

ATTACHMENT 1

**ATTACHMENT 1 - APPROVED BUDGETS, GOALS AND TARGETS FOR
CARE, FERA AND ESA (PROGRAM YEARS 2021-2026)**

Table 1: CARE Participation / Enrollment Percentage Goals

CARE Goals				
	PG&E	SCE	SoCalGas	SDG&E
PY	Participation/ Enrollment Goal	Participation/ Enrollment Goal	Participation/ Enrollment Goal	Participation/ Enrollment Goal
2021	93%	90%	95%	90%
2022	93%	91%	95%	90%
2023	93%	91%	95%	90%
2024	93%	91%	95%	90%
2025	93%	91%	95%	90%
2026	93%	92%	95%	90%

Table 2: CARE Approved Budgets

CARE Administrative Budget							
IOU	2021	2022	2023	2024	2025	2026	Total
PG&E	\$14,150,600	\$13,760,000	\$13,961,600	\$14,070,600	\$14,444,200	\$14,787,700	\$85,174,700
SCE	\$10,503,716	\$10,108,535	\$10,526,671	\$10,454,193	\$10,850,293	\$10,953,158	\$63,396,566
SoCalGas	\$9,859,663	\$10,085,592	\$10,181,364	\$10,465,069	\$10,774,132	\$10,915,864	\$62,281,684
SDG&E	\$6,622,169	\$6,741,045	\$6,922,453	\$7,013,368	\$7,399,570	\$7,401,649	\$42,100,254
Total	\$41,136,147	\$40,695,172	\$41,592,088	\$42,003,231	\$43,468,195	\$44,058,370	\$252,953,204

CARE Subsidy Budget							
IOU	2021	2022	2023	2024	2025	2026	Total
PG&E	\$683,539,000	\$687,689,000	\$691,973,000	\$696,394,000	\$700,957,000	\$705,667,000	\$4,166,219,000
SCE	\$399,664,922	\$404,343,437	\$409,564,225	\$415,120,450	\$421,034,721	\$427,678,676	\$2,477,406,431
SoCalGas	\$138,389,984	\$139,583,569	\$140,801,916	\$142,032,348	\$143,264,981	\$144,495,405	\$848,568,203
SDG&E	\$120,383,441	\$121,587,275	\$122,803,149	\$124,031,180	\$125,271,491	\$126,524,206	\$740,600,742
Total	\$1,341,977,347	\$1,353,203,281	\$1,365,142,290	\$1,377,577,978	\$1,390,528,193	\$1,404,365,287	\$8,232,794,376

CARE Administrative + Subsidy Budget							
IOU	2021	2022	2023	2024	2025	2026	Total
PG&E	\$697,689,600	\$701,449,000	\$705,934,600	\$710,464,600	\$715,401,200	\$720,454,700	\$4,251,393,700
SCE	\$410,168,638	\$414,451,972	\$420,090,896	\$425,574,643	\$431,885,014	\$438,631,834	\$2,540,802,997
SoCalGas	\$148,249,646	\$149,669,161	\$150,983,280	\$152,497,417	\$154,039,114	\$155,411,268	\$910,849,886
SDG&E	\$127,005,610	\$128,328,320	\$129,725,602	\$131,044,548	\$132,671,061	\$133,925,855	\$782,700,996
Total	\$1,383,113,494	\$1,393,898,454	\$1,406,734,378	\$1,419,581,208	\$1,433,996,389	\$1,448,423,657	\$8,485,747,580

**ATTACHMENT 1 - APPROVED BUDGETS, GOALS AND TARGETS FOR
CARE, FERA AND ESA (PROGRAM YEARS 2021-2026)**

Table 3: FERA Participation and Enrollment Percentage Goals

FERA Goals			
	PG&E	SCE	SDG&E
PY	Participation/ Enrollment Goal	Participation/ Enrollment Goal	Participation/ Enrollment Goal
2021	30%	30%	30%
2022	40%	40%	40%
2023	50%	50%	50%
2024	60%	60%	60%
2025	65%	65%	65%
2026	70%	70%	70%

Table 4: FERA Approved Budgets

FERA Administrative Budget							
IOU	2021	2022	2023	2024	2025	2026	Total
PG&E	\$2,484,700	\$2,794,400	\$2,846,400	\$2,929,000	\$2,997,900	\$3,055,800	\$17,108,200
SCE	\$637,450	\$695,695	\$759,765	\$830,244	\$907,766	\$993,040	\$4,823,960
SDG&E	\$594,574	\$703,150	\$612,393	\$621,815	\$630,578	\$640,368	\$3,802,878
Total	\$3,716,724	\$4,193,245	\$4,218,558	\$4,381,059	\$4,536,244	\$4,689,208	\$25,735,038

FERA Subsidy Budget							
IOU	2021	2022	2023	2024	2025	2026	Total
PG&E	\$10,353,000	\$12,898,000	\$15,727,000	\$18,273,000	\$20,819,000	\$23,364,000	\$101,434,000
SCE	\$21,014,914	\$28,746,536	\$37,353,692	\$46,164,249	\$51,506,652	\$57,127,419	\$241,913,462
SDG&E	\$2,989,008	\$3,431,175	\$3,881,387	\$4,444,713	\$4,912,466	\$5,388,762	\$25,047,511
Total	\$34,356,922	\$45,075,711	\$56,962,079	\$68,881,962	\$77,238,118	\$85,880,181	\$368,394,973

FERA Administrative + Subsidy Budget							
IOU	2021	2022	2023	2024	2025	2026	Total
PG&E	\$12,837,700	\$15,692,400	\$18,573,400	\$21,202,000	\$23,816,900	\$26,419,800	\$118,542,200
SCE	\$21,652,364	\$29,442,231	\$38,113,457	\$46,994,493	\$52,414,418	\$58,120,459	\$246,737,422
SDG&E	\$3,583,582	\$4,134,325	\$4,493,780	\$5,066,528	\$5,543,044	\$6,029,130	\$28,850,389
Total	\$38,073,646	\$49,268,956	\$61,180,637	\$73,263,021	\$81,774,362	\$90,569,389	\$394,130,011

**ATTACHMENT 1 - APPROVED BUDGETS, GOALS AND TARGETS FOR
CARE, FERA AND ESA (PROGRAM YEARS 2021-2026)**

Table 5: ESA Annual Energy Savings Goals (kWh, kW, Therms)¹

Annual Energy Savings Goals in kWh						
IOU	2022	2023	2024	2025	2026	Total
PG&E	15,093,167	35,773,079	34,253,799	33,818,185	33,214,979	152,153,209
SCE	18,788,420	22,416,302	31,762,240	33,507,277	25,051,480	131,525,719
SoCalGas	0	0	0	0	0	0
SDG&E	2,955,161	2,593,606	2,769,999	2,906,619	3,169,076	14,394,461
Total	36,836,748	60,782,987	68,786,038	70,232,080	61,435,535	298,073,388

Annual Energy Savings Goals in kW						
IOU	2022	2023	2024	2025	2026	Total
PG&E	2,859	3,238	2,941	2,854	2,737	14,629
SCE	7,147	8,820	12,681	13,451	9,855	51,953
SoCalGas	-	-	-	-	-	0
SDG&E	428	377	404	424	463	2,095
Total	10,434	12,435	16,026	16,728	13,055	68,677

Annual Energy Savings Goals in Therms						
IOU	2022	2023	2024	2025	2026	Total
PG&E	629,105	1,458,655	1,393,298	1,370,794	1,348,961	6,200,814
SCE	194,965	244,348	383,213	363,961	289,314	1,475,800
SoCalGas	1,435,220	1,435,220	1,435,220	1,435,220	1,435,220	7,176,099
SDG&E	127,171	108,790	115,389	120,065	129,739	601,154
Total	2,386,461	3,247,014	3,327,120	3,290,039	3,203,234	15,453,866

Table 6: ESA Household Treatment Goals and Targets²

Annual Household Treatment Goals and Targets							
IOU	2021 (Goals) (July 1 to Dec. 31)	2022 (Targets)	2023 (Targets)	2024 (Targets)	2025 (Targets)	2026 (Targets)	Total
PG&E	50,000	59,340	60,437	54,876	52,954	51,099	328,705
SCE	43,562	27,051	37,871	64,922	59,512	56,806	289,725
SoCalGas	60,000	94,600	69,837	69,837	69,837	69,837	433,948
SDG&E	5,973	13,760	11,711	14,138	14,780	16,065	76,427
Total	159,535	194,751	179,857	203,773	197,083	193,807	1,128,805

¹ The Approved Annual Energy Savings Goals (kWh, kW, and Therms) for PYs 2022-2026 are for the entire ESA Portfolio, including Main ESA, MF in-unit, MF CAM, and MFWB, with the singular exception of the Staff Proposal pilot.

