of 5% of customers served were contacted to inquire about their experience after receiving toilet retrofit services. Customers were asked questions about the contractor representative who provided the service and their professionalism, satisfaction with installed

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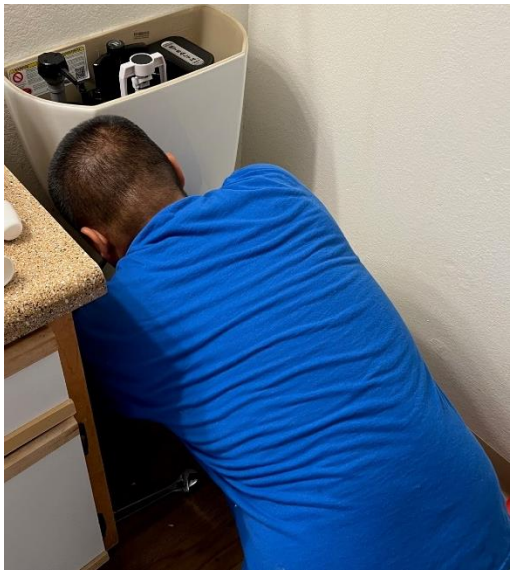
measures and overall satisfaction with the program. In 2023, 18 customers received quality assurance calls. 100 percent of customers surveyed were satisfied with the program.

Installation Photo Review: Contractors serving the WCP are required to take careful "before" photos prior to toilet removal. They must show the date stamp and gallons per flush in the photo and the surrounding subfloor to ensure the toilet qualifies for a program retrofit. Once the new toilet is installed, an "after" photo is taken that will demonstrate installation standards were met. RHA's program management team reviews all photos before approval for contractor reimbursement.

Contractor ride-alongs are generally a standard part of the WCP quality control process. In the third quarter of 2023, RHA program management completed ride-alongs with ESA contractors serving the Solano County WCP.

Figure 3. 2023 Contractor Ride-Along



7. SAVINGS

The WCP achieved excellent water and embedded energy savings in 2023. Calculated savings can be seen below in Table 8.

Table 8. 2023 Calculated Water and Energy Savings in ESA Regions not Implemented by RHA – 1.6 GPF Toilet Retrofits

Measure	WEN Calculator - Water Savings in (gallons/yr.)	WEN Calculator - Embedded Energy Savings (kWh/yr.) 1.6 GPF conversion to 0.8 GPF	Number of Measures	Annual Water Savings in (gallons/yr.)	Annual Embedded Energy Savings (kWh)	EUL Water Savings in (gallons)	EUL Embedded Energy Savings (kWh)
High-Efficiency Toilet – 1.6 GPF conversion to 0.8 GPF	4,998.20	13.56	286	1,429,485.20	3,878.16	28,589,704.00	77,563.20
High-Efficiency Toilet – 3.5 GPF conversion to 0.8 GPF	16,868.92	45.76	13	219,295.96	594.88	4,385,919.20	11,897.60
Totals			299	1,648,781.16	4,473.04	32,975,623.20	89,460.80

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Table 9. Calculated Water and Energy Savings in ESA Regions not Implemented by RHA – 1.6 GPF Toilet Retrofits

Measure	WEN Calculator - Water Savings in (gallons/yr.)	WEN Calculator - Embedded Energy Savings (kWh/yr.) 1.6 GPF conversion to 0.8 GPF	Number of Measures	Annual Water Savings in (gallons/yr.)	Annual Embedded Energy Savings (kWh)	Expected Useful Life Water Savings in (gallons)	Expected Useful Life Embedded Energy Savings (kWh)
High-Efficiency Toilet – 1.6 GPF conversion to 0.8 GPF	**4,998.20**	**13.56**	**306**	**1,529,449.20**	**4,149.36**	**30,588,984.00**	**82,987.20**

Note: The above savings were calculated using CPUC Water / Energy Calculator data documented in the Water-Energy Nexus workpaper.

8. LOOKING FORWARD TO 2024

As the WCP moves into 2024, there will be several notable changes that will affect program production:

- The California American Water Statewide Single-Family program contract will conclude on December 31, 2023. The next iteration of this program is expected to launch in the second quarter of 2024 when California American Water's next three-year budget cycle begins.

- After conducting two successful WCP pilots in 2023, Valley Water is planning to release a bid for a full scale direct installation program in 2024.

- After conducting an incredibly successful pilot program in 2023, RHA will continue to work with the City of Fresno to develop a longer, full-scale program.

- The Bipartisan Infrastructure Law also provides funding for water efficiency projects and may serve as a catalyst for additional water agencies to participate in WCP.

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2023 ESA Program Annual Report – WECP Summary

Over the course of 2023, the ESA Program has worked to develop a foundation and framework for launching PG&E's Water-Energy Coordination Program. This was a completely fresh endeavour, and at a high level, tasks included:

- Conducting extensive background research on water agencies in California's Bay Area and Central Valley regions
- Creating a survey for ESA contractors to gain insights into their water measure work experience and best practices
- Authoring an Outreach Plan with supporting collateral
- Drafting a Program Outline to streamline outreach activities and the implementation of the initiative
- Engagement with water agencies to identify future partnerships

Water Agency Research

Planning for the Water-Energy Coordination Program (WECP) got underway around May 2023. The team needed to get acquainted with the water agency landscape and conducted research. The Resource Innovations/Ortiz Group ESA Program team discovered that the water agencies came in various configurations and sizes.

The ESA Resource Innovations/Ortiz Group Program team also found that most water agencies in the Bay Area had existing rebate programs for water conservation, while those in the Central Valley had rebate programs that were generally available for larger city water districts. Smaller water districts in the Central Valley rarely had any established water conservation rebate programs that were open to residential customers.

Given the nature and structure of the WECP initiative, which would ultimately leverage ESA contractor in-home visits, the Resource Innovations/Ortiz Group ESA Program Team focussed on the major water agencies covering the Bay Area and Central Valley PG&E ESA regions, organizing research by county (listed in Table 1 below), city/town, population, available water saving measures and rebates, and ESA contractor coverage area.

The Resource Innovations/Ortiz Group ESA Program team identified 92 of the top water agencies in the Bay Area and Central Valley as potential leveraging partners and developed a strategy to connect with them.

Table 1

Counties in PG&E's Bay Area Region	Counties in PG&E's ESA Central Valley Region
Alameda	Amador
Contra Costa	Calaveras
Marin	Fresno
Napa	Kern
San Francisco	Kings
	Madera
	Mariposa
	Merced
	San Bernadino
	San Joaquin
	Stanislaus
	Tulare
	Tuolumne

Contractor Survey, Summary, and Insights

A key aspect of the Resource Innovations/Ortiz Group Team's strategy was to gather as much information as possible from those with experience working in the field and actively doing water measure work. The ESA Resource Innovation/Ortiz Group Program team developed a survey for its ESA contractors who served the Bay Area and Central Valley to gauge their experience with water measures, insights with working with water agencies, ideas for water measure offerings, and overall sentiment and suggestions for working in this space.

Key survey findings included:

- Majority of our 15 ESA contractors had previously done water measure work with water agencies.
- Overall experience was positive; customers were happy with the water measure work.
- The primary and most common component that deemed a project a success was the installation of a new, high-efficiency toilet
- Conversely, a problematic toilet retrofit was identified as a common pitfall that could generate lost revenue for the project by contractors.
- Leveraging water measure work with ESA in-home visits was critical for project success and keeping costs down.
- A lot of interest, acceptance, and eligible customers among the low-income population for water measure work.
- Contractors indicated that more water conservation education and marketing support was desired for successfully dealing with customers.

Finally, the contractor survey research helped develop an extensive list of water measures, taken from the contractors' own work experience as well as existing water agency measures in the Bay Area and Central Valley. This formed the basis of the measure offering, which included a combined 30 indoor and outdoor water measures.

Outreach Plan

To formalize and structure water agency engagement and contractor recruitment, the Resource Innovations/Ortiz Group ESA Program Team developed an outreach plan that leveraged the background research and contractor survey results. Email templates and phone scripts were specifically tailored to the water agency region, previous experience with PG&E's ESA program, and any existing water measure rebates.

Additional supporting material was also drafted, such as an elevator pitch and introductory slide deck, to facilitate water agency networking and outreach activities.

Water Agency Targeting

To ensure the greatest leveraging potential, the Resource Innovations/Ortiz Group ESA Program team identified key water agencies to target for initial outreach efforts. Reports were generated from PG&E's database and the data was analyzed to understand where core ESA subcontractor work was being concentrated by city, relative to the water agencies' footprints.

This resulted in a shortlist of eight water agencies that collectively serve geographic areas where 71% of all ESA weatherization work was conducted in PG&E's Bay Area and Central Valley ESA regions in 2023. This included:

- <u>Bay Area</u>
    - Contra Costa Water District
    - East Bay Municipal Utility District
    - San Francisco Public Utilities Commission
- <u>Central Valley</u>

- California Water Service, Bakersfield
- California Water Service, Stockton
- City of Fresno
- City of Madera
- City of Modesto

Water Agency Outreach

Outreach kicked off in October 2023 to the top eight water agencies in the Bay Area and Central Valley. Four water agencies in the Bay Area and Central Valley expressed interest in the partnerships thus far.

Introductory meetings were held with three of the water agencies:

- Two water agencies indicated interest in working together in the near term.
- One water agency expressed interest in exploring collaboration in early 2025 as they have recently launched a similar program.

Additional research for program design

Whilst water agency outreach was underway, the team continued doing additional research in the form of a follow-up contractor survey and interviews for deeper insights into current water measure operations to inform the development of the program design and implementation strategy.

A pricing input request went out to all ESA contractors for the 30 water measures, which would ultimately be used to form a baseline of the time and materials necessary for installing or delivering the water measures.

Program Collateral

On the back of our additional research, the Resource Innovations/Ortiz Group ESA Program Team compiled a Water Measures Catalog with Pricing Guide for 2024 that has been used for water agency engagements. This has served well to provide context in terms of pricing for the water agencies, foster new measure ideas to help water agencies reach their water conservation goals, and display the comprehensive nature of the proposed program.

The Resource Innovations/Ortiz Group Program Team developed a Partnership Proposal template to help streamline the WECP offering and future negotiations. The team also drafted program forms such as the Water Measures Assessment form and Liability Release form to prepare for 2024 engagements.

Looking Ahead

In 2024, the Resource Innovations/Ortiz Group ESA Program Team plans to:

- Leverage an existing cloud-based platform to administer and manage the Water-Energy Coordination Program with water agencies and contractors.
- Further engage with two water agencies to continue discussing water measure pricing and program proposals.
- Secure at least two contracts in 2024 to start installing water measures for ESA customers. This will enable the Program Team to establish an operating rhythm and expand and scale outreach efforts with more water agencies.

