



Joint IOUs Program Highlights

Low Income Oversight Board Meeting
September 5, 2024

National City, CA
Hybrid Meeting Format

PG&E 2024 Program Summary– As of July 2024



CARE	FERA	ESA Portfolio	
Enrollment: 1,374,810 Enrollment Rate: 96% Discounts: \$641,850,019 % Adm. Expenditure: 33%	Enrollment: 38,770 Enrollment Rate: 25% Discounts: \$12,030,377 % Adm. Expenditure: 49%	ESA Main kW Saved: 5,039 (171% Goal) KWh Saved: 15,564,305 (45% Goal) Therms Saved: 724,427 (52% Goal) Homes Treated: 29,550 (54% Goal) Expenditure: 54% authorized budget	Pilot Plus/Pilot Deep (PP/PD): - Increased installation capacity to 35 homes/month - Plan to expand to the Fresno area in Q3/Q4 N.MFWB Program Continuing ramp-up - Treated: 10,335 in-units - Enrolled: 241 MF properties - Audited: 287 WB projects

Additional Q2 Highlights

Increasing FERA Awareness and Identifying Barriers to Enrollment

- **FERA Influencer Marketing Test:** In May 2024, PG&E launched a FERA Influencer marketing test as a new tactic for increasing FERA awareness. Three influencers who live in PG&E’s territory created sponsored posts on social media during the campaign period, which concluded in July. A full campaign report out is expected in August.
- **FERA Enrollment Barriers Study:** The FERA Enrollment Barriers Study for PG&E’s service territory is underway. In July 2024, a FERA awareness survey was sent to 3,200 customers with a response rate of 10%. Survey results are currently being analyzed, and insights gathered will be applied to a second and final survey wave in September.

Tribal: Continuing Tribal Engagement to Increase Program Participation

- Through the Tribal Outreach Grant Program, the Q2 outreach efforts conducted by the grantees resulted in an additional 55 tribal members referred to the ESA program.

Supporting Customers with Past Due Utility Bills:

- **AMP:** (Arrearage Management Plan). While PG&E has enrolled nearly 90% of the eligible population into AMP, many customers fall off the program for missing payments, pointing to the challenges customers face in staying current on their bills. PG&E continues to conduct outbound calls to customers who miss an initial AMP payment.
- **REACH:** PG&E made an unprecedented \$55M contribution to REACH in 2024 to support customers with past due balances. YTD REACH has served over 33,000 customers and provided over \$27.5M in grants to reduce arrearages, with highest participation in the Central Valley (Fresno, San Joaquin and Kern Counties).

SCE 2024 Program Summary – As of July 2024

CARE

- Customers Enrolled: 1,344,010
- Enrollment Rate: 103%
- New Enrollments: 169,432

FERA

- Customers Enrolled: 31,836
- Enrollment Rate: 15%
- New Enrollments: 4,569

ESA

- Homes Treated: 22,655
- Energy Savings: 10,925,407 kWh

Homes Treated includes ESA and Building Electrification

Energy Savings includes ESA, MFWB, and Building Electrification

MFWB

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

Additional Highlights

Tribal

- As of July 2024, the SCE Tribal team participated in 23 events, fostering partnerships and collaboration with tribal communities. They regularly engage with tribes to promote SCE products and services.

AMP

- As of July 2024, AMP had 187,507 customers enrolled in the program, with a total of \$111M forgiven since program launch.

ESA

- ESA Main contractors are continuing to ramp up to be able to enroll more customers and install more measures.

SDG&E 2024 Program Summary – As of July 2024

CARE	FERA	ESA Main
<ul style="list-style-type: none"> Customers Enrolled: 319,269 Enrollment Rate: 110% New enrollments: 42,316 Admin Expenditures: 47% 	<ul style="list-style-type: none"> Customers Enrolled: 9,670 Enrollment Rate: 23% Newly Enrolled: 2,860 Admin Expenditures: 31% 	<ul style="list-style-type: none"> Homes Treated: 2,467 (74% YTD) kWh Saved: 535,025 (36% YTD) Therms Saved: 10,365 (25% YTD) Budget: 56%

Additional Highlights

The Southern Multifamily Whole Building (MFWB) (SDG&E, SCE & SoCalGas): As of July, The Southern MFWB Program has treated 1,060 in-unit projects, resulting in 56,748 kWh and 10,209 Therms saved. The program completed 249 whole building enrollments and completed 210 property assessments. Although no completed Whole Building Projects have been reported, there are 4 projects completed that are pending invoicing. The 249 enrolled properties account for a total 26,332 potential in-units enrolled for treatment. The Program continues to build a robust pipeline of 1,207 qualified whole building leads across the southern IOUs service territories.

Pilot Plus/ Pilot Deep: Contract completed with Implementer (Maroma) in January 2024. First email campaign to 500 eligible customers sent in April of 2024, 43 leads have been generated thus far. SDG&E will continue outreach efforts through email campaigns for enrollment in Q3 2024.

Tribal Grants/Outreach: SDG&E has offered mini-grants to 7 tribes. Three have successfully completed financial documents and have received the grants. As of July, the remaining 4 tribes have not responded or provided the necessary financial documents. SDG&E is continuing to find ways to engage and promote the mini-grant opportunity. To date, SDG&E has participated in 14 Tribal events including community resource fairs, earth fairs, health, and safety fairs where we provided program education, resources, one-on-one customer support, and direct program enrollment support.

Arrearage Forgiveness: As of July 2024, there are 22,497 AMP customers with total arrearages of \$47.5M. 11,461 customers have successfully completed the program with a total of \$46.5M forgiven. In 2024, SDG&E's Neighbor-to-Neighbor program assisted 893 customers with pledge dollar totals of \$269,365 to assist customers with arrearages.

SoCalGas Program Summary – As of July 2024

CARE

- Customers Enrolled: 1,765,889
- Enrollment Rate: 109%
- Newly Enrolled Customers: 195,639

ESA Main Program

- Therms Saved : 730,328; 61% YTD
Compared to July 2023 YTD: 447,240 therms saved
- % Expenditure: 41% YTD
- Homes Treated: 25,782; 37% YTD

MFWB/PPPD

- SDGE will provide the update on Southern MFWB on behalf of SoCalGas.
- SCE will provide the update on PP/PD on behalf of SoCalGas

Additional Highlights

Main ESA Program

- Customer affordability continues to be a core focus of program; High therm saving measures introduced in late 2023, have significantly increased avg. therms saved per home.
- All 12 contractors hit their therm savings goal for the first award period and will receive their Performance Based Incentive.
- SoCalGas introduced three new fees and increased compensation on 17 measures in July, and is closely monitoring budget impacts and planning to exhaust entire program year budget.

Disconnections/AMP

- 67,419 customers enrolled in AMP (January – 7/31/24)
- Customer “Missed bill payment” text reminders will deploy in Q4 to help improve customer retention.