² The household treatment goals and targets for PYs 2022-2026 are for the entire ESA Portfolio, including Main ESA, MF in-unit, and MF CAM, with the exceptions of the MFWB and Staff Proposal pilot.

**ATTACHMENT 1 - APPROVED BUDGETS, GOALS AND TARGETS FOR
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Table 7: ESA Approved Budgets (All IOUs)³

IOU	2021 (July 1 to Dec. 31)	2022	2023	2024	2025	2026	Total
PG&E	\$89,362,820	\$152,758,877	\$172,231,361	\$171,757,189	\$171,120,842	\$170,915,152	\$928,146,242
SCE	\$40,926,750	\$58,773,576	\$69,127,408	\$91,154,996	\$96,372,294	\$74,799,327	\$431,154,350
SoCalGas	\$67,066,667	\$122,802,317	\$122,824,705	\$122,814,843	\$122,849,884	\$122,541,070	\$680,899,486
SDG&E	\$10,729,079	\$25,832,330	\$27,043,980	\$29,894,951	\$31,768,583	\$33,329,042	\$158,597,966
Total	\$208,085,316	\$360,167,100	\$391,227,455	\$415,621,978	\$422,111,603	\$401,584,592	\$2,198,798,044

³ The Approved Budgets are for the entire ESA Portfolio, including Main ESA, MF in-unit, MF CAM, MFWB, and the Staff Proposal pilot. The 2021 budget is based on the budgets approved for the bridge period per PG&E Advice Letter 6035-E-B/4351-G-B, SCE Advice Letter 4053-A, SoCalGas Advice Letter 5501-G-A, and SDG&E Advice Letter 3612-E/2905-G, per D.19-06-022 and D.20-08-033..

ATTACHMENT 1 - APPROVED BUDGETS, GOALS AND TARGETS FOR CARE, FERA AND ESA (PROGRAM YEARS 2021-2026)

**Table 8: ESA Approved Budgets (PG&E)⁴
PG&E Approved Budgets by Category**

	2021 (July 1 to Dec. 31)	2022	2023	2024	2025	2026	Total
EE Subtotal (A+B)	\$82,012,300	\$129,622,839	\$149,063,154	\$148,843,360	\$147,909,235	\$147,528,582	\$804,979,469
EE (A)	\$69,056,812 ⁵	\$103,732,423	\$112,569,288	\$104,331,278	\$102,061,789	\$100,305,712	
EE-MF (B)	\$12,955,488 ⁶	\$25,890,417	\$36,493,866	\$44,512,082	\$45,847,446	\$47,222,869	
EE-MF, SPOC	\$131,887	\$211,023	\$343,938	\$354,256	\$364,883	\$375,829	
Training Center	\$378,869	\$568,572	\$426,698	\$426,698	\$426,698	\$426,698	\$2,654,231
Workforce Education and Training	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Inspections	\$1,565,823	\$2,903,667	\$3,918,395	\$3,844,018	\$3,856,563	\$3,870,097	\$19,958,564
Marketing and Outreach	\$1,202,904	\$2,279,188	\$1,950,350	\$1,736,309	\$1,849,498	\$1,791,562	\$10,809,812
Statewide Marketing and Outreach	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Studies	\$147,500	\$225,000	\$292,500	\$315,000	\$117,500	\$125,000	\$1,222,500
Regulatory Compliance	\$281,147	\$579,165	\$596,543	\$614,436	\$812,329	\$836,697	\$3,720,317
General Administration	\$3,744,238	\$7,735,956	\$7,137,375	\$7,129,112	\$7,298,794	\$7,484,262	\$40,529,737
CPUC Energy Division	\$30,039	\$61,883	\$63,740	\$65,649	\$67,618	\$69,647	\$358,577
Subtotal - Admin	\$7,350,520	\$14,353,431	\$14,385,600	\$14,131,222	\$14,429,000	\$14,603,963	\$79,253,736
Program Total	\$89,362,820	\$143,976,270	\$163,448,754	\$162,974,582	\$162,338,235	\$162,132,545	\$884,233,206
Staff Proposal Pilot Total		\$8,782,607	\$8,782,607	\$8,782,607	\$8,782,607	\$8,782,607	\$43,913,036
Portfolio Total	\$89,362,820	\$152,758,877	\$172,231,361	\$171,757,189	\$171,120,842	\$170,915,152	\$928,146,242

⁴ PG&E's budget by category for the second half of PY 2021 bridge period, specifically the EE (A) line item, has been supplemented to match the approved first half of 2021 bridge funding budget.

⁵ We do not specify the breakout for multifamily PY2021 for in-unit treatments as this was not provided in the bridge funding advice letters.

⁶ This covers PG&E's proposed multifamily spending categories (CSD Leveraging, ESA CAM, and SPOC) in the same proportion as their Application Table A-1.

ATTACHMENT 1 - APPROVED BUDGETS, GOALS AND TARGETS FOR CARE, FERA AND ESA (PROGRAM YEARS 2021-2026)

Table 9: ESA Approved Budgets (SCE)⁷

SCE Approved Budgets by Category							
	2021 (July 1 to Dec. 31)	2022	2023	2024	2025	2026	Total
EE Subtotal (A+B)	\$36,098,517 ⁸	\$44,048,684	\$55,459,700	\$78,032,800	\$83,101,017	\$62,003,783	\$358,744,502
EE (A)		\$37,471,491	\$46,199,512	\$60,494,956	\$68,400,219	\$49,669,535	
EE-MF (B)		\$6,577,193	\$9,260,188	\$17,537,845	\$14,700,798	\$12,334,249	
Training Center	\$300,325	\$600,650	\$450,488	\$450,488	\$450,488	\$450,488	\$2,702,927
Workforce Education and Training	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Inspections	\$838,704	\$1,677,406	\$968,374	\$864,125	\$950,922	\$949,618	\$6,249,148
Marketing and Outreach	\$516,906	\$1,374,878	\$1,988,580	\$2,346,963	\$2,539,025	\$2,186,503	\$10,952,855
Statewide Marketing and Outreach	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Studies	\$147,500	\$225,000	\$342,500	\$290,000	\$92,500	\$125,000	\$1,222,500
Regulatory Compliance	\$381,941	\$691,730	\$791,921	\$720,611	\$821,669	\$751,251	\$4,159,122
General Administration	\$2,617,069	\$6,218,785	\$5,189,403	\$4,513,566	\$4,480,231	\$4,396,242	\$27,415,296
SPOC	\$85,965	\$171,929	\$171,929	\$171,929	\$171,929	\$171,929	\$945,611
CPUC Energy Division	\$25,789	\$51,579	\$51,579	\$51,579	\$51,579	\$51,579	\$283,683
Subtotal - Admin	\$4,828,233	\$10,840,028	\$9,782,845	\$9,237,332	\$9,386,413	\$8,910,680	\$52,985,531
Program Total	\$40,926,750	\$54,888,712	\$65,242,545	\$87,270,132	\$92,487,430	\$70,914,463	\$411,730,032
Staff Proposal Pilot Total		\$3,884,864	\$3,884,864	\$3,884,864	\$3,884,864	\$3,884,864	\$19,424,318
Portfolio Total	\$40,926,750	\$58,773,576	\$69,127,408	\$91,154,996	\$96,372,294	\$74,799,327	\$431,154,350

⁷ SCE's budget by category for the second half of PY 2021 bridge period, specifically the EE (A) line item, has been supplemented to match the approved first half of 2021 bridge funding budget.