10. Appendix D: PG&E's 2023 CARE Marketing Materials

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Appendix D: CARE Marketing Materials
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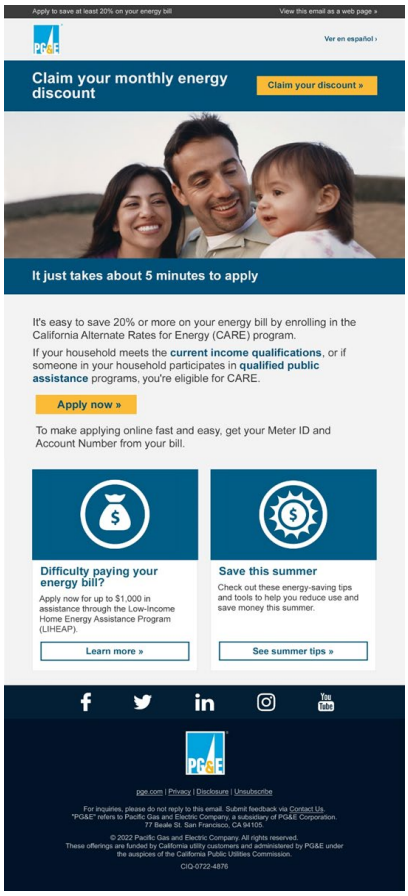
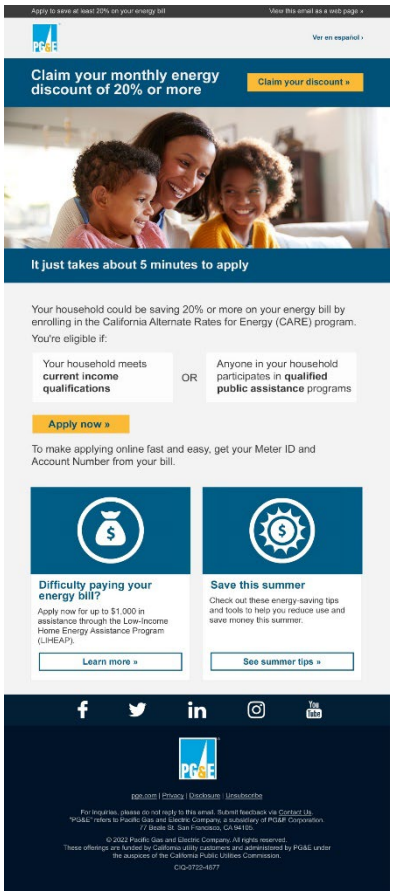
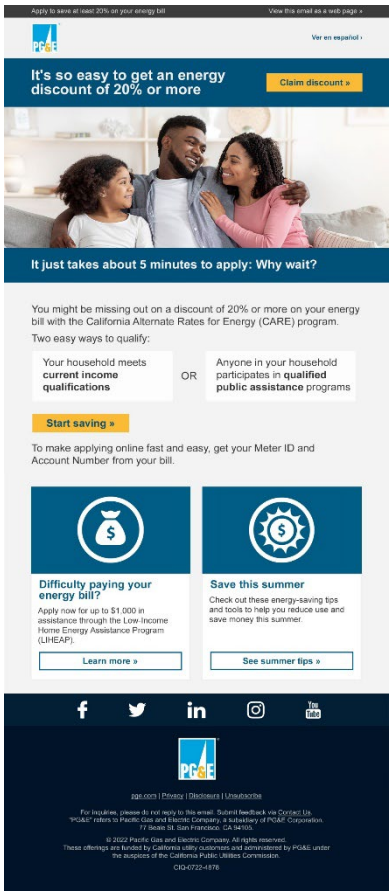
CARE Acquisition Email Samples – Touch 1, Touch 2, and Touch 3







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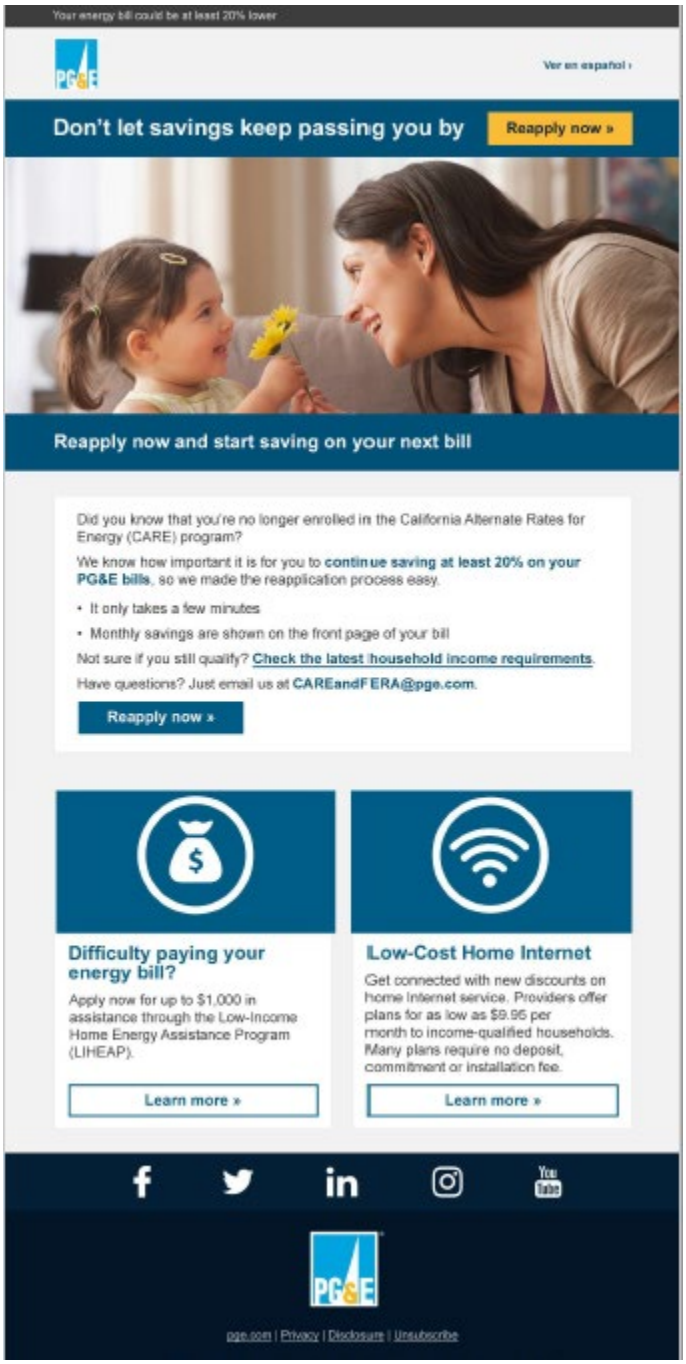
CARE Failed to Recertify Acquisition Email Sample



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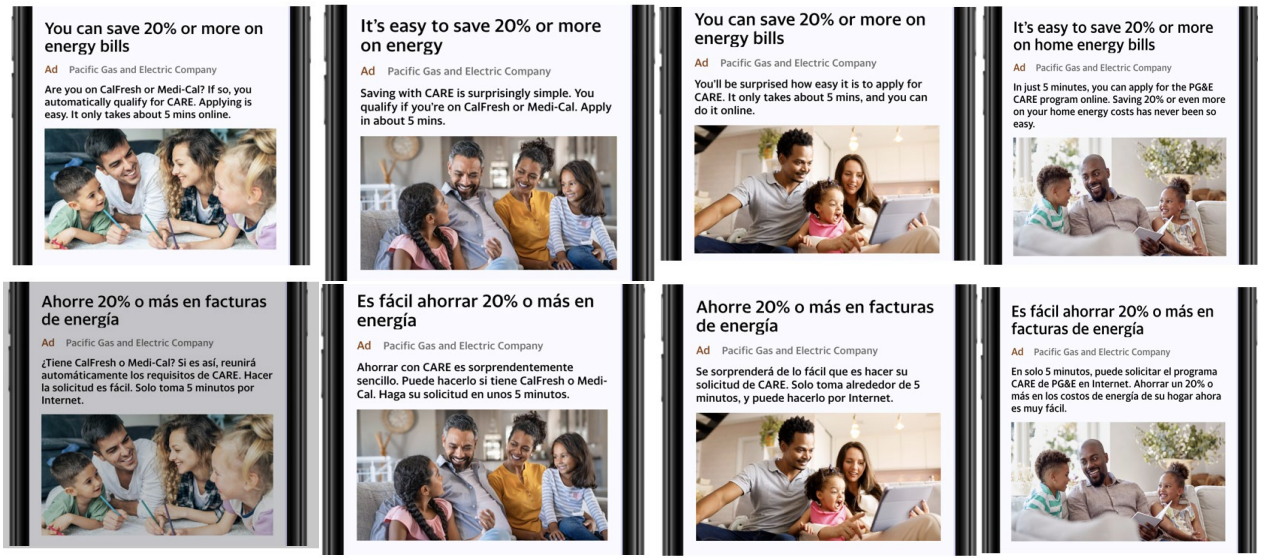
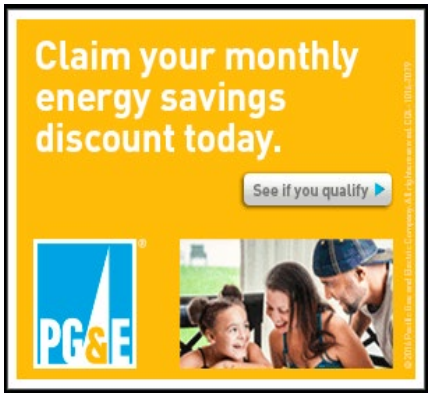
CARE Native Ad Samples (English and Spanish)



CARE Display Ad Samples (English and Spanish)