Tribal

- Through July 31, SoCalGas has met with 6 Tribes (4 Federally Recognized and 2 Non-Federally Recognized) and established a point of contact for the Low-Income programs.
- Continue to enhance outreach strategy to help navigate and increase engagement within Tribal communities through community-based organizations working in Tribal communities and participation in events serving Tribal communities. Meetings are in being coordinated with organizations for August/September time frame.



Joint IOUs Energy Savings Assistance Program Contractor Funding & Solicitations

ESA Programs Joint IOUs Solicitations Schedule

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

CAEECC-ESA Program: www.caeccc.org/energy-savings-assist-programs

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

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

PG&E: [Solicitations for PG&E Energy Savings Assistance Programs](#)

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

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

IOU	Program	RFQ Release (2/26)	Bidder Conference (2/26)	RFQ Release (3/21)	Bid Evaluation and Scoring	Contract Negotiations	Contract Awards	Open to Participation	System Launch (4/16/21)
SoCal Gas	NEW: ESA Single Family Core Program - Outreach and Marketing	RFQ Release (2/26)	Bidder Conference (2/26)	RFQ Release (3/21)	Bid Evaluation and Scoring	Contract Negotiations	Contract Awards	Open to Participation	
	Main ESA (Basic/Plus) Program (delivery of core single-family enhance services)								
PG&E	Customer Experience Technology Platform and Customer Online Audit	System Launch (4/16/21)							
	Main ESA (Basic/Plus) Program								
	Multifamily Whole Building Program								
	Statewide Multifamily Central Portal								
	Build Materials								
	ESA Pilot Plus/Pilot Deep								
	Evaluation for ESA Pilot Plus/Pilot Deep			RFQ Release (3/23/21)	Bidder Review of RFQ Submittal (3/23/21) and Proposal Prep	RFQ Proposal Due (3/26/21) / Mark and Evaluation	Contract Negotiations	Contract Awards/Resubmits	
SDG&E	Main ESA (Basic/Plus) Program								
	Main ESA (Basic/Plus) Program H2O2 and Water Heater Repair and Replacements***					RFQ	Award/Resubmits	Contract Negotiations	Contract Awards/Resubmits
	ESA Plus/Deep Pilot								
	ESA Plus/Deep Pilot 2.0			Pilot Kick-off	Open to Participation				
	Multifamily Whole Building Program								

ESA Update On Contractor Funding

January – July 2024

Utility	Funding Issue	Impact
PG&E	No issues to report.	None
SCE	No issues to report. SCE spent 45% of its ESA Main budget as of July. The monthly repayments for the Advanced Payments offered to eligible ESA contractors will start in September.	Advance payments are intended to support the contractors in their continued efforts to ramp up ESA program operations.
SDG&E	SDG&E’s MFWB Program is facing difficulties due to subcontractors adapting to the new program structure, pricing, and the contractual compensation holdback linked to performance. <ul style="list-style-type: none"> • ESA Main budget spend is 54% • ESA MFWB budget (SDG&E, SCE and SoCalGas) spend is 6% • ESA Pilot Plus and Pilot Deep annual budget spend is at 15% 	SDG&E and RHA executed a contract amendment on June 28, 2024 for the Southern MFWB Program that addressed the challenges raised by subcontractors around compensation. The Program is expecting to see an increase in in-unit treatments post contract amendment.
SoCalGas	On March 6, 2024, SoCalGas Contractors submitted a letter (Contractor Letter) to Commissioners and LIOB members requesting their prompt intervention in this matter to (1) restore the ESA Program’s effectiveness in the low-income communities they serve and (2) allow contractors to remain in business for continued ESA Program implementation.	SoCalGas continues performing a staged approach to review compensation and consider additional adjustments. In June, SoCalGas completed its process to evaluate changes to compensation of individual measures. This resulted in the addition of three new fees and the compensation increase of 17 measures in mid-July. SoCalGas will continue to monitor budget spend for the possibility of further compensation increases and to exhaust the allocated program budget.



Joint IOUs Report of the CARE, FERA and ESA Programs

CARE Program Budgets and Enrollment

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

January – July 2024 CARE Program Updates*

Authorized 2024 Program Budgets and Expenditures				
Utility	2024 Budget	Expenditures	%	Rate Discounts
PG&E	\$14,070,600	\$4,651,200	33%	\$641,850,019
SCE	\$9,002,553	\$4,263,494	47%	\$445,245,762
SDG&E	\$7,013,368	\$3,279,157	47%	\$120,824,544
SoCalGas	\$10,465,069	\$4,755,274	45%	\$114,176,901
Total	\$40,551,590	\$16,949,125		\$1,322,097,227

2024 Enrollment						
Utility	Total Residential Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled**	Enrollment Rate	Newly Enrolled Customers
PG&E	5,703,458	1,436,345	25%	1,374,810	96%	175,725
SCE	4,616,791	1,302,665	28%	1,344,010	103%	169,432
SDG&E	1,419,439	289,930	20%	319,269	110%	42,316
SoCalGas	5,773,515	1,639,673	28%	1,765,889	108%	195,639
Total	17,513,203	4,668,613		4,803,978		583,112

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

** Total households enrolled includes sub-metered households.



CARE Program *SCE Enrollment map*



County	Enrollment Rate*
Kings	123%
San Bernardino	112%
Riverside	111%
Tulare	111%
Los Angeles	106%
Kern	91%
Orange	90%
Ventura	86%
Inyo	66%
Santa Barbara	51%
Mono	36%

*Represents the enrollment rates for all SCE counties effective July 31, 2024, and excludes counties with less than 1,000 estimated eligible households