⁸ We do not specify the break-out for multifamily PY2021 for in-unit treatments as this was not provided in the bridge funding advice letters.

ATTACHMENT 1 - APPROVED BUDGETS, GOALS AND TARGETS FOR CARE, FERA AND ESA (PROGRAM YEARS 2021-2026)

Table 10: ESA Approved Budgets (SoCalGas)⁹

SoCalGas Approved Budgets by Category							
	2021 (July 1 to Dec. 31)	2022	2023	2024	2025	2026	Total
EE Subtotal (A+B)	\$61,165,214 ¹⁰	\$104,432,051	\$104,315,034	\$104,104,320	\$103,801,243	\$103,408,497	\$581,226,359
EE (A)		\$82,826,162	\$82,837,720	\$82,880,025	\$82,850,295	\$82,844,757	
EE-MF (B)		\$21,605,889	\$21,477,314	\$21,224,295	\$20,950,948	\$20,563,740	
Training Center	\$535,603	\$1,066,865	\$777,697	\$794,031	\$810,413	\$827,048	\$4,811,658
Workforce Education and Training	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Inspections	\$791,002	\$1,606,551	\$1,510,696	\$1,536,622	\$1,561,997	\$1,586,833	\$8,593,701
Marketing and Outreach	\$689,766	\$1,383,806	\$1,398,505	\$1,413,383	\$1,437,876	\$1,462,019	\$7,785,355
Statewide Marketing and Outreach	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Studies	\$112,500	\$218,750	\$262,500	\$168,750	\$231,250	\$75,000	\$1,068,750
Regulatory Compliance	\$241,166	\$495,468	\$472,833	\$523,227	\$536,772	\$513,413	\$2,782,880
General Administration	\$3,485,201	\$6,993,078	\$7,478,835	\$7,662,963	\$7,855,757	\$8,050,562	\$41,526,395
SPOC	\$133,557	\$275,227	\$283,336	\$291,503	\$299,829	\$308,278	\$1,591,731
CPUC Energy Division	\$46,215	\$95,203	\$98,059	\$101,001	\$104,031	\$107,152	\$551,661
Subtotal - Admin	\$5,901,453	\$11,859,721	\$11,999,126	\$12,199,978	\$12,538,096	\$12,622,027	\$67,120,401
Program Total	\$67,066,667	\$116,291,771	\$116,314,160	\$116,304,297	\$116,339,339	\$116,030,525	\$648,346,760
Staff Proposal Pilot Total		\$6,510,545	\$6,510,545	\$6,510,545	\$6,510,545	\$6,510,545	\$32,552,726
Portfolio Total	\$67,066,667	\$122,802,317	\$122,824,705	\$122,814,843	\$122,849,884	\$122,541,070	\$680,899,486

⁹ SoCalGas' budget by category for the second half of PY 2021 bridge period, specifically the EE (A) line item, has been supplemented to match the approved first half of 2021 bridge funding budget.

¹⁰ We do not specify the breakout for multifamily PY2021 for in-unit treatments as this was not provided in the bridge funding advice letters.

ATTACHMENT 1 - APPROVED BUDGETS, GOALS AND TARGETS FOR CARE, FERA AND ESA (PROGRAM YEARS 2021-2026)

Table 11: ESA Approved Budgets (SDG&E)¹¹
SDG&E Approved Budgets by Category

	2021 (July 1 to Dec. 31)	2022	2023	2024	2025	2026	Total
EE Subtotal (A+B)	\$7,595,389 ¹²	\$16,815,503	\$20,188,646	\$23,190,553	\$24,682,496	\$26,353,868	\$118,826,454
EE (A)		\$11,505,879	\$12,324,066	\$14,176,465	\$15,439,020	\$17,214,498	
EE-MF (B)		\$5,309,624	\$7,864,581	\$9,014,088	\$9,243,475	\$9,139,370	
Training Center	\$118,173	\$337,201	\$305,202	\$248,304	\$188,897	\$160,614	\$1,358,391
Workforce Education and Training	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Inspections	\$79,985	\$162,981	\$100,722	\$103,744	\$106,856	\$110,062	\$664,350
Marketing and Outreach	\$523,128	\$1,069,140	\$1,506,347	\$1,587,362	\$1,624,858	\$1,674,124	\$7,984,959
Studies	\$211,250	\$162,500	\$125,000	\$50,000	\$162,500	\$50,000	\$761,250
Regulatory Compliance	\$138,918	\$294,680	\$300,652	\$295,630	\$301,921	\$308,400	\$1,640,202
General Administration	\$1,957,854	\$5,104,453	\$2,610,272	\$2,358,952	\$2,483,881	\$2,433,898	\$16,949,310
CPUC Energy Division	\$25,783	\$53,113	\$54,707	\$56,348	\$58,038	\$59,780	\$307,769
SPOC	\$78,599	\$306,076	\$325,748	\$477,376	\$632,453	\$651,613	\$2,471,865
Subtotal - Admin	\$3,133,690	\$7,490,144	\$5,328,651	\$5,177,715	\$5,559,405	\$5,448,491	\$32,138,096
Program Total	\$10,729,079	\$24,305,647	\$25,517,297	\$28,368,268	\$30,241,900	\$31,802,359	\$150,964,551
Staff Proposal Pilot Total		\$1,526,683	\$1,526,683	\$1,526,683	\$1,526,683	\$1,526,683	\$7,633,415
Portfolio Total	\$10,729,079	\$25,832,330	\$27,043,980	\$29,894,951	\$31,768,583	\$33,329,042	\$158,597,966

¹¹ SDG&E's budget by category for the second half of PY 2021 bridge period, specifically the EE (A) line item, has been supplemented to match the approved first half of 2021 bridge funding budget.

¹² We do not specify the breakout for multifamily PY2021 for in-unit treatments as this was not provided in the bridge funding advice letters.

ATTACHMENT 2

ATTACHMENT 2 - Guidance of the Energy Savings Assistance Program's Pilot Plus and Pilot Deep Program (Program Years 2021-2026)

1. **Summary:** This decision allocates approximately \$104 million, (\$44 million for PG&E, \$19 million for SCE, \$33 million for SoCalGas and \$8 million for SDG&E), to pilot the Pilot Plus and Pilot Deep measure packages within each IOUs' service territory. It is expected that the Pilot Plus and Pilot Deep treatments will require a greater investment per household but in return will yield deeper savings with energy savings targets expected at five percent up to fifty percent. Through this pilot, the IOUs will gather data on the feasibility of strategic measures delivery, including electrification measures, the level of investment required for such deep energy retrofits, the realized savings (energy savings and bill impacts) to the household, the long term benefits of these treatments (including non-energy benefits), and the cost effectiveness of each treatment tier. This document provides guidance on the pilot, a list of potential workshop topics, as well as elements to include in the advice letter implementation plans. The guidance as described in this Attachment and not ordered as part of Sections 6, 8, 10 of this decision, may be periodically amended or updated by Energy Division (ED) Staff. ED Staff shall keep the most updated version of this attachment available at:
<https://www.cpuc.ca.gov/iqap/>.
2. **Pilot Guiding Principles:** The guiding principles used to develop the pilot shall include:
 - Deeper Energy Savings
 - Achieves between an estimated 5 percent and 15 percent savings through the Pilot Plus measure package.
 - Achieves between an estimated 15 percent and 50 percent savings through the Pilot Deep measure package.
 - Equity – While the focus of the program may be towards single-family, owner-occupied homes, the IOUs shall consider how to increase program participation

ATTACHMENT 2 - Guidance of the Energy Savings Assistance Program's Pilot Plus and Pilot Deep Program (Program Years 2021-2026)

opportunities to renters and whether landlord co-investment is reasonable, given the rent restrictions and landlord co-pays for the multifamily whole building programs, as described in Section 7.9.