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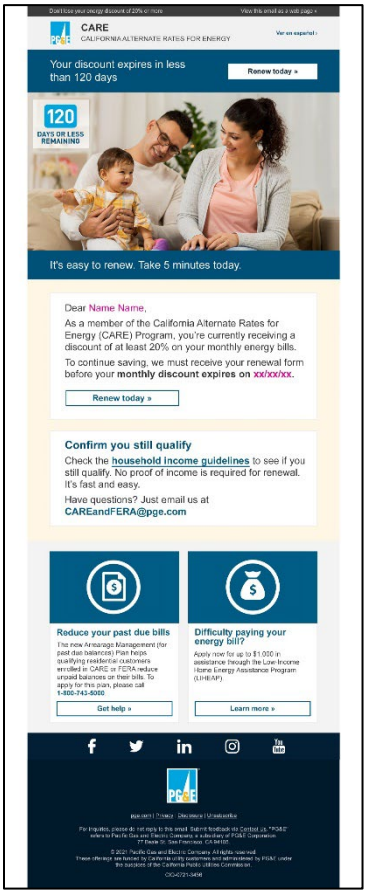
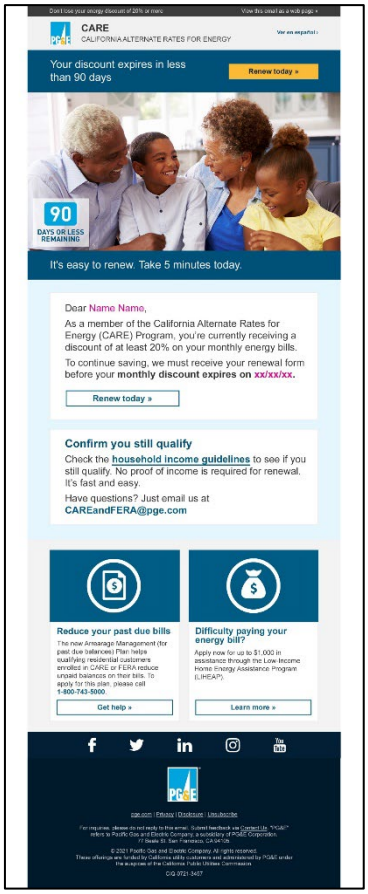
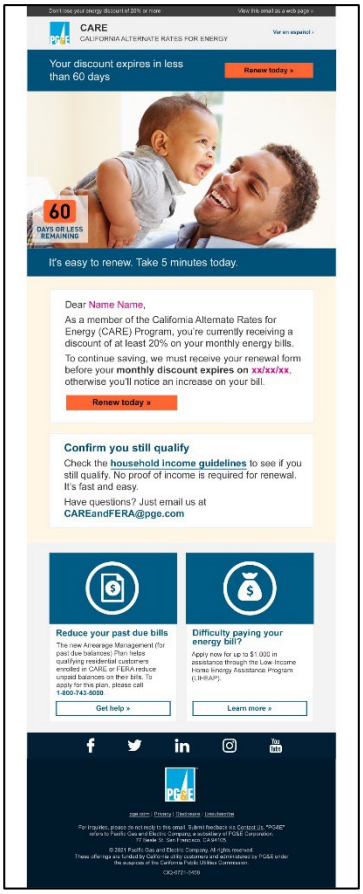
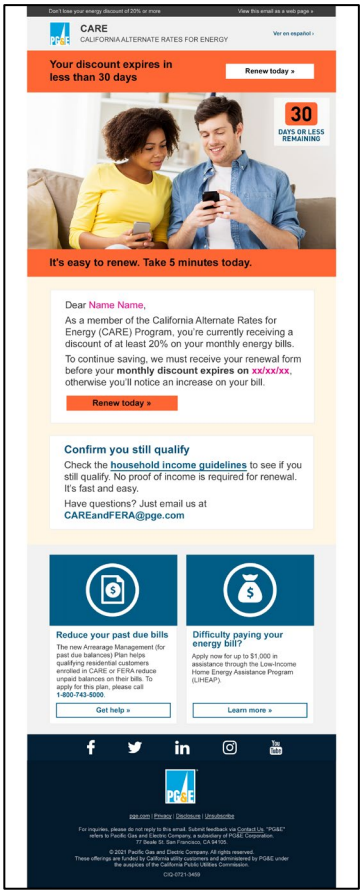
CARE Recertification Reminder Email Samples

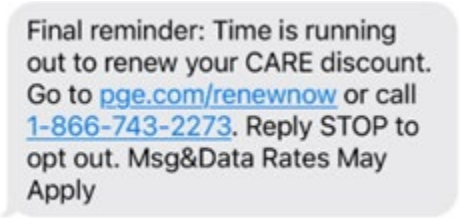








CARE Recertification Reminder Text Sample



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CARE Auto-Recertification Email Sample

Your energy discount of 20% or more is still in effect | View this email as a web page »

CARE
CALIFORNIA ALTERNATE RATES FOR ENERGY

Ver en español ›

Your monthly bill discount has been extended

Dear Name Name,

Congratulations! Your household has been automatically renewed in the California Alternate Rates for Energy (CARE) program.

Committed to helping you save

Your discount has automatically been renewed based on your past participation in the CARE program, and because we estimate that you still qualify.[1]

CARE Program eligibility

CARE eligibility is based on total income of everyone in your home. If your household income level or situation has changed, please review the **CARE Program Guidelines** to make sure you still qualify.

If you have questions or need to make changes, contact **CAREandFERA@pge.com** or call 1-866-743-2273.

See guidelines »

Reduce your past due bills

The new Arrearage Management (for past due balances) Plan helps qualifying residential customers enrolled in CARE or FERA reduce unpaid balances on their bills. To apply for this plan, please call **1-800-743-5000**.

Get help »

Difficulty paying your energy bill?

Apply now for up to $1,000 in assistance through the Low-Income Home Energy Assistance Program (LIHEAP).

Learn more »

pge.com | Privacy | Disclosure | Unsubscribe

For inquiries, please do not reply to this email. Submit feedback via Contact Us. "PG&E" refers to Pacific Gas and Electric Company, a subsidiary of PG&E Corporation. 77 Beale St. San Francisco, CA 94105.

[1] While no proof of income is required for renewal, you may be asked to provide proof of household income at any time.

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These offerings are funded by California utility customers and administered by PG&E under the auspices of the California Public Utilities Commission.

CIQ-0721-3460

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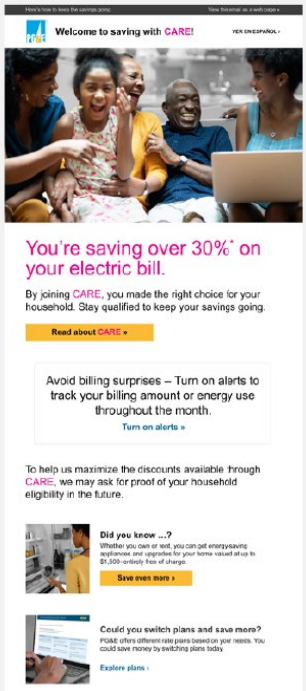
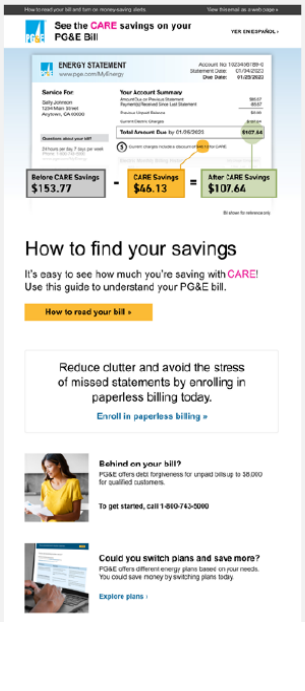
CARE Welcome Email Samples – Touch 1, Touch 2, Touch 3, and Touch 4

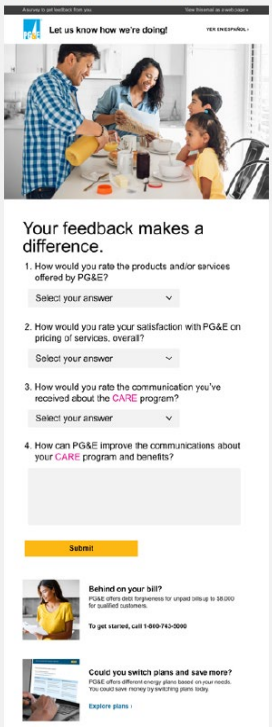
Week 1 - Welcome



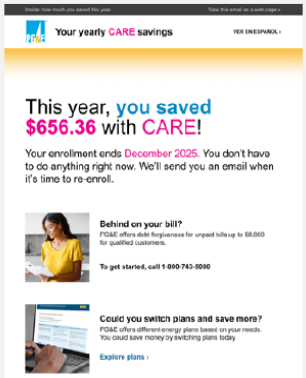
Week 3 - Understand your bill



Month 3 - Give us your feedback



1 Year - Anniversary savings



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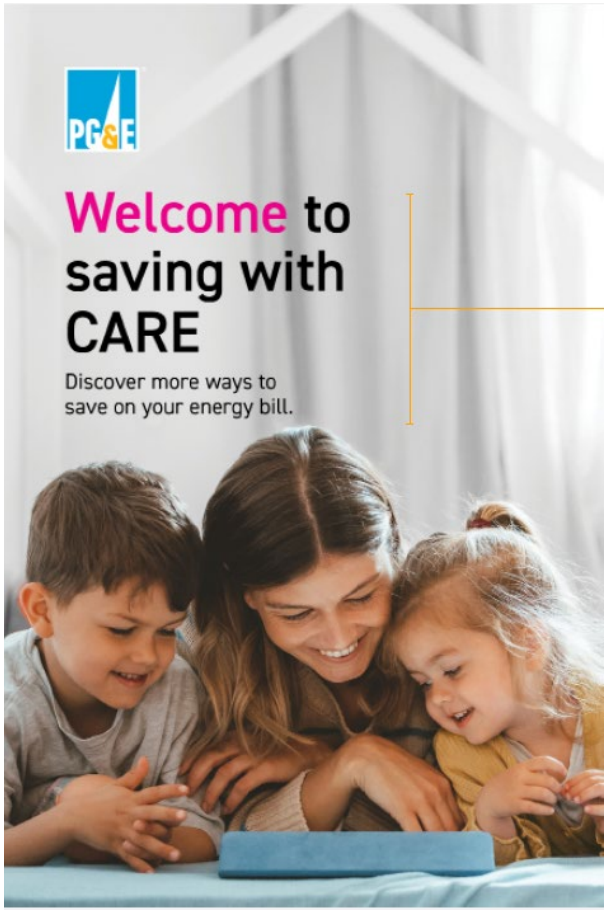
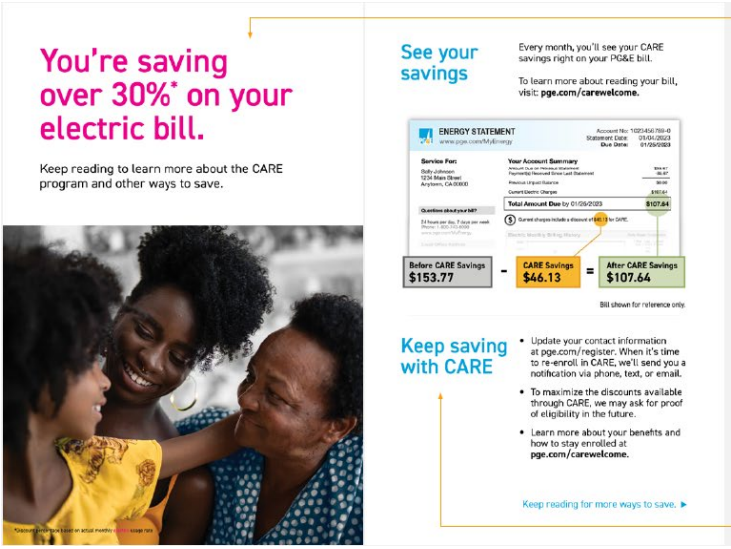
CARE Welcome Direct Mail Sample Covers (English and Spanish)





Strong lead with quantified savings

You're saving over 30% on your electric bill. (CARE - Electric)

You're saving 20% on your gas bill. (CARE - Gas)

You're saving 20% on your gas bill and 30% on your electric bill. (CARE - Dual)

Savings/value call-outs across all headlines

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CARE/FERA Annual Bill Insert (English/Spanish)

Outside Panels

CARE Program
California Alternate Rates for Energy
pge.com/care • 1-866-743-2273
Offers a monthly discount on energy bills for qualifying households.