CARE Program *SDG&E Enrollment Map*

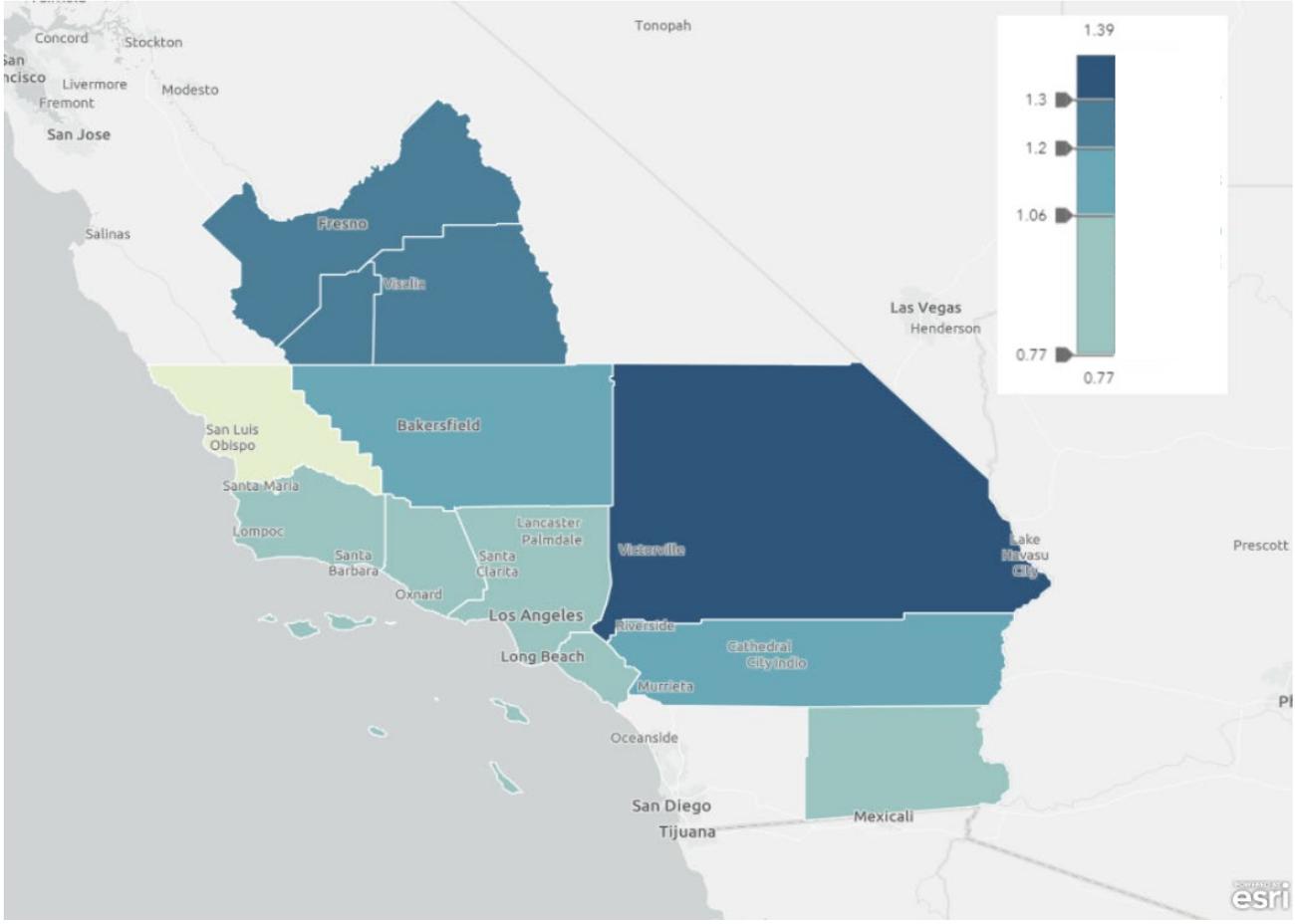


Zip codes with lowest enrollment rates

City	Enrollment Rate*
Rancho Santa Fe	17%
Coronado	36%
La Jolla	42%
Del Mar	44%
Solana Beach	46%
Cardiff	53%

*Represents SDG&E zip codes with the lowest enrollment rates according to the eligible population as of July 31, 2024.

CARE Program *SoCalGas Enrollment map*



County	Enrollment Rate *
San Bernardino	131%
Kings	130%
Tulare	130%
Fresno	126%
Kern	126%
Riverside	115%
Los Angeles	104%
Ventura	99%
Orange	97%
Imperial	94%
Santa Barbara	91%
San Luis Obispo	74%

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

FERA Program Budgets and Enrollment

January – July 2024 FERA Program Updates*

Authorized 2024 Program Budgets Expenditures				
Utility	2024 Budget	Expenditures	%	Rate Discounts
PG&E	\$2,929,000	\$1,435,143	49%	\$12,030,377
SCE	\$1,451,640	\$266,076	18%	\$7,738,215
SDG&E	\$621,815	\$191,467	31%	\$1,985,993
Total	\$5,002,455	\$1,892,686		\$21,754,585

2024 Enrollment						
Utility	Total Residential Electric Customers	Estimated Eligible Customers	Eligible Rate	Customers Enrolled	Enrollment Rate	Newly Enrolled Customers
PG&E	4,843,613	156,547	3%	38,770	25%	7,553
SCE	4,616,791	211,756	5%	31,836	15%	4,569
SDG&E	1,419,439	41,374	3%	9,670	23%	2,860
Total	10,879,843	409,677		80,276		14,982

*Authorized budgets pursuant to D.21-06-015. Activity through July 31, 2024, as reported in the IOU ESA-CARE-FERA Monthly Reports filed August 21, 2024.

FERA Program *SCE Enrollment map*



County	Enrollment Rate*
Riverside	19%
Orange	16%
San Bernardino	15%
Ventura	15%
Tulare	15%
Kings	15%
Los Angeles	14%
Kern	14%
Santa Barbara	10%

*Represents the enrollment rates for all SCE counties effective July 31, 2024, and excludes counties with less than 1,000 estimated eligible households

FERA Program *SDG&E Enrollment Map*



Zip codes with lowest enrollment	
City	Enrollment Rate*
La Jolla	11%
Coronado	13%
Bonsall	13%
Dana Point	13%
Fallbrook	13%
Julian	16%
Pala	16%
Laguna Beach	18%

*Represents SDG&E zip codes with the lowest enrollment rates according to the eligible population as of July 31, 2024.

Energy Savings Assistance Program Budget Update

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

2024 ESA Program Budget Updates January – July 2024*

Utility	Authorized Budget ¹	YTD Expenditures ²	%
PG&E	\$223,985,307	\$ 81,182,378	36%
SCE ³	\$96,282,711	\$ 29,228,544	30%
SDG&E ⁴	\$30,210,203	\$ 12,430,758	41%
SoCalGas	\$122,814,843	\$ 40,490,250	33%
Total	\$473,293,064	\$ 163,331,930	35%

* Activity through July 31, 2024, as reported in the IOU ESA-CARE-FERA Monthly Reports filed August 21, 2024.

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

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

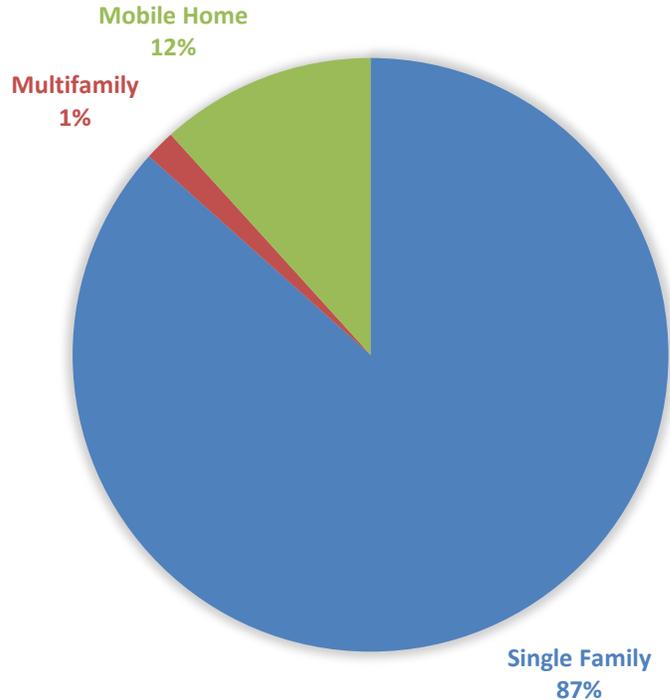
³ Includes Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Unspent Funds, Per SCE AL 5106-E.