- **Quality** – Focus on capturing meaningful, deeper savings for low-income households. This means spending more on fewer households, and dramatically increasing the impact of the treatment.
- **Customer-centric** – A seamless low-income program delivery for the recipient with as many services provided in as few visits as possible, and greater customer satisfaction.
- **Optimization** – Reduction in program administration, duplicative costs, and burdens to ratepayers. Maximize total funding to go towards program measures that save energy and/or reduce ratepayer collection.

3. **Budget:** Approximately \$104 million is allocated for the pilot as follows:

Table 1 – Approved Pilot Budget

	2022	2023	2024	2025	2026	Total
PG&E	\$8,782,607	\$8,782,607	\$8,782,607	\$8,782,607	\$8,782,607	\$43,913,036
SCE	\$3,884,864	\$3,884,864	\$3,884,864	\$3,884,864	\$3,884,864	\$19,424,318
SoCalGas	\$6,510,545	\$6,510,545	\$6,510,545	\$6,510,545	\$6,510,545	\$32,552,726
SDG&E	\$1,526,683	\$1,526,683	\$1,526,683	\$1,526,683	\$1,526,683	\$7,633,415
Total	\$20,704,699	\$20,704,699	\$20,704,699	\$20,704,699	\$20,704,699	\$103,523,495

The approved budget shall fund the following components of the pilot:

- Energy efficiency and other measure delivery – Most of the pilot funds shall go towards assessment and installation of Pilot Plus and Deep measure packages.
- Study/ Evaluation – An independent evaluation of the pilot shall be conducted. As part of the evaluation, the IOUs and evaluator shall study energy use patterns

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and billing costs of a comparison group of non-participants to further understand the usefulness of the pilot.

- Inspections – Inspections of treatments shall be conducted.
- Marketing and Outreach – Minimal funds may be allocated for marketing and outreach efforts specific to this pilot only.
- Regulatory Compliance – Minimal funds may be allocated for compliance efforts specific to this pilot only.
- General Administration – Funds may be allocated for administration of the pilot, not to exceed 10 percent of the pilot budget.

4. **Cost Effectiveness:** No specific cost effectiveness threshold is being set for this pilot; however, the IOUs shall track the cost effectiveness of the treatments, and the impact to the overall ESA program portfolio cost effectiveness with the addition of the pilot treatments.

5. **Customer Targeting and Protections:** The IOUs shall target those customers that are deemed the neediest and have the ability and opportunity to achieve the specified percent savings per household as identified under the guiding principles. These customers may include:

- Customers that have been identified as being in multiple need states as discussed in Section 6.6 of the decision or have been identified in at least one sub-category in each of the four main categories (Demographic, Financial, Geographic, Health). For example, customers who are high usage and medical baseline, and may also be a part of other, multiple need states be prioritized over customers who are only high usage.
- Customers who have already received the IOUs' basic package, and based on the initial home assessment, will benefit from ESA services beyond what the IOUs can provide in their plus packages.

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- New or previously unwilling customers who have not received the IOUs' basic package but have needs beyond what the IOUs can provide in the plus packages.
- Renters, in addition to owner-occupied homes. The IOUs must utilize Resolution E-5043's Appendix B 'Split Incentives Agreement' that requires owners to agree for five years to eviction limits and a fixed cap on annual rent increases at 3.6 percent to protect participating renters from significant rent increases or displacement posttreatment. The IOUs must adjust the required signing parties to their Pilot 'Split Incentives Agreement' to include the property owner, tenant, and either their implementer or the utility.

6. **Proposed Measures:** Rather than propose specific measures, the target customer strategies discussed above will help determine the most optimal measure mix to meet the household's needs.

First, measures included in the pilot should complement and build upon the IOU (Basic and Plus) measure packages, as submitted, and approved through the IOUs compliance filing advice letter described in Attachment 3. We require that Pilot contractors be able to provide all direct-install measures and discourage multiple treatments by contractors to install the IOUs Basic and Plus measure packages, and the Pilot Plus or Pilot Deep measure packages.

The IOUs can split funding for measures (along with savings attribution) between ESA and this Pilot even though we require delivery to the household in a manner that minimizes their disruption and adds to an expedient treatment timeline. In addition, we provide the IOUs with budget and treatment flexibility as to the balance between Pilot Plus and Pilot Deep measure packages. The IOUs are required to provide both measure packages in enough volume (number of households participating) to substantiate a useful evaluation of each measure

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package at the end of the pilot period. The IOUs should ensure that these packages go beyond the IOUs' approved measure packages, and that the delivery of the Pilot packages are tailored to customer needs, based on customer data collected by the IOUs.

Second, we reaffirm the original Staff Proposal measure suggestions as a starting point for workshop discussion and pilot inclusion. The Pilot Plus package will offer certain equipment and appliance replacements and load shifting technologies, including electrification measures, in addition to any IOU basic package measures not already installed, that will reduce annual energy usage by 5 to 15 percent. The Pilot Deep package will offer the more advanced, and likely more expensive measures that will achieve a 15 to 50 percent reduction in annual energy usage, in addition to any Basic and Plus package measures not already installed.

Third, we reaffirm the minor home repairs allowance per household to facilitate measure package installation; additionally, pest or mold mitigation may be included if needed to facilitate the installation of efficiency measures or create a safe working environment (for contractors).

Below is a list of potential measures for each of the two packages. This list serves as a starting point – with additional measures proposed and discussed at the workshop and proposed by the IOUs in the advice letter filing.

Table 2 – Pilot Plus and Pilot Deep Packages

Pilot - Plus Package	Pilot - Deep Package
Equipment	Equipment
Efficient Equipment, including heating, venting and air conditioning (HVAC) and Hot Water Systems with control technologies and heat pump technology	Replacing HVAC and Hot Water Systems, including heat pumps, to “right size” equipment for heating and cooling loads
Efficient Appliances	

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Efficient Lighting (internal and external)	
Common Area Measures, including central boilers or similar	
Systems Management Devices and Monitoring Technologies	Systems Management Devices and Monitoring Technologies
HVAC Controls	
Energy Management Technologies	
Demand Response measures with the appropriate electric rate	
Building Envelope	Building Envelope
Air Sealing, Duct Sealing	Improvement or replacement of duct work, water pipes, and waste heat recovery
	High Performance Attics
	Cool Roofs or Cool Surfaces
	Advanced Insulation, including Walls, Floor/Slab, Roof, Attic
	Efficient Windows and Insulated Doors
	Additional Building Shell Upgrades
Miscellaneous	
IOUs' Basic or Plus package measures not already installed	Pilot Plus package measures not already installed
Opportunities for ESA to co-fund other clean energy program measures, such as	Wildfire resiliency maintenance measures for households in fire threat zones

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battery installations, to ensure access and allow program partners to extend their budgets	(during Fire Season) such as clearing drain spouts
Wildfire resiliency measures for households in fire threat zones, such as covering chimney, stovepipe, or vent openings with appropriate non-combustible screen materials	

7. **Pilot Program Design:** The IOUs shall consider a variety of program designs, including but not limited to the following:
- IOU designed, third-party implemented, (modified third-party solicitation process) similar to ESA multifamily whole building program, with or without an independent evaluator and peer review group.
 - Statewide program with or without third-party, with funding allocated to each IOU.
 - Full third-party solicitation process, including design and implementation, with or without statewide implementation.
 - Regional implementation, particularly shared service for SCE and SoCalGas, similar to ESA multifamily whole building program.