FERA Program
Family Electric Rate Assistance
pge.com/fera • 1-800-743-5000
Offers a monthly discount on electric bills for households of three or more people with a slightly higher income than required for CARE.

Email: CAREandFERA@pge.com

Programa CARE
California Alternate Rates for Energy
pge.com/care-es • 1-866-743-2273
Ofrece un descuento mensual en las facturas de energía a los hogares que reúnan los requisitos de ingresos.

Programa FERA
Family Electric Rate Assistance
pge.com/fera-es • 1-800-660-6789
Ofrece un descuento mensual en las facturas de electricidad a familias de tres o más personas que reciban un ingreso ligeramente más alto que el requerido para CARE.

Email: CAREandFERA@pge.com

Are you on the best rate plan for how you use energy? Get your personalized rate comparison analysis at pge.com/myrateanalysis.

¿Es su plan actual de tarifas el más adecuado para su consumo de energía? Obtenga su análisis comparativo y personalizado de tarifas visitando el sitio pge.com/myrateanalysis.

Program income guidelines (good until May 31, 2024) • **Requisitos de ingreso del programa** (válido hasta el 31 de mayo, 2024)

		Number of people in household • Número de personas en el hogar							
		1-2	3	4	5	6	7	8	Each additional person, add / Por cada persona adicional, añada
Total gross annual household income* / Ingreso bruto total anual del hogar*	CARE	$39,440 or less/o menos	$49,720 or less/o menos	$60,000 or less/o menos	$70,280 or less/o menos	$80,560 or less/o menos	$90,840 or less/o menos	$101,120 or less/o menos	$10,280
	FERA	Not eligible / No es elegible	$49,721–$62,150	$60,001–$75,000	$70,281–$87,850	$80,561–$100,700	$90,841–$113,550	$101,121–$126,400	$10,280–$12,850

*Gross annual household income is the current amount of money earned from everyone in the home in one year before taxes. It includes income from all taxable and non-taxable sources. Calculate household income as of the date you apply based on current earnings of everyone living in your household going forward.

*El ingreso bruto anual del hogar es el monto actual de dinero que incluye los ingresos de todas las personas en el hogar por un año antes de impuestos. Incluye ingresos de todas las fuentes imponibles y no imponibles. Calcule los ingresos del hogar a futuro desde la fecha de su solicitud basados en los ingresos actuales de todas las personas en su hogar.

NO POSTAGE NECESSARY IF MAILED IN THE UNITED STATES

BUSINESS REPLY MAIL
FIRST-CLASS MAIL PERMIT NO. 27199 SAN FRANCISCO, CA

POSTAGE WILL BE PAID BY ADDRESSEE

PACIFIC GAS AND ELECTRIC COMPANY
CARE/FERA PROGRAM
P.O. BOX 7979
SAN FRANCISCO, CA 94120-9445

Lower your energy bills by at least 18% with CARE and FERA programs

NEW income guidelines effective June 1. See if you qualify.

Reduzca sus facturas de energía en al menos un 18% con los programas CARE y FERA

NUEVAS pautas de ingreso efectivas al 1 de junio.
Vea si califica.

Inside Panels

Moisten all edges, seal and mail to PG&E. • Humedezca todos los bordes, sellay envíe por correo a PG&E.

CARE/FERA PROGRAM APPLICATION

1. Fill out **Section 1**.
2. Fill out **Section 2A** OR **Section 2B**.
3. Sign and date this form and mail to PG&E.

If you qualify, your CARE or FERA discount will appear on the first page of your next PG&E bill.

SOLICITUD PARA EL PROGRAMA CARE/FERA

1. Complete la **Sección 1**.
2. Complete la **Sección 2A** ó la **Sección 2B**.
3. Firme y ponga la fecha en esta solicitud y envíela por correo a PG&E.

Si usted cumple con los requisitos, su descuento CARE o FERA aparecerá en la primera página de su próxima factura de PG&E.

1 You and your household • Usted y su hogar

Account holder's name (Use the name as it appears on your PG&E bill, which must be in your name.) / **Nombre del titular de la cuenta** (Como aparece en su factura de PG&E, la cual debe estar en su nombre.)

Your PG&E account number (Find yours on page 1 of your PG&E bill.) / **Su número de cuenta de PG&E** (Encuéntrelo en la primera página de su factura de PG&E.)

Your home address (Address must be your primary residence. Do **NOT** use a P.O. Box.) • Unit # / **La dirección de su hogar** (La dirección debe ser su residencia principal. **NO** utilice casilla de correo [P.O. Box].) • Unidad #

Preferred phone number • Número de teléfono preferido ☐ Home/Hogar ☐ Work/Trabajo ☐ Mobile/Móvil

City/State/Zip Code • Ciudad/estado/código postal

Alternative phone number • Número de teléfono alternativo ☐ Home/Hogar ☐ Work/Trabajo ☐ Mobile/Móvil

Email address • Dirección de email (By entering your email address, you are authorizing PG&E to send you information from time to time regarding your PG&E utility service and PG&E programs and services that may be available to you.) • (Al escribir su dirección de email, usted autoriza que PG&E le envíe información de vez en cuando, en relación a servicios y programas de PG&E que podrían estar disponibles para usted.)

Number of people in your household at this address:
Número de personas en el hogar en esta dirección:
Adults / **Adultos** ☐ + **Children** (under 18) / **Niños** (menores de 18) ☐ = ☐

What is your preferred method of communication? (Choose one) / **¿Cuál es su método de comunicación preferido?** (Elija uno)
☐ Mail/Correo ☐ Email/Email ☐ Phone/Teléfono ☐ Text/Texto (Message and data rates may apply. Podría haber cargos por mensaje y datos.)

What language do you prefer for future CARE and FERA communications? (Choose one) • ¿Qué idioma prefiere para comunicaciones futuras de CARE y FERA? (Elija uno)
☐ English/Inglés ☐ Spanish/Español ☐ Mandarin/Mandarín ☐ Cantonese/Cantonés ☐ Vietnamese/Vietnamita ☐ Russian/Ruso ☐ Korean/Coreano ☐ Tagalog/Tagalo ☐ Hmong/Hmong

2 Household qualification • Cumplimiento de los requisitos del hogar

Fill out Section 2A **OR** Section 2B. | Complete la Sección 2A **O** la Sección 2B.

2A Public assistance programs • Programas de asistencia pública
Check all the programs in which you, or someone in your household, participate. • Marque todos los programas en los que usted o alguien en su hogar participa.

☐ Low-Income Home Energy Assistance Program (LIHEAP)
☐ Women, Infants, and Children (WIC)
☐ CalFresh/SNAP (Food stamps/estampillas de alimentos)
☐ CalWORKs (TANF) or/o Tribal TANF
☐ Head Start Income Eligible (Tribal only/solo tribus indígenas)
☐ Supplemental Security Income (SSI)
☐ Medi-Cal for Families (Healthy Families A&B)
☐ National School Lunch Program (NSLP)
☐ Bureau of Indian Affairs General Assistance
☐ Medicaid/Medi-Cal (under age 65/menor de 65 años)
☐ Medicaid/Medi-Cal (age 65 and over/65 años o más)

OR/O

2B Household income • Ingresos del hogar

☐ I am currently on a fixed income and receive income or benefits from one or more of the following: pensions, Social Security, SSP or SSDI, interest/dividends from retirement accounts, Medicaid/Medi-Cal (age 65 and over) or SSI.

☐ Actualmente tengo ingresos fijos y recibo ingresos o beneficios de uno o más de los siguientes programas: pensiones, Seguro social, SSP o SSDI, intereses/dividendos de cuentas de jubilación, Medicaid/Medi-Cal (65 años o más) o SSI.

My household income is:
Total gross annual household income $ _____ .00
(please account for all income from every household member)

Los ingresos de mi hogar son:
Total de ingresos anuales brutos del hogar $ _____ .00
(por favor, incluya todos los ingresos de todos los miembros del hogar)

3 Your declaration • Su declaración

By signing this declaration, I certify that the information I have provided in this application is true and correct.

I acknowledge that I have read and understood the contents of this application. I also agree to follow the terms and conditions of the CARE or the FERA program, including the following:

1. I am not claimed as a dependent on another person's income tax return other than my spouse.
2. I am not knowingly sharing an energy meter with another home.
3. I will notify PG&E if my household is no longer eligible for the CARE or FERA discount.
4. I understand I may be required to provide proof of household income.
5. I understand I may be required to participate in the Energy Savings Assistance Program.
6. I understand I may be removed from the CARE program if my monthly electric usage exceeds six times the Tier 1 allowance.
7. I understand that I may be switched or dropped from the CARE or FERA program if I submit information or PG&E receives information from other programs which deem me ineligible.
8. I authorize PG&E to share my information in order to remain eligible for available energy management assistance, and price reduction and residential rate programs with other utilities, state agencies and entities designated by the CPUC.
9. I will pay back the discount I have received if I provided false information to support my application for the CARE or the FERA program.

Al firmar esta declaración, certifico que la información que he proporcionado en esta solicitud es verdadera y correcta.

Reconozco que he leído y comprendido el contenido de esta solicitud. Asimismo, convengo en respetar los términos y condiciones del programa CARE o del programa FERA, incluyendo los siguientes:

1. No he sido designado como dependiente en la declaración de impuestos de otra persona con excepción de mi cónyuge.
2. No comparto intencionalmente un medidor de energía con otra vivienda.
3. Notificaré a PG&E si mi hogar deja de reunir los requisitos para recibir el descuento de CARE o FERA.
4. Comprendo que yo podría estar obligado a proporcionar un comprobante de los ingresos de mi hogar.
5. Comprendo que yo podría estar obligado a participar en el Energy Savings Assistance Program.
6. Comprendo que yo podría ser retirado del programa CARE si mi consumo eléctrico mensual excede seis veces el límite de consumo permitido del Nivel 1.
7. Entiendo que me pueden cambiar o darme de baja del programa CARE o FERA si presento información o PG&E recibe información de otros programas que consideran que no reúno los requisitos.
8. Autorizo a PG&E a compartir mi información con el fin de seguir reuniendo los requisitos de la asistencia disponible para la administración de la energía y los programas de reducción de precios y tarifas residenciales con otras empresas de servicios públicos, agencias estatales y entidades designadas por la CPUC.
9. Reembolsaré el descuento que yo haya recibido si proporcioné información falsa para apoyar mi solicitud a los programas CARE o FERA.