⁴ Includes Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Unspent Funds, Per SDG&E AL 4285-E.



Energy Savings Assistance Program – Program Participation Update

STATEWIDE PARTICIPATION
(% TOTAL BY HOUSING TYPE)



2024 Households Treated
January – July 2024

2024 Households Treated ¹				
Utility	Est. HH Treated Target	Total	Total as % of 2024 Treated	Total as % of Eligible ESA HH
PG&E	54,876	29,550	54%	1.59%
SCE	64,922	22,655	35%	1.34%
SDG&E	14,188	3,491	25%	1.20%
SoCalGas	69,837	25,782	37%	1.22%
Total	203,823	81,478		

¹ Activity through July 31, 2024, as reported in the IOU ESA-CARE-FERA Monthly Reports filed August 21, 2024.



Energy Savings Assistance Program Energy Savings Update

2024 Energy Savings Targets January – July 2024

2024 Annual Savings for YTD Treatment ¹			Estimated Annual HH Usage for HH Treated YTD ²		Savings as % of Average HH Usage		Annual Program Savings Goals ³	
Utility	ESA kWh	ESA Therms	kWh	therms	kWh	therms	kWh	therms
PG&E	17,653,623	835,430	166,307,400	10,283,400	11%	8%	34,253,799	1,393,298
SCE ⁴	10,925,407	N/A	268,597,680	N/A	4%	N/A	31,762,240	383,213
SDG&E	551,098	13,463	14,829,768	904,867	4%	1.5%	2,769,999	115,389
SoCalGas ⁵	N/A	737,439	N/A	8,625,626	N/A	8.5%	N/A	1,435,220
TOTAL	29,130,128	1,586,332	453,066,384	19,813,893			68,786,038	3,327,120

¹ Activity through July 31, 2024, as reported in the IOU ESA-CARE-FERA Monthly Reports filed August 21, 2024.

² Derived from average CARE Customers Usage for PY 2023 (Annual Report CARE Table 9) multiplied by January 1- July 2024 homes treated and annualized.

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

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

⁵ Values include Main ESA Program and MFWB



Energy Savings Assistance Program Multifamily Update

January – July 2024 MULTIFAMILY UPDATES

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

- **PG&E:** As of July 2024, PG&E's SPOC program has referred 442 properties to 65 programs including LIWP, SOMAH, BayREN BAMBE, TECH, local water district programs, etc, through July; and 42 referrals were converted to applications. PG&E's SPOC web tool had referred 504 customers to other program websites as of July 2024. PG&E's SPOC continues to engage with other MF programs to stay up to date on latest program updates and offerings.
- **SCE:** By the end of July, SCE SPOC provided RHA 59 property leads, 1,087 property prospects, 541 residential leads, and 12 SOMAH leads for possible participation in MFWB. SCE's SPOC continues to refer properties who refused or were ineligible for participation in MFWB to other programs. This includes providing program information and providing direct links to apply for various programs: SOMAH, Charge Ready, SGIP, LIWP, etc.
- **SDG&E:** By end of July, SDG&E's SPOC referred 413 MF properties to the ESA MFWB program and continues to leverage programs including but not limited to SOMAH, RZNET, and OBF. SPOC continues to outreach to local and nonprofit community organizations to engage with hard-to-reach communities and the affordable housing community. SPOC continues to provide additional multifamily program information to MFWB ineligible or not interested property owners. SPOC established a relationship with the SD County Water Authority and City of Chula Vista and continues to build city government relationships to encourage participation in utility MF programs.
- **SoCalGas:** SoCalGas SPOCs have delivered 347 properties which represent 67% of all leads. 41,734 units are represented by 347 property leads which is 93% of the total units. SoCalGas continues to provide quality leads along with enrollment documentation and customer support. SoCalGas SPOCs provide assessment feedback and work with RHA and the customer to assist when requested. However, the implementer continues to struggle with completing assessments promptly which causes to have a twelve-month or longer delay.

MFWB Program:

- **Northern MFWB (PG&E):** As of July 2024, PG&E has treated 10,335 in-units and enrolled 241 MF properties and audited 187 whole building projects. PG&E has reserved 28 whole building projects as of July, and three (3) projects completed construction in July and are anticipated to receive incentive payment in Q3 this year.
- **Southern MFWB (SDG&E, SCE & SoCalGas):** As of July, The Southern MFWB Program has treated 1,060 in-unit projects, resulting in 56,748 kWh and 10,209 Therms saved. Although no completed Whole Building Projects have been reported, there are 4 projects completed that are pending invoicing. The Program continues to build a robust pipeline of 1,207 qualified whole building leads across the southern IOUs service territories. The program's leads-to-enrollment conversion rate is 21%, with most enrolled properties progressing to an assessment (84%). A small proportion (5%) of properties opted out of the MFWB Program, while 2% of assessed properties have completed CAM/WB construction (pending invoicing).