The IOUs shall adhere to the contracting directives of section 6.10 of the decision, including "Open Competitive Bidding" as well as "Requirements for All Solicitation Processes." Regardless of the program design selected, the IOUs are expected to begin implementation of the program starting July 2022, subject to Energy Division staff approval of the advice letters, and to expend fully the set aside of funding each year.

8. **Other Considerations:** The IOUs shall consider other policies and rules detailed in the decision, such as statewide consistency, as well as propose other pilot rules to

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maximize customer benefits, minimize program costs, and achieve the deeper savings that are a goal of this pilot.

9. **Pilot Workshop:** Within 120 days from the date of this decision, the IOUs in coordination with Energy Division staff, will lead at least one workshop with stakeholders to introduce the IOUs' preliminary implementation plans for the Pilot Deep and Pilot Plus measure packages and seek stakeholder feedback.
10. **Advice Letter Criteria:** Each IOU shall file a Tier 2 advice letter by no later than 90 days after the first pilot workshop detailing the pilot implementation plan with the information below. Energy Division staff will review each advice letter and dispose of it accordingly.
 - **Pilot Workshop Summary:** The IOUs shall provide a summary of the workshop, including how workshop lessons were incorporated into their pilot implementation plan.
 - **Pilot Budget:** The IOUs shall provide an annual budget with detail for each of the categories listed above.
 - **Customer Targeting:** Based on the options listed above, the IOUs shall describe which customer segments it will target, and how it plans to target the groups for each of the Pilot Plus and Pilot Deep packages.
 - **Pilot Measures:** The IOUs shall propose a list of measures for each of the Pilot Plus and Pilot Deep packages, with the consideration that the IOUs will be able to add, modify, or remove measures through the monthly reports.
 - **Pilot Program Design:** The IOUs shall discuss how they plan to design and implement the pilot, per the potential options listed above.
 - **Evaluation Plan:** The IOUs shall include a high-level evaluation plan, with the consideration that a specific evaluation study scope will be determined in conjunction with the ESA / CARE Study Working Group.

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- Pilot Standards: The IOUs shall supplement their pilot proposal advice letters with the additional information below:
 - Lessons already learned from previous research and pilots, and how these past and potentially ongoing lessons will relate to the currently proposed pilot;
 - Gaps in understanding that will be filled by the proposed pilot, and the logic for the specific pilot study design proposed;
 - Whether the IOU intends to deploy the pilot at a larger scale, and if so, how the metrics and data collected will enable the IOU to decide whether to recommend a wider roll-out;
 - Whether there are opportunities for learning on other, related issues.

ATTACHMENT 3

ATTACHMENT 3 - Energy Savings Assistance Program's Compliance Filing Requirements (Program Years 2021-2026)

1. **Summary:** The IOUs are to meet and confer, and jointly submit a compliance filing via a Tier 2 advice letter 90 days after the decision to develop a common set of measures within each treatment tier. The purpose of this is to further detail what level of treatment will be provided to which customer segments to provide greater statewide consistency in how the ESA program is designed and delivered. The IOUs shall strive for alignment/conformity in how treatment levels are delivered to customer segments, and should minimize where there are differences/deviations, and provide rationale for where there is not statewide consistency.
2. **Treatment Level Names:** Table A1 below defines the new treatment level names to be used in the compliance filing, based on the names used in the IOUs applications and Staff Proposal.

Table A1: Mapping of new Treatment Level Names

Treatment levels (new naming convention)	Basic level (estimated savings up to 5%)	Plus level (estimated savings up to 15%)			Pilot Deep - (up to 50%)	Staff Proposed - MFWB (providing tenant, common area, and/or WB)
Treatment level (old names used by IOUs and Staff)	IOU proposed - Basic treatment	IOU proposed - Advanced treatment	IOU proposed Need state specific treatment	Staff Proposal Tier 2 - up to 15%	Staff Proposal Tier 3 - up to 50%	Staff Proposed - MFWB (providing tenant, common area, and/or WB)
Proposed measure set	The IOUs proposed LED lamps, smart power strips, and other simple electric and gas measures.	The IOUs proposed additional weatherization and equipment measures beyond Basic treatment.	The IOUs proposed a limited measure set based on specific need.	Measure packages will be determined through workshop and AL.		MF measures will be determined by bidders

3. **Instructions:** The IOUs shall fill out Table A2 with its proposed segments to be treated, and list of measures. For each treatment level, the IOUs will list the

**ATTACHMENT 3 - Energy Savings Assistance Program's
Compliance Filing Requirements
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customer segments that will be treated, and measures that will be provided for each segment. IOUs shall also list where the segments and measures across treatment levels are consistent or different across the IOUs. The treatment level is defined in Table A1, and the segments are listed in Table A3. In addition, for each treatment level and segment (if applicable) combination, the IOUs shall each list the estimated number of household treatments in its territory, in addition to the estimated treatment cost per household. The product of these two estimates (number of treatments, and cost per treatment) across all segments should be similar to the authorized "Energy Efficiency Total" (informally known as above-the-line) budgets for each IOU.

Table A2: IOU proposed Treatment levels with targeted Segments and Measures

Treatment level	Basic		Plus		Staff Proposed - MFVB	
Consistent across IOUs	Segments(s) list Eg: Segment 1 Segment 2 Segments 3 and 4	Measure(s) list Eg: Segment 1 - Measures 1 and 2 Segment 2 - Measures 1 and 3 Segments 3 and 4 - Measures 1, 2, and 3	Segment(s) list	Measure(s) list	Segment(s) list	Measure(s) list
Different across IOUs	Segment(s) list	Measure(s) list	Segment(s) list	Measure(s) list	N/A	N/A

**ATTACHMENT 3 - Energy Savings Assistance Program's
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4. **Advice Letter Criteria:** The IOUs will jointly submit an advice letter using information from their applications and related directives from the decision. Energy Division will review and dispose of the advice letter if it meets the following criteria:
- The IOUs list each treatment level, customer segment to be treated, and measure(s) to be installed.
 - The IOUs list whether these treatment, segment, and measure combinations are consistent or different across the IOUs.
 - Each combination also lists the estimated number of household treatments, and treatment cost per household, by IOU.
 - The IOUs use consistent definitions and methodologies in describing and quantifying number of customers in a segment.
 - For each IOU, the product of the estimated number of household treatments and treatment cost per household across all segments is similar to the authorized "Energy Efficiency Total" (informally known as above-the-line) budget.
5. **Reporting:** The current list of reporting categories (Demographic, Financial, Location, Health Condition) and segments is below. The IOUs shall report on activity (eligible population, number of treatments, etc.) for each of these segments even if they are not prioritized for treatment, using the reporting templates determined by the Energy Division.
- Eligible households
 - Households contacted
 - Households treated
 - Average savings per treated household in kWh / kW / therms (simple average of energy savings divided by number of households treated)

**ATTACHMENT 3 - Energy Savings Assistance Program's
Compliance Filing Requirements
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Table A3: Reporting Categories and Segments

Demographic	Financial	Location	Health Condition
Housing type	CARE	DAC	Medical Baseline
Rent vs Own	Disconnected	Rural	Respiratory
Previous vs new participant	Arrearages	Tribal	Disabled
Seniors	High usage	PSPS Zone	
Veterans	High energy burden	Wildfire Zone	
Hard-to-reach	SEVI	Climate Zone	
Vulnerable	Affordability Ratio	CARB Communities	

Note: The IOUs shall confer and provide a consistent definition for each of these customer segments, including the source of the definition, and to use updated definitions from the Commission, ESA, or Main energy efficiency proceedings, where available.