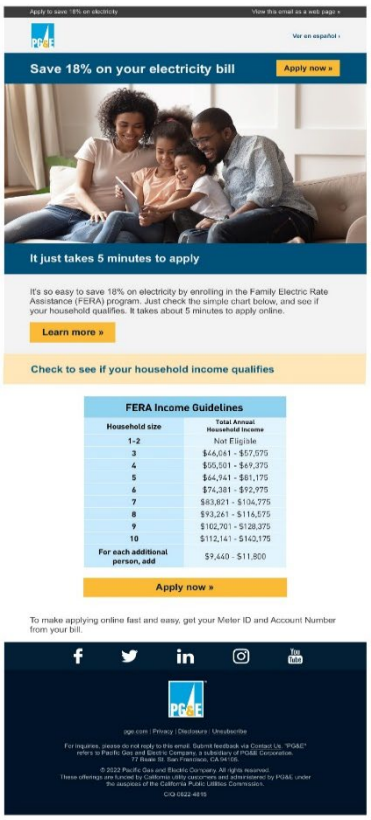
X
Customer signature • Firma del cliente ○ Fill in circle if you are a guardian or you have power of attorney / Rellene el círculo si es tutor o tiene carta de poder. **Date** • Fecha

FOR INTERNAL USE ONLY
BILL

11. Appendix E: PG&E's 2023 FERA Marketing Materials

Pacific Gas and Electric Company | Program Year 2023
Appendix E: FERA Marketing Materials
Page 1 of 13

FERA Acquisition Email Samples – Touch 1, Touch 2, and Touch 3



Apply to save 18% on electricity | View this email as a web page »

Ver en español ›

Save 18% on your electricity bill Apply now »

It just takes 5 minutes to apply

It's so easy to save 18% on electricity by enrolling in the Family Electric Rate Assistance (FERA) program. Just check the simple chart below, and see if your household qualifies. It takes about 5 minutes to apply online.

Learn more »

Check to see if your household income qualifies

FERA Income Guidelines	
Household size	Total Annual Household Income
1-2	Not Eligible
3	$46,061 - $57,575
4	$55,501 - $69,375
5	$64,941 - $81,175
6	$74,381 - $92,975
7	$83,821 - $104,775
8	$93,261 - $116,575
9	$102,701 - $128,375
10	$112,141 - $140,175
For each additional person, add	$9,440 - $11,800

Apply now »

To make applying online fast and easy, get your Meter ID and Account Number from your bill.

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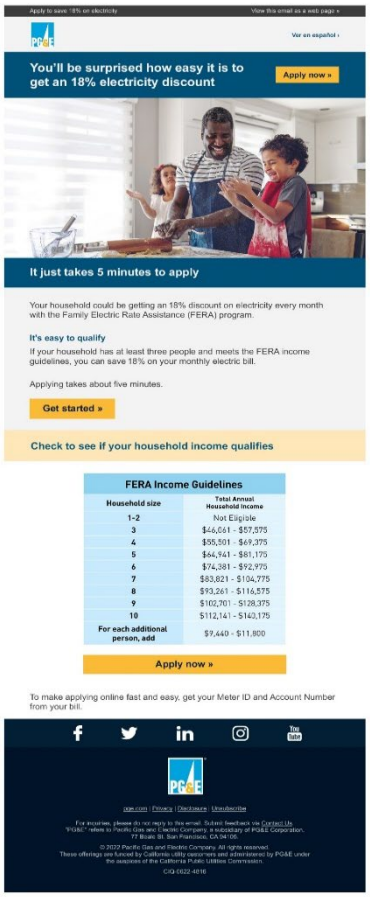
CIQ 0622 4815



Apply to save 18% on electricity | View this email as a web page »

Ver en español ›

You'll be surprised how easy it is to get an 18% electricity discount Apply now »

It just takes 5 minutes to apply

Your household could be getting an 18% discount on electricity every month with the Family Electric Rate Assistance (FERA) program.

It's easy to qualify

If your household has at least three people and meets the FERA income guidelines, you can save 18% on your monthly electric bill.

Applying takes about five minutes.

Get started »

Check to see if your household income qualifies

FERA Income Guidelines	
Household size	Total Annual Household Income
1-2	Not Eligible
3	$46,061 - $57,575
4	$55,501 - $69,375
5	$64,941 - $81,175
6	$74,381 - $92,975
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10	$112,141 - $140,175
For each additional person, add	$9,440 - $11,800

Apply now »

To make applying online fast and easy, get your Meter ID and Account Number from your bill.

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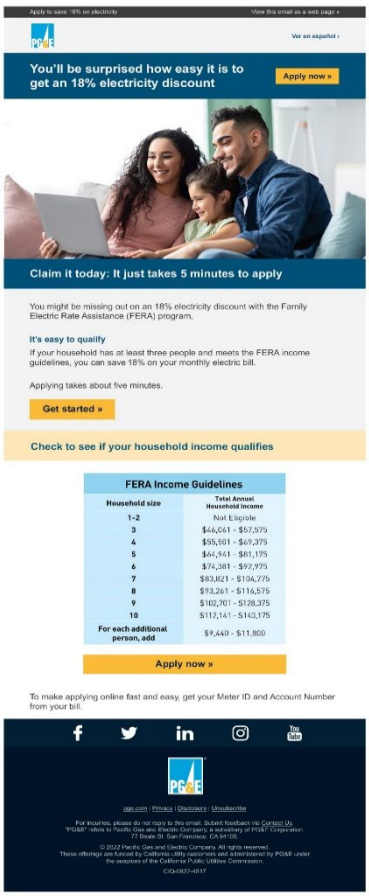
CIQ 0622 4816



Apply to save 18% on electricity | View this email as a web page »

Ver en español ›

You'll be surprised how easy it is to get an 18% electricity discount Apply now »

Claim it today: It just takes 5 minutes to apply

You might be missing out on an 18% electricity discount with the Family Electric Rate Assistance (FERA) program.

It's easy to qualify

If your household has at least three people and meets the FERA income guidelines, you can save 18% on your monthly electric bill.

Applying takes about five minutes.

Get started »

Check to see if your household income qualifies

FERA Income Guidelines	
Household size	Total Annual Household Income
1-2	Not Eligible
3	$46,061 - $57,575
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8	$93,261 - $116,575
9	$102,701 - $128,375
10	$112,141 - $140,175
For each additional person, add	$9,440 - $11,800

Apply now »

To make applying online fast and easy, get your Meter ID and Account Number from your bill.

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CIQ 0622 4817

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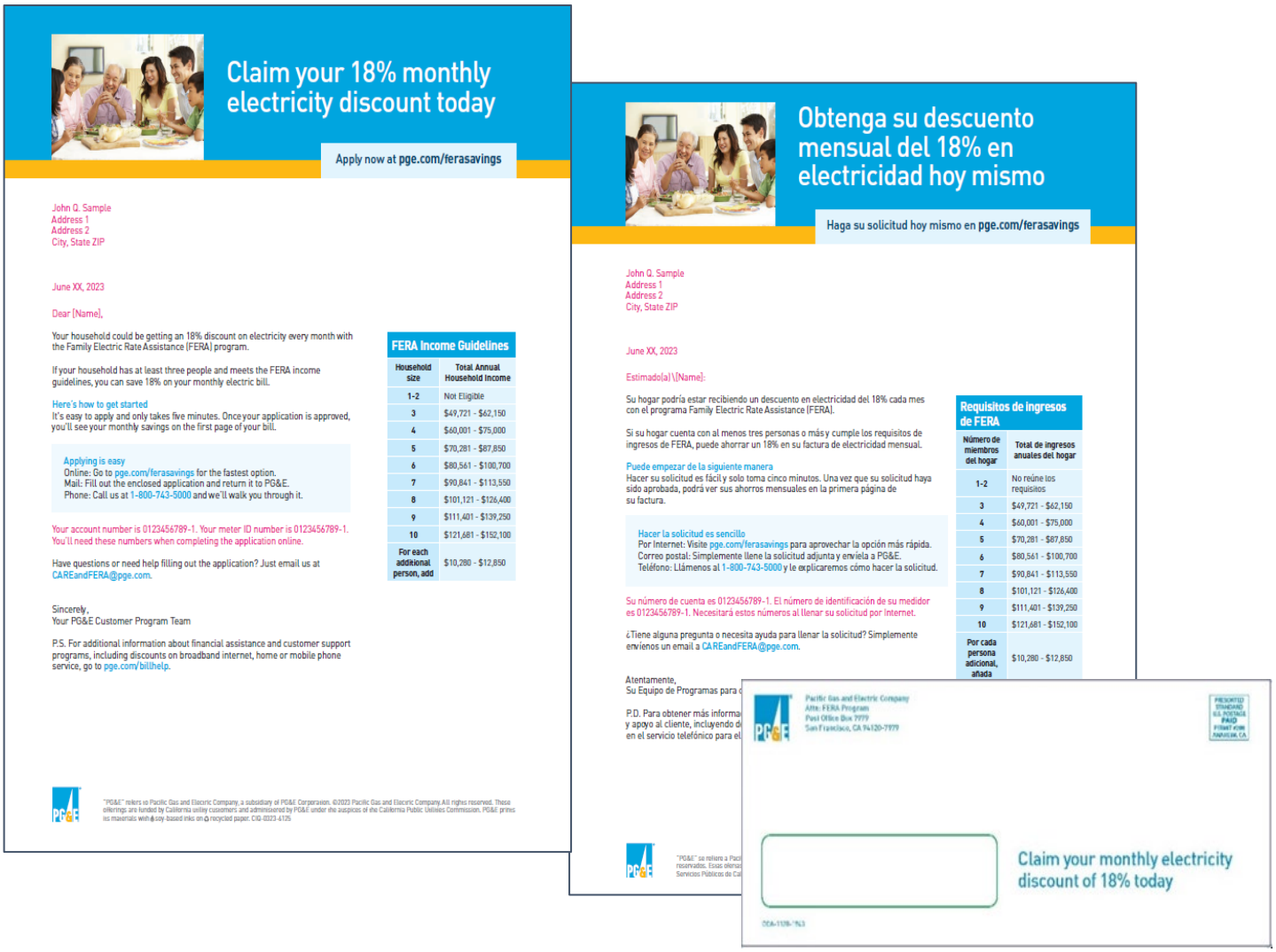
FERA Acquisition Direct Mail Sample – Touch 1 (English/Spanish)



Claim your 18% monthly electricity discount today

Apply now at pge.com/ferasavings

John Q. Sample
Address 1
Address 2
City, State ZIP

June XX, 2023

Dear [Name],

Your household could be getting an 18% discount on electricity every month with the Family Electric Rate Assistance (FERA) program.