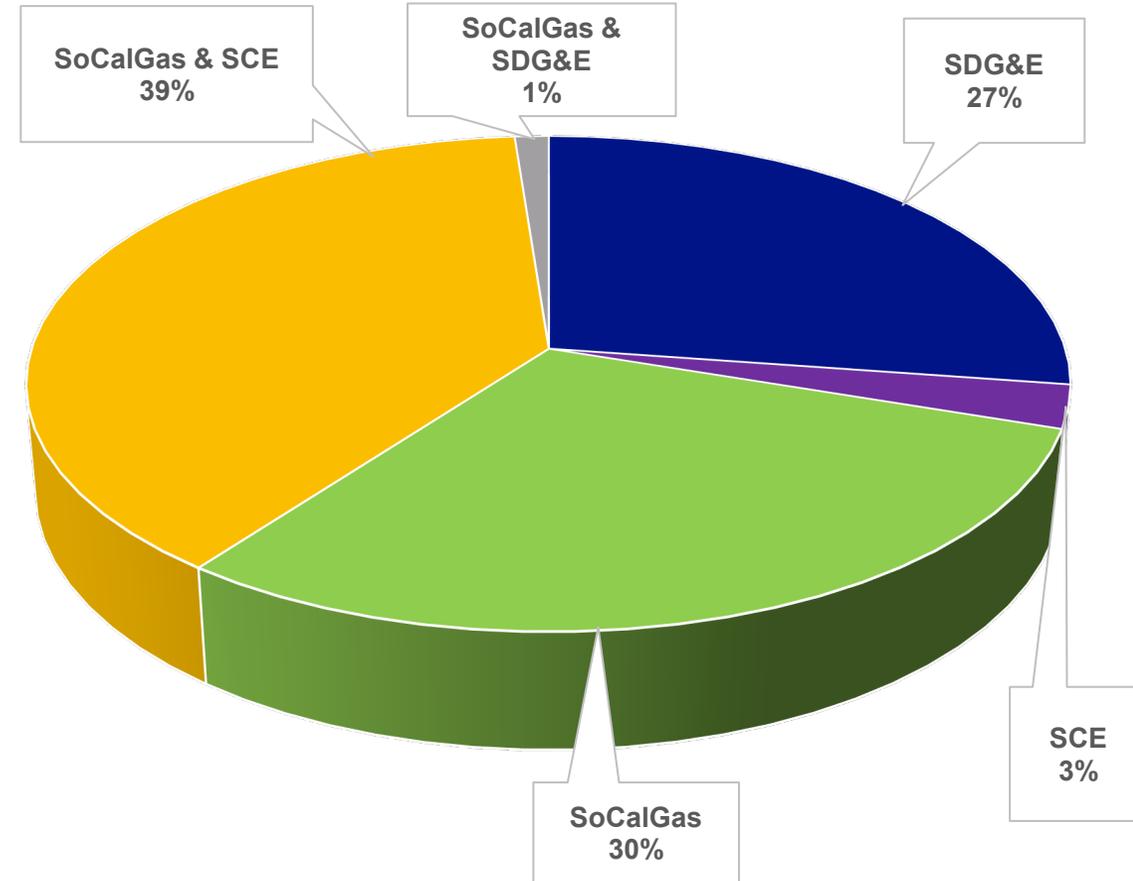
Southern MFWB Pipeline Results (Jul 2023 – July 2024)

Program Performance:

- Completed 249 Whole Building Enrollments
 - 21% of leads convert to enrollment
- Completed 210 Whole Building Assessments
 - 84% of enrollments convert to assessments
- 26,332 In-Units enrolled
 - 85% of In-Units enrolled are assigned to subcontractors

IOU	Enrollment	Assessment	WB Projects Completed	In-Units Invoiced
SDG&E	68	64	0	523
SCE	7	6	0	0
SCG	75	56	0	256
Joint Enrollments:				
SCG/SCE	96	81	0	281
SCG/SDG&E	3	3	0	0
Total	249	210	0	1,060

Southern MFWB Enrollments by IOU



Tribal Community Outreach Update – PG&E



Compliance/Outreach Activities as of July 2024

PG&E continued its efforts in implementing the 2023/2024 Tribal Outreach Grant program.

In Q2 2024, two Tribal grantees provided PG&E with a list of 55 additional tribal members whom the ESA contractors could potentially start making home visits with and install measures. However, only 13 secured an appointment with an ESA contractor due to various reasons.

In July 2024, PG&E continued its support of the first-year ESA Tribal Outreach Grant program and held the final meeting with the tribal grantees to discuss the successes and challenges of the first full-year grant program. Some recommendations were provided, and PG&E will be looking into implementing some of these recommendations.

PG&E's and ESA tribal outreach efforts included:

- May 2024
 - PG&E held a Wildfire Safety Webinar where more than 150 Tribal leaders were in attendance.
 - The 2nd Annual Missing and Murdered Indigenous Women Gathering took place, and 148 Native Americans took part in keynote presentations and community resources to assist with growing energy cost inflation and obtain information on services. PG&E had a booth where information for the REACH, CARE/FERA, and Medical Baseline programs was available.
- June 2024
 - The North Fork Rancheria Gathering hosted 157 Native Americans who attended the Earth Day event, with 15 local resource booths including a PG&E booth which had resources to assist qualified families obtain discounts on energy costs.
 - PG&E continued its efforts to support tribes within its territory by sending a letter providing information on PG&E bill assistance and other available customer resources. From this outreach, several tribes requested additional materials to be distributed to their tribe members.
- July 2024
 - PG&E a newsletter was sent to all tribes, Tribal Housing Authority offices, TANF agencies, and health centers that provided information on PG&E bill assistance and other customer resources.

Beyond the ESA program's tribal outreach efforts, PG&E's centralized tribal team, which coordinates all of PG&E's tribal communications, continued their ongoing outreach efforts to tribes across the service territory on a variety of topics related to energy use, resiliency, safety, and community initiatives.

Successes/Challenges

Challenges: Communication between ESA contractors and Tribal Members, as ESA contractors are unable to get a response from some tribal members even when using a specific script and attempting to reach tribal members multiple times.

Successes: The two remaining 2023 Tribal Outreach Grant participants continued their outreach efforts to their members. Because of these efforts, PG&E received an additional 13 tribe members who were referred to the ESA program implementers and are going through the ESA process.

PG&E Tribal Community Outreach Update



Outreach Activities	Number of Participating Tribes*
Tribes completed ESA Meet & Confer**	17
Tribes requested outreach materials or applications	3
Federally Recognized Tribes who have not accepted offer to Meet and Confer	0
Non-Federally Recognized Tribes who participated in Meet & Confer	0
Tribes and Housing Authority sites involved in Focused Project/ESA	2
Partnership offer on Tribal Lands	102
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	38
Housing Authority and TANF offices who participated in Meet and Confer	1

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

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

PG&E Tribal Community Outreach Update



Energy Savings Assistance Program Table 7 - Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions *											
Pacific Gas and Electric Company											
Through July 31, 2024											
ESA Main (SF, MH)											
Customer Segments	# of Households Eligible [1]	# of Households Treated [2]	Enrollment Rate = (C/B)	# of Households Contacted [3]	Rate of Uptake = (C/E) [19]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures) [4][21]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only) [5][21]	Avg. Peak Demand Savings (kW) Per Treated Household [21]	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures) [4][21]	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only) [5][21]	Avg. Cost Per Treated Households [21]
Tribal [20]	1,911	80	4%	99	81%	483.35	483.35	0	17.61	18.83	\$ 1,726

SCE Tribal Community Outreach Update

Outreach Activities

- **Ongoing Outreach:**
 - SCE continues to collaborate with Tribal leaders in service territory, offering mini grants & supporting tribal activities. The goal is to empower Tribal leaders to disseminate information and increase enrollments and installations within their communities.
 - Maintained at least two tribal contacts per tribe
- **Q2 Outreach:**
 - The SCE Tribal team participates in key community engagements, including the monthly Morongo Confab, Tribal Emergency Managers' meetings, and the American Indian Chamber of Commerce Expo.
 - In July, SCE supported the Morongo TANF Back to School Resource Fair, benefiting low-income families by providing valuable information on assistance programs.

Successes and Challenges

- **Successes:**
 - Bridgeport Indian Colony and Soboba Band of Luiseno Indians have signed mini-grant agreements.
 - As of July 2024, the SCE tribal team actively engaged in 23 events.
- **Challenges:**
 - Identifying and building relationships with non-federally recognized tribes.