6. **IOU-proposed framework**: For reference only, the below table includes prioritized segments proposed by the IOUs and does not include all the segments for which we require reporting (for example, customers with high arrearages, shown in Table A3). The table also does not account for customers that are a part of multiple segments.

As multiple IOUs identify high-usage customers as priority customer segments to target and treat, the IOUs shall confer and define a consistent statewide definition for low, medium, and high usage customers and include them in Table A2 above. We recommend the IOUs consider the % of energy baseline use figures used in the applications' program designs (for example, SCE's use of 300% for High-Usage customers), as well as the statute that generally identifies customers at 400% or more of energy baseline use as high usage, per Public Utilities Code 739.1(i)1-2.

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Table A4: IOUs' Proposed Treatment Levels and Segments

IOU	Basic Treatment – Targeted Segments	Advanced Treatment – Targeted Segments	Specific Measure Treatment for Targeted Segments
PG&E	Self-certified income eligible households	Income eligible households	Disconnected, High usage, DAC / Rural / Tribal, Wildfire Zone, Medical Baseline
SCE	Income eligible households, Medical Baseline, Rural / Tribal / DAC, Disconnected, HTR / Seniors / Veterans	High usage	None
SoCalGas	Income eligible households	First time treatments, high usage, Seniors / Veterans / HTR, Medical Baseline, Rural / Tribal / DAC	CARB Community Air Protection
SDG&E	Income eligible households	Income eligible households	High usage, Medical Baseline, DAC, CARB Community Air Protection, Disconnected, Wildfire Zones,

ATTACHMENT 4

ATTACHMENT 4 – Energy Savings Assistance Program’s Multifamily Whole Building Program Solicitation Process

Summary: This attachment contains guidance for the Multifamily Whole Building (MFWB) programs solicitation process. The MFWB programs solicitation process is subject to the determinations on solicitations and contractor selection in Sections 6.14 and 7.9. The solicitation phases of Request for Proposal (RFP), Selection Criteria and Scoring, and Contract and Program Plan, as described in this Attachment and not specifically detailed as part of Section 7.9 of this decision, may be periodically amended or updated by Energy Division (ED) Staff. ED Staff shall keep the most updated version of this attachment available at: <https://www.cpuc.ca.gov/iqap/>.

Contents:

1. Solicitation Process Overview and Roles
 - a. *Independent Evaluator*
 - b. *Procurement Review Group*
 - c. *Lead IOU Role*
2. Request for Proposal
3. Selection Criteria and Scoring
4. Contract and Program Plan
5. Timeline and Advice Letter Submittal

1. Solicitation Process Overview and Roles

The IOUs shall run two solicitation processes to select implementers for the Northern and Southern MFWB programs. The solicitation processes will utilize a single stage RFP followed by a two-step selection process. The two-step selection process includes Step 1: after receipt of the RFP submissions, selecting a smaller pool which proceed to Step 2: selected bidders invited to answer specific questions and provide presentations during in-person and/or video/tele-conferenced interviews. After Step 1 and Step 2, the final bidder is selected for contract negotiations.

There will be one statewide Independent Evaluator (IE) and one low-income statewide Procurement Review Group (PRG), selected per the requirements in Section

ATTACHMENT 4 – Energy Savings Assistance Program’s Multifamily Whole Building Program Solicitation Process

7.9 of this decision. As per Section 7.9, PG&E will run the solicitation process for the Northern MFWB program and SDG&E will run the solicitation process for the Southern MFWB program. Additionally, we direct the following roles as such for the purposes of the MFWB program solicitation:

A. Independent Evaluator

Lead IOUs shall contract a statewide IE with energy efficiency, multifamily, and low-income sector expertise. It is acceptable for the IOUs to select an appropriate statewide IE from their current IE pool.¹ The lead IOUs shall jointly inform the Director of the Commission’s Energy Division (Director) of its selected IE via an email letter. The Director may approve the selected IE via email or, if warranted, may order the IOUs to conduct another solicitation for an IE or take other action. The IE shall be contracted prior to the launch of the RFP. The IE shall provide at least the following services:

- Consultation and support to the PRG, especially Energy Division staff.
- For each solicitation, a monthly report on its status and progress to be presented to the PRG.
- For each solicitation, an individual final report to be submitted along with the Tier 2 advice letter seeking review of such contracts.
- A public final report on the overall process and conduct of the third party solicitations to be filed in the relevant low-income energy efficiency proceeding.

The IE is expected to provide unbiased assessment and feedback in providing its services. IE reports should fairly capture where there is agreement or disagreement. The IE should not have any conflicts of interest. Where not superseded here or in the

¹ IOUs were directed in D.18-01-004 to create a pool of qualified IEs for the third-party solicitations within the main Energy Efficiency Portfolios.

ATTACHMENT 4 – Energy Savings Assistance Program’s Multifamily Whole Building Program Solicitation Process

decision, the IE should follow the current version of the “EE-PRG Independent Evaluator Handbook.”²

B. Procurement Review Group

Refer to Section 7.9 for Commission direction on PRG member organizations³. It is the PRG’s responsibility to be involved at all levels in the solicitation process, including:

- Draft RFP review.
- Review of RFP bid selection criteria.
- RFP shortlist and selected bidder review.
- Review of interview questions and bidder responses.
- Review IE evaluations of all solicitations.
- Review of draft contract with program’s Implementation Plan.

The program design is not directed to be fully designed and delivered by a third-party, as such, the PRG can provide feedback and recommendations on the final program design, including available measures. The PRG should develop its own “Low-Income EE-PRG Group Charter”, using the “EE PRG Group Charter”⁴ as a guide and template.

Where not superseded here or in the decision, the PRG should follow the current version of the “EE-PRG Independent Evaluator Handbook”.⁵ The PRG is advisory and members must not have any conflicts of interest.

² ‘EE-PRG Independent Evaluator Handbook’ is available at the California Energy Efficiency Coordinating Committee website: <https://www.caecc.org/procurement-group>

³ PRG members are to be non-financially interested parties, and as such not meet the definition in D.05-01-055 which defines parties with financial interest.

⁴ ‘EE PRG Group Charter’ is available at the California Energy Efficiency Coordinating Committee website: <https://www.caecc.org/procurement-group>

⁵ ‘EE-PRG Independent Evaluator Handbook’ is available at the California Energy Efficiency Coordinating Committee website: <https://www.caecc.org/procurement-group>

ATTACHMENT 4 – Energy Savings Assistance Program’s Multifamily Whole Building Program Solicitation Process

C. Lead IOU Role

To help form this low-income statewide PRG, the lead IOUs will issue a notice to the service list, and related lists, informing them of the MFWB program solicitation and opportunity to participate in the PRG.⁶

We require the lead IOUs to conduct the PRG following these requirements:

- All meetings shall be noticed at least three business days in advance.
- Any materials to be discussed at the meeting shall be distributed at least three business days in advance to all PRG members and IE.
- Call number shall be provided to all participants.
- The PRG shall be consulted at all stages of the solicitation process, including, but not limited to:
 - Reviewing the solicitation plan;
 - Providing timely input into the draft solicitation language and evaluation criteria; and
 - Providing recommendations based on review of materials.

This process should rely upon the materials established for the Third-Party Process in the main Energy Efficiency Portfolio and modify them as appropriate for the low-income, multifamily sector per this Attachment and the decision. Rather than create parallel systems, the IOUs shall file their public materials regarding this solicitation process to the relevant energy efficiency and ESA/CARE application service lists and post them on the California Energy Efficiency Coordination Committee (CAEECC) website.

The lead IOU will have responsibility for:

- Program vision development, design/delivery, and intervention strategies;

⁶ SoCalGas Testimony (Rendler), page 11

ATTACHMENT 4 – Energy Savings Assistance Program’s Multifamily Whole Building Program Solicitation Process

- Procurement, contract administration, and co-funding management;
- Sole implementer oversight responsibilities including management, rewards, implementer performance review, and program performance review, and any necessary corrective actions;
- Meeting savings goals, treatment goals, and customer satisfaction levels;
- Metric development; and
- Reporting.