If your household has at least three people and meets the FERA income guidelines, you can save 18% on your monthly electric bill.

Here's how to get started
It's easy to apply and only takes five minutes. Once your application is approved, you'll see your monthly savings on the first page of your bill.

Applying is easy
Online: Go to pge.com/ferasavings for the fastest option.
Mail: Fill out the enclosed application and return it to PG&E.
Phone: Call us at 1-800-743-5000 and we'll walk you through it.

Your account number is 0123456789-1. Your meter ID number is 0123456789-1. You'll need these numbers when completing the application online.

Have questions or need help filling out the application? Just email us at CAREandFERA@pge.com.

Sincerely,
Your PG&E Customer Program Team

P.S. For additional information about financial assistance and customer support programs, including discounts on broadband internet, home or mobile phone service, go to pge.com/billhelp.

FERA Income Guidelines

Household size	Total Annual Household Income
1-2	Not Eligible
3	$49,721 - $62,150
4	$60,001 - $75,000
5	$70,281 - $87,850
6	$80,561 - $100,700
7	$90,841 - $113,550
8	$101,121 - $126,400
9	$111,401 - $139,250
10	$121,681 - $152,100
For each additional person, add	$10,280 - $12,850

Obtenga su descuento mensual del 18% en electricidad hoy mismo

Haga su solicitud hoy mismo en pge.com/ferasavings

John Q. Sample
Address 1
Address 2
City, State ZIP

June XX, 2023

Estimado(a) \{Name}:

Su hogar podría estar recibiendo un descuento en electricidad del 18% cada mes con el programa Family Electric Rate Assistance (FERA).

Si su hogar cuenta con al menos tres personas o más y cumple los requisitos de ingresos de FERA, puede ahorrar un 18% en su factura de electricidad mensual.

Puede empezar de la siguiente manera
Hacer su solicitud es fácil y solo toma cinco minutos. Una vez que su solicitud haya sido aprobada, podrá ver sus ahorros mensuales en la primera página de su factura.

Hacer la solicitud es sencillo
Por Internet: Visite pge.com/ferasavings para aprovechar la opción más rápida.
Correo postal: Simplemente llene la solicitud adjunta y envíela a PG&E.
Teléfono: Llámenos al 1-800-743-5000 y le explicaremos cómo hacer la solicitud.

Su número de cuenta es 0123456789-1. El número de identificación de su medidor es 0123456789-1. Necesitará estos números al llenar su solicitud por Internet.

¿Tiene alguna pregunta o necesita ayuda para llenar la solicitud? Simplemente envíenos un email a CAREandFERA@pge.com.

Atentamente,
Su Equipo de Programas para

P.D. Para obtener más informa
y apoyo al cliente, incluyendo d
en el servicio telefónico para el

Requisitos de ingresos de FERA

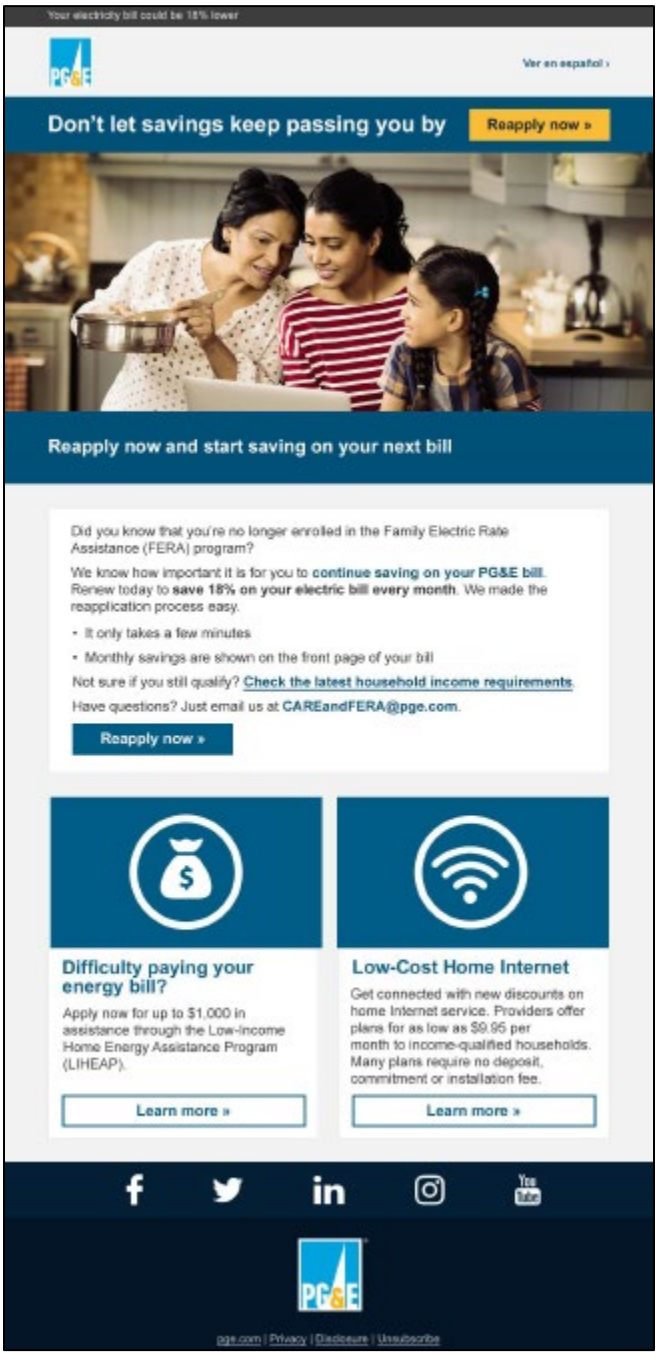
Número de miembros del hogar	Total de ingresos anuales del hogar
1-2	No reúne los requisitos
3	$49,721 - $62,150
4	$60,001 - $75,000
5	$70,281 - $87,850
6	$80,561 - $100,700
7	$90,841 - $113,550
8	$101,121 - $126,400
9	$111,401 - $139,250
10	$121,681 - $152,100
Por cada persona adicional, añada	$10,280 - $12,850

Pacific Gas and Electric Company
Attn: FERA Program
Post Office Box 7979
San Francisco, CA 94120-7979

Claim your monthly electricity discount of 18% today

Pacific Gas and Electric Company | Program Year 2023
Appendix E: FERA Marketing Materials
Page 3 of 13

FERA Failed to Recertify Email Sample



Pacific Gas and Electric Company | Program Year 2023
Appendix E: FERA Marketing Materials
Page 4 of 13

FERA Failed to Recertify Direct Mail Sample

Renew now to get your monthly FERA discount again

John Q. Sample
Address 1
Address 2
City, State, ZIP

You'll get 18% off your electric bill every month:
Go to pge.com/FERArenewal

September 29, 2022

Dear [Name],

Start saving again with FERA
You're no longer enrolled in the Family Electric Rate Assistance (FERA) program, and we know how important it is for you to continue saving. As a member of the FERA program, you previously received an 18% monthly discount on your Pacific Gas and Electric Company (PG&E) electric bills. Reapply to start getting your discount again.

Reapplying is easy
Answer a few simple questions and join more than 1.5 million customers who already benefit from PG&E discount programs.

Online: Go to pge.com/FERArenewal for the fastest option.
Phone: Call us at 1-866-743-2273 and we'll walk you through it.
Mail: Fill out the enclosed application and return it to PG&E.

Your account number is 0123456789-1. Your meter ID number is 0123456789.
You'll need these numbers when completing the application online.

Have questions or need help filling out the application? Just email us at CAREandFERA@pg

Sincerely,

Your PG&E Customer Program Team

P.S. You can also help family, friends and neighbors who may qualify by referring them to pge.com/careferadiscount. For additional information about financial assistance and suppo including programs like low-cost internet and discounts on home or mobile phone service, g pge.com/billhelp.

Renueve ahora mismo para volver a obtener su descuento mensual de FERA

John Q. Sample
Address 1
Address 2
City, State, ZIP

Recibirá un descuento del 18% en su factura de electricidad todos los meses:
pge.com/FERArenewal

29 de septiembre de 2022

Estimado/a [Name]:

Empiece a ahorrar de nuevo con FERA
Usted ya no está inscrito en el programa Family Electric Rate Assistance (FERA), y sabemos lo importante que es para usted seguir ahorrando. Como miembro del Programa FERA, usted antiguamente recibía un descuento mensual del 18% en sus facturas de electricidad de Pacific Gas and Electric Company (PG&E). Vuelva a hacer su solicitud para empezar a recibir su descuento nuevamente.

Volver a hacer la solicitud es fácil
Conteste unas cuantas preguntas sencillas y únase a los más de 1.5 millones de clientes que ya se benefician de los programas de descuento de PG&E.

Por Internet: Visite pge.com/FERArenewal para aprovechar la opción más rápida.
Teléfono: Llámenos al 1-866-743-2273 y le guiaremos a través del trámite.
Correo Postal: Llene la solicitud adjunta y envíela a PG&E.

Su número de cuenta es 0123456789-1. El número de identificación de su medidor es 0123456789.
Necesitará estos números al llenar su solicitud por Internet.

¿Tiene alguna pregunta o necesita ayuda para llenar la solicitud? Simplemente envíenos un email a CAREandFERA@pge.com

Atentamente,

Su equipo del programa de atención al cliente de PG&E

P.D.: Usted también puede ayudar a sus familiares, amigos y vecinos que podrían reunir los requisitos remitiéndolos a pge.com/careferadiscount. Para obtener más información sobre la asistencia financiera y el apoyo disponibles, incluyendo programas como Internet de bajo costo y descuentos en el servicio telefónico para

Pacific Gas and Electric Company
Attn: FERA Program
Post Office Box 7979
San Francisco, CA 94120-7979

PRESORTED STANDARD U.S. POSTAGE PAID PERMIT #288 ANAHEIM, CA

Reclaim your discount.
Get 18% off your electric bill every month.