SCE Tribal Community Landscape

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

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

SCE Tribal Segment Reporting



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

ESA Main (SF, MH)

Customer Segments	# of Households Eligible ^[1]	# of Households Treated ^[2]	Enrollment Rate = (C/B)	# of Households Contacted ^[3]	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households
Tribal	8,832	104	1.18%	35	297%	477	477	0.070	7.22	7.75	\$ 806

SDG&E Tribal Community Outreach Update

OUTREACH ACTIVITIES (in accordance with D.21-06-015)	SUCCESSSES & CHALLENGES
<ul style="list-style-type: none"> • Tribal Relations Manager has contacted all Tribes SDG&E serves to exchange information. <ul style="list-style-type: none"> • In 2024, has met with 17 tribal nations. • Seven tribes were awarded mini-grants. Three tribes have completed their financial documents. Three received payment as of July 2024. Two additional tribes have expressed interest in grants and are working on gathering financial documents. • Hosted fourteen Community Resource Fairs in 2024 and promoted low income programs, discussed topics such as Bill Assistance, Medical Baseline, Wildfire Safety, PSPS, AFN, provided direct enrollment support, and provided 1x1 customer assistance. • Continued partnerships with two Tribal CBOs: <ul style="list-style-type: none"> • Southern California Tribal Chairmen’s Association (SCTCA) <ul style="list-style-type: none"> • Total Outreach Activities YTD: 5 • Total Reach: 6,100 • Southern California American Indian Resource Center (SCAIR) <ul style="list-style-type: none"> • Total Outreach Activities YTD: 29 • Total Reach: 16,400 	<ul style="list-style-type: none"> • Success: SDG&E continues to be proactive in promoting low-income programs by increasing its reach beyond Tribal elected leaders and working with staff as well as organizations serving reservations such health and emergency services. • Success: Through ongoing CBO partnerships, SDG&E staff has been invited to participate in SCAIR and SCTCA outreach events to promote CARE, FERA, and ESA. • Success: Partnership with Southern Indian Health Council and Indian Health Council has increased SDG&E presence at smaller family events such as SDG&E's participation in the Healthy Families series hosted by various remote tribal nations. • Challenge: Engaging non-federally recognized tribes. • Challenge: Tribes are overwhelmed with requests and have limited resources, so it's important to meet them where they are at. • Challenge: Mini-grants require Tribes to complete tax paperwork before payment can be issued. SDG&E has established streamlined process.

SDG&E Tribal Community Landscape

- SDG&E has 17 Federally recognized and 3 non-Federally recognized Tribes in its service territory.
 - Of the 17 Federally recognized Tribes, **16 receive service*** provided by SDG&E.

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

Non-Federally Recognized Tribes in SDG&E's Service Territory	
Juaneno Band of Mission Indians	San Luis Rey Band of Mission Indian
Kwaaymii	(row intentionally left blank)

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

SDG&E Tribal Segment Reporting*



Energy Savings Assistance Program Table 7 - Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions *
San Diego Gas & Electric Company
July 2024

ESA Main (SF, MH)											
Customer Segments	# of Households Eligible [1]	# of Households Treated [2]	Enrollment Rate = (C/B)	# of Households Contacted [3]	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures) [4]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only) [5]	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures) [4]	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only) [5]	Avg. Cost Per Treated Households
Tribal [18]	21,716	2	0%	156	1%	183.21	183.21	0	-	-	\$ 589

[18] This data captures tribal households located on federally-recognized tribes whose trust lands are identified in the Bureau of Indian Affairs, and also includes ESA participants from non federally-recognized tribes or households that self-identified as Native American.

*As reported in SDG&E's Amended Low-Income Monthly Report filed on August 2024.

SoCalGas Tribal Community Outreach Update

Outreach Activities	Successes & Challenges
<p>Activities are in accordance with D.21-06-015</p> <ul style="list-style-type: none">• SoCalGas continues communication with Tribes within SoCalGas' service area.<ul style="list-style-type: none">• SoCalGas reaches out to federally-recognized and non-federally recognized Tribes in its service area via in person meetings, emails, phone calls and at community events.• SoCalGas is continuing to build relationships with Tribes and establishing and/or maintaining a Tribal contact for each Tribe in its service area.• SoCalGas is enhancing its outreach strategy to help navigate and increase engagement within Tribal communities<ul style="list-style-type: none">• Through July 31, SoCalGas has completed meetings with 6 Tribes in service area. SoCalGas is meeting with each tribe and establishing a point of contact for Low Income decision programs.	<ul style="list-style-type: none">• Success: Through July 31, SoCalGas participated in 110 events in Tribal Communities.• Working with Success: Continuing to work with Tribes, as well as Community Based Organizations specific to Tribal communities to establish memos of understanding to assist in providing information on programs to the community.• Challenge: Identifying non-federally recognized Tribes.

SoCalGas Tribal Community Landscape

- SoCalGas has 19 federally-recognized Tribes in its service territory.
 - Of the 19 Tribes, **10 have natural gas service*** provided by SoCalGas.
 - These 10 tribes have a total of 16,689 natural gas meters of which 93% are on leased land – with no certainty that the land occupant is a Tribal member.

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

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

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

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

SoCalGas Tribal Segment Reporting

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

Southern California Gas Company
July 2024

ESA Main (SF, MH)											
Customer Segments	# of Households Eligible* [1]	# of Households Treated [17]	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Savings (kWh) Per Treated Household (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Household (Energy Saving Measures Only)	Avg. Peak Demand Energy Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Household (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Household (Energy Saving Measures Only)	Avg. Cost Per Treated Household
Location											
Tribal [8]	4,445	24	57%	145	15.9%				16.6	16.6	560.5

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

PSPS Ongoing Activities





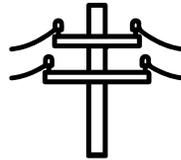
2024 PSPS Activations

In 2024, PG&E activated its Emergency Response Center (EOC) for PSPS events on July 2, July 5*, and July 20 due to weather conditions that could have potentially caused a wildfire.



**Customers
Impacted**

~2,055



**Miles of Powerlines
Patrolled****

~700



**Community
Resource Centers**

11 open with over
1,460 customer visits

*Although PG&E activated our EOC for a potential PSPS, no customers were de-energized between July 5-6, 2024.

**Approximate data as of December 2023.

Community Resource Centers (CRCs)

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

Customer Resources:

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



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

**Indoor locations only*

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

Resources for Customers with Access and Functional Needs

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

Medical Baseline (MBL) Program

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

 Customers can learn more at pge.com/mbi.

Self Identified Vulnerable Customer Status

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

 Customers can learn more at pge.com/vcstatus.

We provide additional notifications to our most vulnerable customers.

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

i Apply to the Medical Baseline Program at: pge.com/medicalbaseline.

i Self-certify for Vulnerable Customer status at: pge.com/vcstatus.



