

Low Income Oversight Board Energy Division Update

Presented by Kapil Kulkarni, Energy Division Staff
September 5, 2024



California Public
Utilities Commission

Agenda

- **Large IOUs ESA/CARE/FERA program cycle**
 - ESA Working Group
 - Planning for next cycle
 - Concurrent Application System update
- **Studies:**
 - **Low Income Needs Assessment**
 - **2025 Potential and Goals (P&G) study**
 - **Medical Baseline**

Large IOUs ESA/CARE/FERA Program Cycle

- **ESA Working Group**

- August 29, 2024 – Agenda included discussion of the IOUs' 2024 year-to-date ESA activities, and the Potential and Goals (P&G) study
- Materials will be available at <https://pda.energydataweb.com>

- **Planning for next program cycle**

- ED Staff for the ESA/CARE/FERA programs are continuing to meet with the IOUs to discuss the format and content of guidance for the next program cycle
- ED Staff will also be able to incorporate feedback from the TAC

Large IOUs ESA/CARE/FERA Program Cycle

- **Concurrent Application System – Phase I**

- Advice letter with final vendor contract extended to November 3, 2024

- **Concurrent Application System – Phase II**

- CAS Working Group developing recommendations for a Phase 2 system to present to the Commission for consideration next year
- The working group will review and consider all LIOB's SB 1208 Report recommendations that are relevant to CAS platform expansion
- Public workshop in November on draft recommendations

- ED Staff will provide a more detailed update at the Q4 LIOB meeting

2025 Low Income Needs Assessment

2025 Low Income Needs Assessment Schedule												
Task	2023				2024				2025			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<i>LIOB LINA Sub-Committee Meeting</i>	■											
Develop Scope of Work	■	■										
<i>LIOB LINA Sub-Committee Meeting on SOW</i>		■										
RFP released			■									
Consultant selection				■								
Develop Research Plan					■	■						
<i>LIOB LINA Sub-Committee Meeting on Research Plan</i>						■						
Data collection and analysis						■	■	■	■	■		
Draft Report											■	
<i>LIOB LINA Sub-Committee Meeting on Draft Report</i>												■
Final Report												■

2025 Potential and Goals (P&G) study

- **Recent Activity**

- Development of draft research plan by study consultant with input from ED and IOUs

- **Current Activity**

- Public workshop at August ESA WG meeting to review draft research plan, with comment period open

- **Upcoming Activity**

- Final report to be complete by Q3 2025

Medical Baseline study

- Was authorized in D.23-08-049, with a proposed budget between \$225,000 - \$350,000
- A third-party consultant will develop a statewide study plan to estimate the eligible Medical Baseline population within each IOUs' territory.
- Estimates of eligible customers resulting from this study will inform enrollment goals for each IOUs' Medical Baseline program.

Milestones	Dates
Public Workshop for the MBL Study Design	Wednesday, July 24, 2024
Finalize Study Design and File Tier 3 Advice Letter (AL) for CPUC Approval on MBL Study Design and Cost	By September 30, 2024
Release Draft Report and Hold Public Workshop for Discussion	Within 11 months of a resolution of the Tier 3 AL
Serve Final Report	Within 15 months of a resolution of the Tier 3 AL
File Second Tier 3 AL Focused on MBL Enrollment Targets and Update Processes	Within 90 days of serving the final MBL study report
CPUC Orders IOUs to Develop Individual Marketing and Outreach Plans Based on Study Findings	After Second Tier 3 AL Submission

Thank you!

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