CCA-0322-4498

Pacific Gas and Electric Company | Program Year 2023
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FERA Direct Mail to CARE Failed to Recertify Non-Responders Sample

Apply to save 18% on electricity | View this email as a web page >

Ver en español >

No longer qualify for CARE? Apply for FERA discount »

You may still be eligible for the FERA 18% electricity discount

Even if you no longer qualify for CARE, it's possible to qualify for the FERA 18% electricity discount. That saves customers an average of about $38* a month. Check the simple chart below, and see if your household is eligible. It takes about 5 minutes to apply online.

Learn more »

Check to see if your household income qualifies

FERA Income Guidelines

Household size	Total Annual Household Income
1-2	Not Eligible
3	$49,721 - $62,150
4	$60,001 - $75,000
5	$70,281 - $87,850
6	$80,561 - $100,700
7	$90,841 - $113,550
8	$101,121 - $126,400
9	$111,401 - $139,250
10	$121,681 - $152,100
For each additional person, add	$10,280 - $12,850

Apply now »

To make applying online fast and easy, get your Meter ID and Account Number from your bill.

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

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CCC-0723-6533

No longer qualify for CARE?

You may still be eligible for the FERA 18% electricity discount

Apply now at **pge.com/fera18**

John Q. Sample
Address 1
Address 2
City, State ZIP

June XX, 2023

Dear [Name],

Even if you no longer qualify for CARE, you may be eligible for the FERA 18% electricity discount. **That saves customers an average of $38* a month.**

If your household has at least three people and meets the FERA income guidelines, you'll qualify. Check your household's combined income in the chart to the right.

FERA customers save about $38 per month

Applying is easy
Online: Go to pge.com/fera18 for the fastest option.
Mail: Fill out the enclosed application and return it to PG&E.
Phone: Call us at 1-800-743-5000 and we'll walk you through it.

Your account number is 0123456789-1. Your meter ID number is 0123456789-1. You'll need these numbers when completing the application online.

Have questions or need help filling out the application? Email us at CAREandFERA@pge.com.

Sincerely,
Your PG&E Customer Program Team

P.S. For additional information about financial assistance and customer support programs, including discounts on broadband internet, home or mobile phone service, go to pge.com/billhelp.

FERA Income Guidelines

Household size	Total Annual Household Income
1-2	Not Eligible
3	$49,721 - $62,150
4	$60,001 - $75,000
5	$70,281 - $87,850
6	$80,561 - $100,700
7	$90,841 - $113,550
8	$101,121 - $126,400
9	$111,401 - $139,250
10	$121,681 - $152,100
For each additional person, add	$10,280 - $12,850

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

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PG&E prints its materials with soy based inks on recycled paper. 013-1005-4139

Pacific Gas and Electric Company
Attn: FERA Program
300 Lakeside Drive
Oakland, CA 94612

PRESORTED STANDARD U.S. POSTAGE PAID PERMIT #288 ANAHEIM, CA

No longer eligible for CARE?

You may still qualify for the FERA 18% electricity discount

CCC-0723-6581

Pacific Gas and Electric Company | Program Year 2023
Appendix E: FERA Marketing Materials
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FERA Non-Responder Test Direct Mail Samples

Control Version

Front

Back

Test Version

Front

Back

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Appendix E: FERA Marketing Materials
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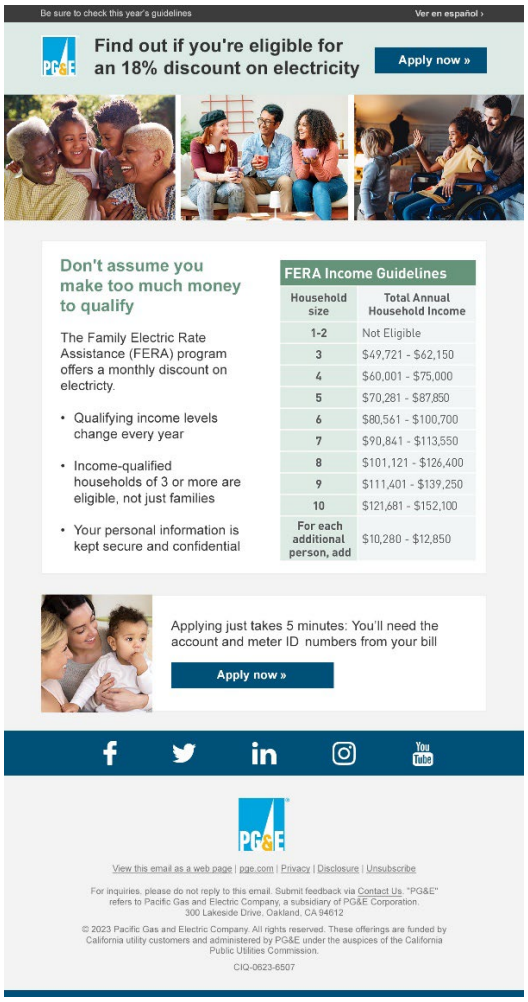
FERA Non-Responder Test Email Samples

Control Version



Be sure to check this year's guidelines — Ver en español ›

Find out if you're eligible for an 18% discount on electricity

Apply now »

Don't assume you make too much money to qualify

The Family Electric Rate Assistance (FERA) program offers a monthly discount on electricity.

- Qualifying income levels change every year
- Income-qualified households of 3 or more are eligible, not just families
- Your personal information is kept secure and confidential

FERA Income Guidelines

Household size	Total Annual Household Income
1-2	Not Eligible
3	$49,721 - $62,150
4	$60,001 - $75,000
5	$70,281 - $87,850
6	$80,561 - $100,700
7	$90,841 - $113,550
8	$101,121 - $126,400
9	$111,401 - $139,250
10	$121,681 - $152,100
For each additional person, add	$10,280 - $12,850

Applying just takes 5 minutes: You'll need the account and meter ID numbers from your bill

Apply now »

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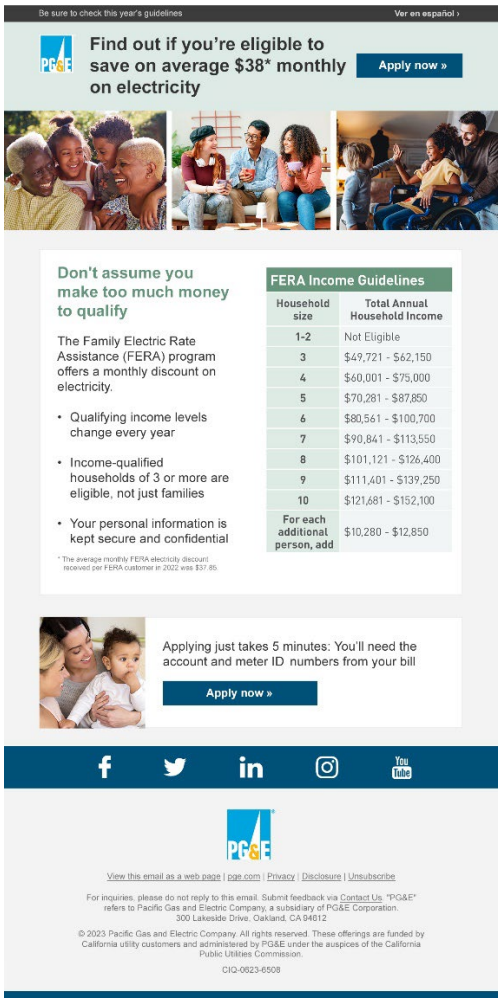
CIQ-0623-6507

Test Version



Be sure to check this year's guidelines — Ver en español ›

Find out if you're eligible to save on average $38* monthly on electricity

Apply now »

Don't assume you make too much money to qualify

The Family Electric Rate Assistance (FERA) program offers a monthly discount on electricity.

- Qualifying income levels change every year
- Income-qualified households of 3 or more are eligible, not just families
- Your personal information is kept secure and confidential

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

FERA Income Guidelines

Household size	Total Annual Household Income
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5	$70,281 - $87,850
6	$80,561 - $100,700
7	$90,841 - $113,550
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9	$111,401 - $139,250
10	$121,681 - $152,100
For each additional person, add	$10,280 - $12,850

Applying just takes 5 minutes: You'll need the account and meter ID numbers from your bill

Apply now »

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CIQ-0623-6508

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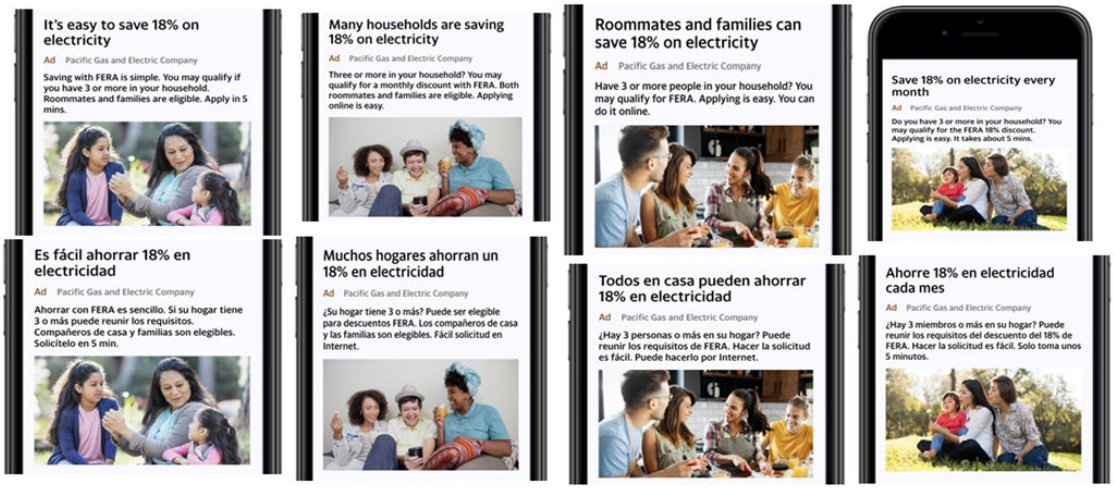
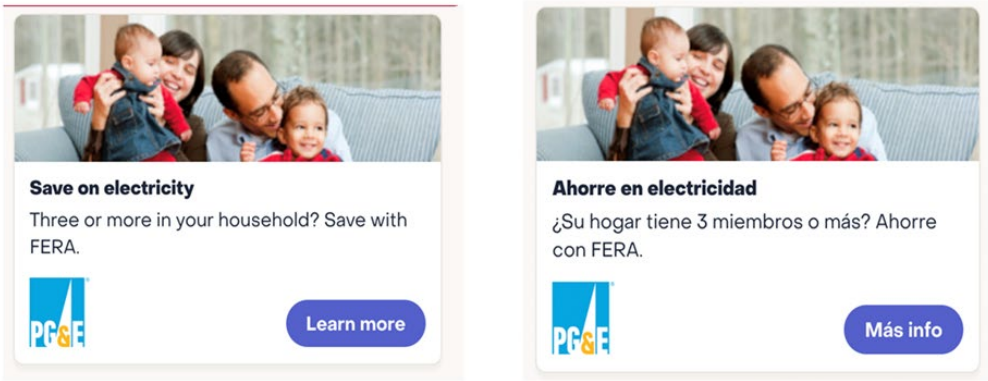
FERA Native Ad Samples (English and Spanish)