2024 SCE PSPS OVERVIEW



Jan – July 2024

Statistics	Activations	Customer Interruptions	Circuit Interruptions	Customer Minutes of Interruption
Jan – July 2024	3*	0	0	N/A

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

MITIGATING IMPACTS OF PSPS -SCE

Customer Care Programs Update as of July



2024 COMMUNITY CARE RESOURCES

68 COMMUNITY RESOURCE CENTERS (CRC)

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

8 COMMUNITY CREW VEHICLES (CCV)

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

8 RESILIENCY ZONE SITES

Enables backup power generation at certain essential sites in remote communities



9 RESILIENT CRCs

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

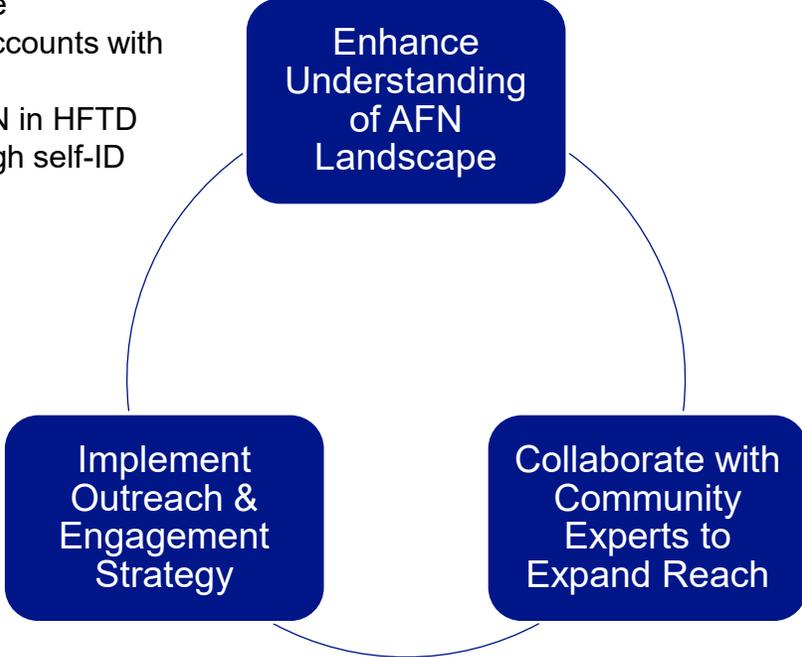
The CCBB program offers eligible customers a free portable battery and solar panel to power medical devices during PSPS events. The program expanded in 2022, reaching additional customers, with over 16k batteries delivered since its inception. Customers in HFTDs can receive a \$150 rebate for portable batteries, a \$200 rebate for portable generators, and a \$600 rebate for portable generators if enrolled in CARE/FERA or Medical Baseline Allowance. The Statewide Self-Generation Incentive Program (SGIP) is also available.

- Hosted 156 educational events through the Disability Disaster Access and Resources to date in collaboration with the California Foundation of Independent Living Centers (CFILC) to provide comprehensive assistance to customers with disabilities. This support extends before, during, and after PSPS.
- Leveraging Self-ID survey to message 80k individuals about PSPS resources and programs.
- Re-launched the Prepare for Power Down Website which is a Joint IOU website built to streamline and centralize PSPS resources for customers statewide.
- More than 70 Community Based Organizations (CBO's) onboarded to support customers with AFN.
- Launched the Accessible Hazards Alert System that hosts notifications and program information in American Sign Language and other accessible formats.
- To date 2024, CCBB has deployed 1,656 batteries and distributed 16,013 free portable backup batteries since program inception.
- Implemented the In-Event Battery Loan Pilot in June 2023 and assisted 35 eligible AFN customers during PSPS events with a battery loan.
- To date 2024, Granted 81 Portable Power Station Rebates and 10 Portable Generator Rebates. Year to date 1,232 rebates issued.

Mitigation of Impacts for Individuals with AFN



- Mapped AFN customers across database
 - ~33% total residential customer accounts with AFN
 - ~11% customer accounts with AFN in HFTD
 - ~9,800 customers identified through self-ID



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

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

15 Unique Identifiers

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

SDG&E PSPS Support Services



Community Resource Centers

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



Tribal Partnerships

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



Centralized Resource Hub

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



Pantry & Warm Food

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



Transportation

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



Hotel Stays

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



Wellness Checks

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



Community Engagement

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



Joint IOUs Unspent Funds for Energy Savings Assistance Program

PG&E's Unspent ESA Program Funds



Total Remaining Unspent Funds (\$ in millions)	
Remaining unspent funds as of December 31, 2023 ^{[1][2]}	\$84.70
2024 Revenues Collected (Jan - Jul)	+ \$90.54
2024 Expenses (Jan - Jul)	- \$87.41
2024 Accrued Interest (Jan - Jul)	<u>+ \$2.83</u>
Total remaining unspent funds as of July 31, 2024 ^[3]	\$91.37

1. Committed unspent fund carry forward to 2024 according to fund shifting rules for MF CAM, SPOC, Pilots, Studies, Pilot Plus and Pilot Deep, and SASH/MASH. \$26M of unspent fund is being used to off-set 2024 budget revenue requirement.
2. Includes \$9.6M of remaining SASH and MASH Unused Administrative and Incentive Program Funds in the CSIBA was authorized to transfer to fund ESA programs per AL 7028-E, approved 11/02/23.
3. \$52.2M in unspent fund is carried forward from 2023 to 2024 for MFWB, SPOC, Pilots, Studies, Pilot Plus and Pilot Deep, and SASH/MASH. Remaining \$39.1M will either carry forward and/or being used to off-set future collection according to fund shifting rules.

SCE's Unspent Funds for ESA Program

Total Remaining Unspent Funds (\$M)	
Unspent Funds through 12/31/23 ^{[1][2]}	\$62.97
2024 Revenue Collected (Jan – Jul)	\$53.08
2024 Expenses (Jan –Jul)	\$(41.62)
2024 Accrued Interest (Jan- Jul)	\$2.22
Total Unspent Funds through 07/31/2024	\$76.65

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

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

SDG&E's Unspent Funds for ESA Program



Total Remaining Unspent Funds (\$ in millions) [1]	
Unspent funds available in Balancing Account as of December 31, 2023 [2]	\$ 27.53
Remaining unspent & uncommitted funds used to offset 2024 revenue requirement [3]	\$ (6.25)
Revenues collected through YTD July 2024	\$ 8.61
Expenses incurred through YTD July 2024	\$ (12.16)
Total remaining unspent funds as of July 31, 2024	\$ 17.73
Remaining committed funds as of December 31, 2023 [4]	\$ (10.40)
Total remaining unspent & uncommitted funds as of July 31, 2024 [5]	\$ 7.33

1. Unspent funds are only available for ESA activities.

2. The amount shown is SDG&E's unspent funds available in the balancing account as of December 31, 2023, net of SCE & SCG funding for ESA MFWB.