The lead IOU should utilize joint meetings of the IOUs, on a consultative basis to determine program vision, design/delivery, and implementation. We strongly encourage collaboration amongst the IOUs. The lead IOU shall still prioritize the PRG and IE recommendations on matters germane to their roles and responsibilities.

2. **Request for Proposal**

Prior to release of the RFP, the IOUs must jointly host at least one Bidders Workshop, which is not required to be in-person. The MFWB Bidders Workshop will inform bidders how to calculate cost-effectiveness for low-income programs, lessons learned from past programs, review relevant statutes, multifamily market characterization data⁷, and an overview of the solicitation scope.

Bidders must comply with the program eligibility, program design and delivery, measure, treatment goals, and energy savings goals requirements in Section 7.9 of the decision.

⁷ Necessary market data should include number of qualified low-income units and properties; average low-income multifamily household energy consumption data by climate zone; multifamily property counts by geography – urban, rural, tribal, and DAC; average multifamily property annual energy use non-deed restricted vs deed-restricted, and past multifamily ESA and ESA CAM program participation rates.

ATTACHMENT 4 – Energy Savings Assistance Program’s Multifamily Whole Building Program Solicitation Process

The lead IOUs, PRG and IE will collectively create the final RFP documents for each solicitation. All the IOUs shall provide certain information appended to the RFP package, and shall provide all bidders with a detailed scope of work for integrating with their Single Point Of Contact services (as applicable), the Multifamily Application Portal, and provision of the ESA basic in-unit measures, as well as the customer segment definitions. Bidder proposals must include provision of ancillary services and minor repairs (as defined in Section 7.9).

This solicitation process will support fair and open access to new entrants. As such, if the RFP requires bidders to submit cost-effectiveness assessments, then each lead IOU must offer a cost-effective test (CET)⁸ curing phase after receiving bids whereby 1) the lead IOU reviews and provides information to each bidder on their CET scoring identifying and instructing how to correct errors and 2) all bidders can submit one CET revision. This CET curing process will occur prior to RFP scoring and review.

3. Selection Criteria and Scoring:

Scoring criteria must be in keeping with Public Utility Code statute⁹ and in alignment with the ESA portfolio goals adopted in this decision. We do not intend to preclude individual multifamily households from treatment. The MFWB programs must be as adept at providing in-unit services to an individual ESA household as they are addressing the needs of a large multifamily property owner or developer with multiple sites, and on a property that may not even be in the plan/ pipeline for whole building treatment. The scoring criteria must reflect this. Where proposed, the IOU’s selection/scoring criteria in their applications are denied in favor of working with the PRGs to determine the criteria. The IOU’s proposed criteria in their applications are not prohibited from use.

⁸ Refers to use ESACET for in-unit measures and TRC for all measures

⁹ Public Utility Code Section 327(b)

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4. Contract and Program Plan:

The Contract must utilize the Standard Terms detailed in Attachment A of D.18-10-008. The Contract will include a Program Summary and must be accompanied by a basic Implementation Plan. The Implementation Plan¹⁰ will contain at a minimum:

- Program Description.
- Program Manual: eligible measures, customer eligibility requirements, contractor eligibility requirements, additional services, and audits, and other program metrics.
- Program Theory and Program Logic Model.
- Incentive Tables and Workpapers.
- Quantitative Program Targets.
- Diagram of Program.

5. Timeline and Advice Letter Submittal

The following dates provide a general framework and essential requirements.

- The lead IOUs must send by email its IE selection to the Commission’s Energy Division Director via email 90 days after the decision.
- The lead IOUs must submit a final PRG list to Commission’s Energy Division Director via email 90 days after the decision.
- The lead IOUs should finalize any updates to the PRG Group Charter within six months following the decision. At that time, the lead IOUs shall send the final PRG member list and updated low-income PRG Charter to the proceeding information list. This low-income PRG Charter will also be posted on the CAEECC website.
- At least one month prior to the due date for bidder responses to the MFWB RFP, the IOUs will host a joint Bidders Workshop.

¹⁰ These requirements are derived from Energy Division’s “Implementation Plan Template Guidance 2.0” (May 2020)

ATTACHMENT 4 – Energy Savings Assistance Program’s Multifamily Whole Building Program Solicitation Process

- The RFP process should take approximately nine months, including contract negotiations.
- After the solicitation process, the lead IOUs must submit a Tier 2 Advice Letter, with final program package, within 15 days after contract execution and at a date no later than by November 30, 2022. This advice letter will contain executed contract, program design plan (including measures), goals for energy savings and treatments, cost-effectiveness, a statement on any ESA Portfolio impacts, and the IE’s Final Solicitation Report. Energy Division may create an advice letter template.
- As per Section 7.9, the finalized MFWB program is authorized to begin no sooner than January 1, 2023, contingent on MFWB contract advice letter approval.

It is expected that during the PRG review process, Energy Division and the IE will support the lead IOUs to ensure a program implementation plan meets all existing statutes and this decision.

The contract will not be considered finalized until the advice letter is approved. The executed contract and IE Report may be considered confidential in-full or in-part, but the program’s Implementation Plan (including measure types), treatment goals, energy savings goals, cost-effectiveness, and program budget are not confidential. If this information is part of redacted materials, then it must be shared in the body of the advice letter.

Energy Division staff will review all advice letter materials for conformance with statute,¹¹ this decision, and that the solicitation process was fair and transparent. We elaborate further that the process will be reviewed to confirm that the contract is not a result of a biased solicitation process and that the solicitation did not thwart the intentions of a successful program design, delivery, and realized savings. The review is not centered on the program design and delivery, unless it violates mandates.

¹¹ In addition to the statutes governing rate collections and program offerings for income qualified programs, Public Utility Code 327(b) is about the solicitation process.

ATTACHMENT 5

ATTACHMENT 5 – ACRONYMS REFERRED IN DECISION

3P	Third party
AB	Assembly Bill
AC	Air conditioning
AL	Advice Letter
ALJ	Administrative Law Judge
AMI	Area Median Income
AMP	Arrearage Management Plan
BBA	Baseline Balancing Account
BE	Building Electrification
BPC	Best Practices Collaborative
BUILD	Building Initiative for Low Emissions Development program
CAEECC	California Energy Efficiency Coordinating Committee
CAM	Common Area Measures (ESA)
CARB	California Air Resources Board
CARE	California Alternate Rates for Energy program
CBO	Community Based Organization
CCA	Community Choice Aggregators
CCC	Customer Contact Center
CEDARS	Comprehensive Education Data and Research System
CET	Cost Effectiveness Test
CETF	California Emerging Technology Fund
CHANGES	Community Help and Awareness for Natural Gas and Electric Services programs
CHEEF	California HUB for Energy Efficiency Financing
CIS	Customer Information System
CSD	Community Services and Development
CWR	Career & Workforce Readiness
CZ	Climate Zone
DAC	Disadvantaged Communities

ATTACHMENT 5 – ACRONYMS REFERRED IN DECISION

DAC-SASH	Disadvantaged Communities – Single-Family Solar Homes
DHHS	Department of Health and Human Services
ED	Energy Division
EE	Energy efficiency
EM&V	Evaluation, Measurement and Verification
ENA	Energy Advisor
ESA	Energy Savings Assistance program
ESA WG	ESA Working Group
ESACET	Energy Savings Assistance program Cost Effectiveness Test
ESJ	Environmental and Social Justice
ESP	Energy Solutions Partner network
EUL	Expected Useful Life
FERA	Family Electric Rate Assistance program
FPG	Federal Poverty Guidelines
GHG	Greenhouse Gas
GRC	General Rate Case
HCS	Health Comfort and Safety
HER	Home Energy Report
HTR	Hard to Reach
HU	High usage
HVAC	Heating, ventilation, and air conditioning
IE	Independent Evaluator
IOU	Investor-Owned Utilities
IS	Installation Standards manual
IVR	Integrated Voice Response
LED	Light Emitting Diode
LEP	Limited English Proficient
LIFT	Low-Income Families and Tenants pilot
LIHEAP	Low Income Home Energy Assistance Program