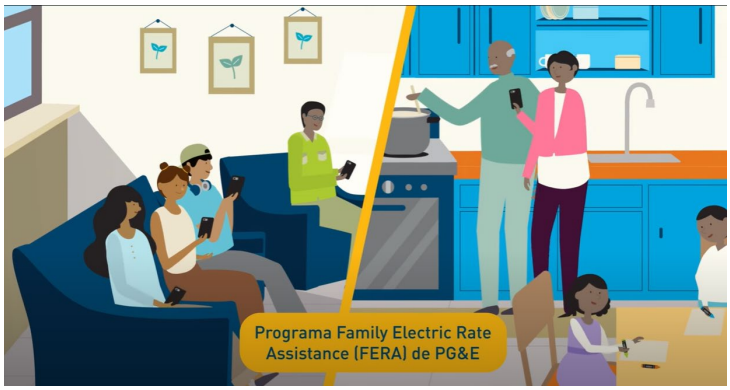
Yahoo Native – English & Spanish Banners:



FERA Display Ad Samples (English and Spanish)

FERA Hard-to-Reach Spanish Digital Campaign Samples

Video: https://www.youtube.com/watch?v=UtO_Wh8XRfw



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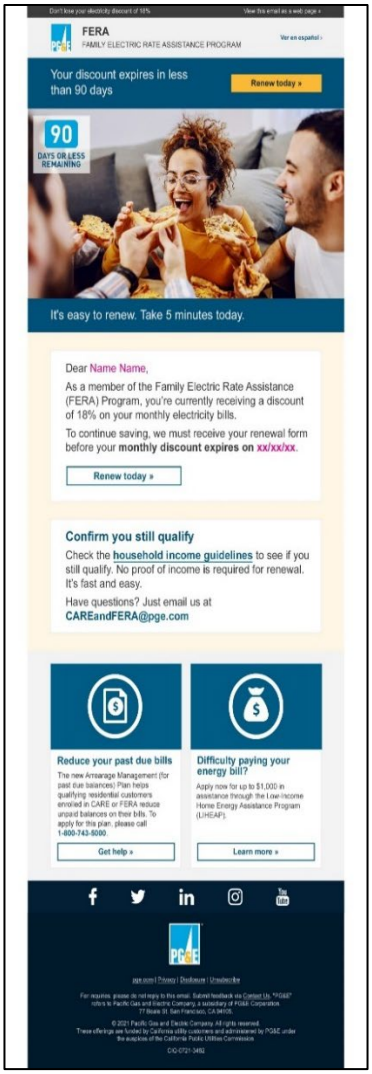
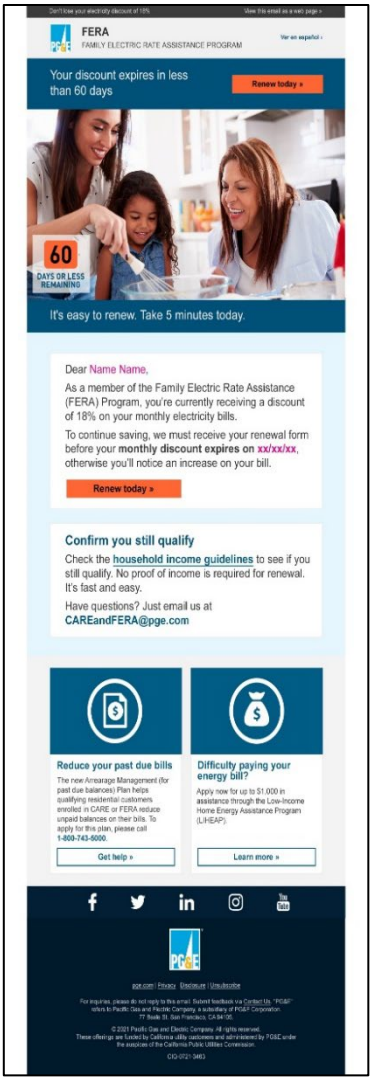
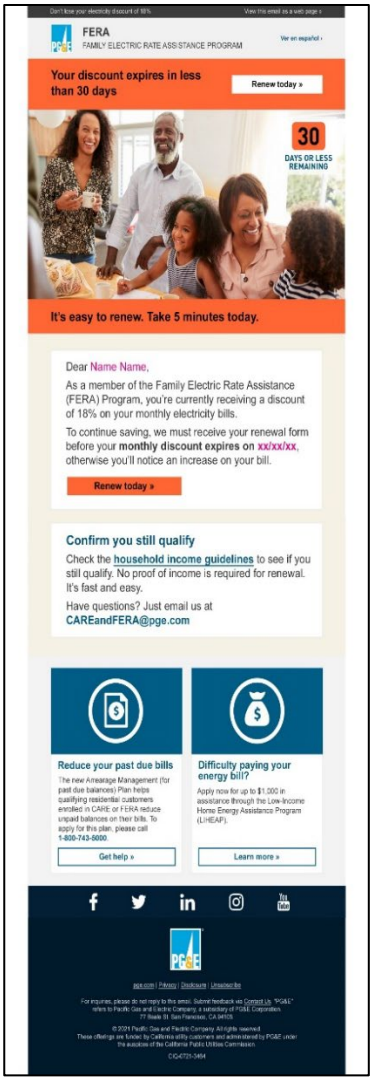
FERA Recertification Reminder Email Samples







FERA Recertification Reminder Text Sample

Final reminder: Time is running out to renew your FERA discount. Go to pge.com/renew or call 1-866-743-2273. Reply STOP to opt out. Msg&Data Rates May Apply

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FERA Auto-Recertification Email Sample

Your electricity discount of 18% is still in effect | View this email as a web page »

Family Electric Rate Assistance
Good news about your discounted rate

Ver en español ›

Your monthly bill discount has been extended

Dear Name Name,

Congratulations! Your household has been automatically renewed in the California Alternate Rates for Energy (CARE) program.

Committed to helping you save
Your discount has automatically been renewed based on your past participation in the FERA program, and because we estimate the you still qualify.[1]

FERA Program eligibility
FERA eligibility is based on total income of everyone in your home. If your household income level or situation has changed, please review the **FERA Program Guidelines** to make sure you still qualify.

If you have questions or need to make changes, contact **CAREandFERA@pge.com** or call 1-866-743-2273.

See guidelines »

Reduce your past due bills
The new Arrearage Management (for past due balances) Plan helps qualifying residential customers enrolled in CARE or FERA reduce unpaid balances on their bills. To apply for this plan, please call **1-800-743-5000**.

Get help »

Difficulty paying your energy bill?
Apply now for up to $1,000 in assistance through the Low-Income Home Energy Assistance Program (LIHEAP).

Learn more »

pge.com | Privacy | Disclosure | Unsubscribe

For inquiries, please do not reply to this email. Submit feedback via Contact Us. "PG&E" refers to Pacific Gas and Electric Company, a subsidiary of PG&E Corporation.
77 Beale St. San Francisco, CA 94105.

[1] While no proof of income is required for renewal, you may be asked to provide proof of household income at any time.

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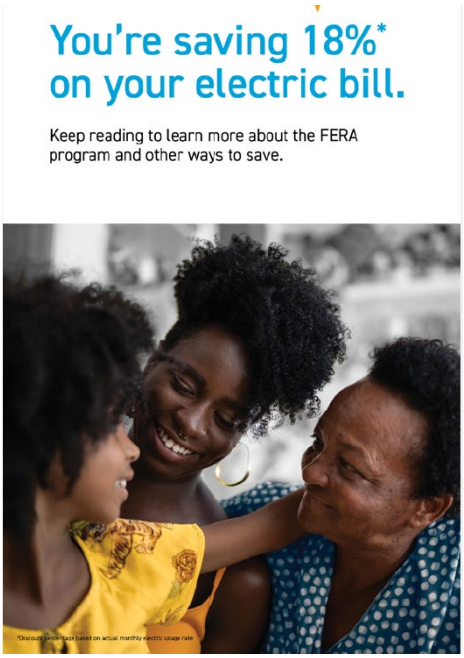
CIQ-0721-3465

FERA Welcome Direct Mail Sample



FERA Welcome Direct Mail Sample

Start saving 18% on your monthly electric bill

The Family Electric Rate Assistance (FERA) program offers a monthly discount for income-qualified households with three or more people.

See if you qualify

- The FERA discount is available for any household that meets eligibility guidelines—not just families.
- Check the chart below for household size and total current income of everyone living in your home.
- It's easy to apply and your information will be kept confidential.

FERA Income Guidelines (good until May 31, 2023)

Number of People in Household	Total Gross Annual Household Income*
1–2	Not Eligible
3	$46,061–$57,575
4	$55,501–$69,375
5	$64,941–$81,175
6	$74,381–$92,975
7	$83,821–$104,775
8	$93,261–$116,575
Each Additional Person, add	$9,440–$11,800

*Total gross annual household income includes all taxable and nontaxable revenues from all people living in the home.

Claim your 18% discount today!

Scan the code to apply.
Visit **pge.com/applyfera** or call **1-800-743-5000** for more details.

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2.23 CIQ-0223-5850

Empiece a ahorrar 18% en su factura mensual de electricidad

El programa Family Electric Rate Assistance (FERA) ofrece un descuento mensual a los hogares de tres o más personas que cumplan los requisitos de ingresos.

Vea si reúne los requisitos

- El descuento de FERA está a disposición de todos los hogares que cumplan los requisitos, no sólo de las familias.
- Consulte el siguiente cuadro para ver el número de integrantes del hogar y los ingresos actuales totales de todas las personas que viven en el hogar.
- Es fácil presentar su solicitud y su información será conservada en forma confidencial.

Requisitos de ingresos de FERA
(válidos hasta el 31 de mayo de 2023)

Número de personas en el hogar	Total de ingresos anuales brutos del hogar*
1–2	No reúne los requisitos
3	$46,061–$57,575
4	$55,501–$69,375
5	$64,941–$81,175
6	$74,381–$92,975
7	$83,821–$104,775
8	$93,261–$116,575
Por cada persona adicional, añada	$9,440–$11,800

*El total de ingresos anuales brutos del hogar incluye todos los ingresos sujetos a impuestos y libres de impuestos de todas las personas que viven en el hogar.

¡Solicite su descuento del 18% hoy mismo!

Escanee el código para hacer su solicitud. Visite **pge.com/applyfera** o llame al **1-800-743-5000** para obtener detalles adicionales.