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

4. Remaining committed funds consist of \$2.15 million for ESA Main, \$5.11 million for ESA MFWB, \$2.82 million for ESA Pilot Plus & Pilot Deep, and \$.32 million in SASH/MASH funds. SDG&E filed Advice Letter 4285-E for disposal of unspent funds from the SASH and MASH programs to the ESA Program on October 31, 2023. The AL was approved on November 30, 2023.

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

SoCalGas Unspent/Uncommitted Funds for ESA



SoCalGas Remaining Unspent Funds

Total Remaining Unspent Funds (\$M)	
Remaining 2009-2016 Unspent Funds [1]	\$125.15
2017-2020 Revenues Collected	\$491.69
2017-2020 Total Expenses [2]	\$394.62
2017-2020 Unspent Funds [1]	\$97.07
Total Remaining Unspent Funds through PY 2020 [1]	\$222.22
2021 – 2023 Revenues Collected	\$84.09
2021 – 2023 Total Expenses [2]	\$304.16
Total Remaining Unspent Funds through PY 2023 [1]	\$2.15
2024 Revenues Collected	\$63.27
2024 Total Expenses [3]	\$40.49
Total Remaining Unspent Funds as of 7/31/2024 [1]	\$24.93
<u>Footnotes</u>	

[1] Unspent Funds related to Revenues Collected

[2] Total Expenses from Annual Reports

[3] Total Expenses from July 2024’s Monthly Report - Summary Table

Notes:

- Unspent funds can only be used for ESA Program activities or returned to ratepayers.



State of Disconnections and Arrearage Management Plans (AMP)

PG&E Disconnections Status and AMP – Through July 2024

Arrearage Management Plan (AMP) ^[1]

- Number of customers enrolled since launch : 409k
 - Gross percentage of eligible households enrolled: 89%
 - Number successfully completed 12-month enrollment since program launched in Feb. 2021: 60k
 - Percentage of total enrollments since launch that have successfully completed AMP: 16%^[2]
- Average length of participation for customers who do not finish the 12 months is three months.
- Total amount forgiven since program launch : \$279M

AMP Case Management

AMP Missed Payment Notifications

- PG&E continues to contact customers upon their first missed payment of current billing charges to ensure they are aware of the requirements to remain on AMP and to offer programs or services that could be helpful. PG&E also continues to conduct AMP-eligible callout campaigns and includes AMP messaging in CARE/FERA outreach.

Disconnections

PG&E has resumed normal collection and disconnection practices for all residential customers, within the 3.5% annual disconnection rate for specific volumes. For additional information, please refer to the July 2024 Monthly Disconnect Data Report.^[3]

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

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

REACH

REACH YTD

- PG&E contributed \$55M for 2024 into REACH, a program that assists customers with past due balances, and expanded eligibility requirements to increase the pool of eligible customers and the maximum pledge amount (up to \$2K)
 - YTD REACH has served over 33,000 customers and provided over \$27.5M in grants to reduce arrearages.
 - Highest counties of participation: Fresno, San Joaquin, Kern, Contra Costa, Alameda, Merced, and Solano.

^[1] Data as of 7/31/2024

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

^[3] R.18-07-005 [Pacific Gas and Electric Company's July 2024 Monthly Disconnect Data Report](#), reporting 2024 activity through July, last accessed on August 20, 2024.

SCE Disconnections Status and AMP – Through July 2024

Arrearage Management Plan (AMP)

- Number of customers enrolled: 187,507
 - Percentage of eligible households enrolled: 14%
 - Number successfully completed 12-month program launched since Feb. 2021: 25,938
 - 14% of customers enrolled in AMP completed the 12-month enrollment
 - For those that do not complete the 12-months, the average length of enrollment is 6 months
- Total arrearages: \$345M
- Total amount forgiven: \$111M

Disconnections/Reconnections

Residential disconnections 2024 ¹ :	34,299
Residential Customers reconnected:	22,650

¹January to July 2024

AMP Case Management

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

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

AMP NEM outreach (outbound calls)

- 2024 (YTD)* – 439 calls completed



AMP Delayed Billing outreach

- 2024 (YTD)* – 370 letters mailed



SDG&E Disconnections Status and AMP – Through July 2024

Arrearage Management Plan (AMP)

- Number of customers enrolled: 22,497
- Percentage of eligible households enrolled: 63%
- Number of customers successfully completed 12-month program since Feb. 2021 launch: 11,461
 - 22% of customers enrolled in AMP completed the 12-month enrollment
 - For those that do not complete the 12 months, the average length of enrollment is 3 months
- Total arrearages actively enrolled in AMP: \$47.5M
- Total amount forgiven: \$46.5M

Disconnections

Number of disconnections: 18,091

Resumption of residential credit collection efforts started in Q3 2023.

AMP Marketing

Targeted Communications

- Included AMP messaging in CARE-eligible monthly bill comparison email
 - Targeted outbound calls and emails to eligible customers
- ### General Outreach
- Organic social media posts (Facebook, Instagram, Nextdoor)
 - AMP messaging on sdge.com/assistance
 - Bill inserts & bill package
 - Continued program education through SDG&E's Energy Solutions Partner Network, comprised of 200+ CBOs.

Neighbor-to-Neighbor*

Number of customers receiving N2N funds: 893

Total Amount Spent: \$269,365

*SDG&E shareholder funded utility assistance program

SoCalGas Disconnections Status and AMP – Through July 2024

Arrearage Management Plan (AMP)*

- Number of customers enrolled (1/1/2024- 7/31/24): 67,419
- Total arrearages (1/1/2024 - 7/31/24): \$86.5M
- Total amount forgiven (1/1/2024 - 7/31/24): \$15.9M
- Average length of participation for customers who did not complete the 12-month program
 - For those enrolled between 1/1/2024 - 7/31/2024 the average length of enrollment in the program was 5 months
- Number of customers who have successfully completed 12- month program since Feb 2021 launch until July 31, 2024: 65,218
- Percentage of eligible households enrolled since Feb 2021 until July 31, 2024: 71%

*Data through 7/31/2024, updated on 08/26/2024

Disconnections

Number of disconnections, Jan 1, 2024 – July 31, 2024: 545 residential disconnections have occurred during this time frame.

AMP Case Management

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



ESA and Demand Response

ESA - Demand Response 5-Year Recap

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

	2020	2021	2022	2023	YTD 2024*
SCE For additional DR program information, please visit: Demand Response Programs for Homes (sce.com)	218	294	285	39	24
SDG&E^[1] For additional DR program information, please visit: Demand Response for Your Home (sdge.com)	5	30	8	29	3
PG&E For additional DR program information, please visit: Energy incentive programs (pge.com)	360	514	1,168	943	0 ^[2]

*January – July 2024

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

^[2] PG&E's SmartAC Smart Thermostat program has closed enrollment for 2024.