ATTACHMENT 5 – ACRONYMS REFERRED IN DECISION

LINA	Low Income Needs Assessment
LIOB	Low Income Oversight Board
LIPPT	Low-Income Public Purpose Test
LIWP	Low-Income Weatherization Program
M&E	Measurement and Evaluation
MASH	Multi-Family Affordable Solar Homes program
ME&O	Marketing, Education, and Outreach
MF	Multifamily
MFEER	Multifamily Energy Efficiency Rebate program
MFWB	Multifamily Whole Building
MIDI	Middle-Income Direct Install
MOU	Memorandum of Understanding
NEB	Non-Energy Benefit
NPV	Net Present Value
OIR	Order Instituting Rulemaking
P&G	Potential & Goals
P&P	Practice and Procedure manual
PEV	Post-enrollment Verification
PG&E	Pacific Gas and Electric Company
PHC	Prehearing Conference
POA	Property Owner Approvals / Authorization
PRG	Procurement Review Group
PSPS	Public Safety Power Shutoff
RFA	Request for Abstracts
RFP	Request for Proposals
SCE	Southern California Edison Company
SDG&E	San Diego Gas & Electric Company
SEVI	Socioeconomic Vulnerability Index
SGIP	Self-Generation Incentive Program

ATTACHMENT 5 – ACRONYMS REFERRED IN DECISION

SNAP	Supplemental Nutrition Assistance Program (CalFresh)
SoCalGas	Southern California Gas Company
SOMAH	Solar on Multifamily Affordable Housing
SPOC	Single Point of Contact
TEAM	Telecommunications Education and Assistance in Multiple-Languages Program
UAS	Universal Application System
WE&T	Workforce, Education and Training
WIC	Special Supplemental Nutrition Program for Women, Infants and Children

ATTACHMENT 6

**Energy Savings Assistance and California Alternate Rates for Energy
Programs and Budgets for 2021-2026 Program Years
(Application 19-11-003, and related matters)**

Joint Stipulation – 01: Affordable Internet Education and Outreach

**California Emerging Technology Fund (CETF), Pacific Gas & Electric
Company (PG&E), San Diego Gas & Electric Company (SDG&E), Southern
California Edison Company (SCE), and Southern California Gas Company
(SoCalGas)**

**Witnesses: Sunne McPeak (CETF), Erik Olsen (PG&E), Horace (Ty) Tantom
IV (SDG&E), Eugene Ayuyao (SCE), and Octavio Verduzco (SoCalGas)**

A.19-11-003, et al

Joint Stipulation- Affordable Broadband Internet Education and Outreach

CETF, PG&E, SCE, SDG&E, and SoCalGas

CETF was the only party to propose a requirement for affordable broadband offer education and outreach in A.19-11-003, et al. Southern California Gas Company (“SoCalGas”), San Diego Gas and Electric Company (“SDG&E”), Pacific Gas and Electric Company (“PG&E”), Southern California Edison Company (“SCE”), and California Emerging Technology Fund (“CETF”) (collectively, the “Parties”) respectfully submit this Joint Stipulation in the above-referenced proceeding.

On September 30, 2020, the Parties met via teleconference. The Parties worked collaboratively to reach consensus on the affordable broadband offer education and outreach issue scoped within the proceeding.¹ The Parties believe this compromise outcome is reasonable considering the entire record in this proceeding and reflects a fair and balanced compromise of the Parties’ proposals. Accordingly, the Parties agree to the Joint Stipulation in A.19-11-003, et al. for the 2021- 2026 program year, and recommend the following, in lieu of litigating these issues:

1. Affordable Broadband Marketing, Education and Outreach:

The Joint Investor Owned Utilities² (“IOUs”) will, for A.19-11-003, et al, program years 2021 through 2026:

- a. Add a telephone number and web link designated by CETF such as

<https://www.everyoneon.org/getconnected> to a relevant location on their

respective company website. A “relevant” location may include, in the sole

¹ Assigned Commissioner’s Scoping Memo and Ruling, Issue Y, P. 6.

² PG&E, SDG&E, SCE, and SoCalGas.

discretion of each IOU, the Joint IOUs' respective CARE, FERA, and/or ESA webpage. The Joint IOUs will retain control over their respective websites, designs, and messaging. CETF and the IOUs each agree to meet quarterly each year of the 2021-2026 program cycle.

- b. Integrate broadband affordable offer messaging twice annually in select existing - CARE, Family Electric Rate Assistance ("FERA") and/or ESA direct marketing materials as determined in the sole discretion of each IOU. Examples of direct marketing materials may include email newsletters, direct mail, community resource guides, and bill inserts or onserts. The broadband affordable offer messaging shall consist of approximately 1-2 lines of text within a given piece of marketing material. The IOUs are not required to include separate or stand-alone broadband affordable offer messaging with their direct marketing materials. Each IOU will determine the most appropriate strategy to integrate broadband message placement and prominence in a given piece of marketing material. There is no expectation that each IOU have the same amount or scope of direct marketing. Integrating broadband messaging in IOU marketing material assumes this specific work will be done at minimal or no cost to the ratepayer.
- c. Incorporate CETF affordable broadband materials in ESA education kits. The CETF materials shall be developed, funded, and provided by CETF. The IOUs' respective ESA contractors will have no expectation of answering questions or educating customers on issues related to broadband marketing, eligibility criteria. ESA contractors may refer the customer to the CETF materials and contact information should such questions arise. Once a year, CETF may conduct an

orientation at ESA contractor workshops to educate them on the Digital Inclusion goal of the broadband offer information.

- d. Help educate Community Based Organizations (“CBO”) by inviting CETF to speak and present at a minimum of one CBO training workshop or Marketing Education & Outreach (“ME&O”) meeting annually. Once connected to the network of CBOs, CETF may (1) coordinate with CBOs directly to provide CETF-created and funded marketing materials for CBO distribution to assistance recipients (e.g., handouts at food banks, etc.), and (2) collaborate with CETF-identified Digital Inclusion CBOs. Except for the IOU/CBO ME&O event collaboration, all other CBO coordination should be considered outside of the IOU’s purview to manage, mediate, and organize, and outside any IOU-CBO contract activity. Joint IOUs assume no responsibility or liability for any act or failure to act of any CBO in any relationship that may be formed between a CBO and CETF.
- e. Once a year within the low-income program annual report filing, each IOU will provide the number of CARE customers and how many of those CARE customers have emails on file. Also, in the annual report, each IOU will describe their activities in accordance with this Joint Stipulation relating to affordable broadband offer education, including the number of CARE, ESA and FERA customers reached by each activity.

2. Costs:

- a. As a condition precedent to the IOUs’ obligation to comply with Sections 1a through 1e above, the IOUs will require Commission approval of this Joint

Stipulation. The IOUs' respectively have pending requests for marketing, education, and outreach (ME&O) budgets for CARE, ESA and FERA activities for the PY 2021-2026 cycle. The IOUs' request Commission authorization to access and use these MEO approved budgets in the 2021-2026 cycle to subsidize the minimal costs for certain tasks detailed in this Joint Stipulation. These certain tasks include, but are not limited to, sorting materials, distribution, postage, internal labor to coordinate marketing and website design, and costs associated with assembling ESA educational kits.

- b. As noted in Section 1.b. above, the IOUs anticipate that integrating broadband affordable offer messaging into their direct marketing materials can be accomplished at minimal or no cost to the ratepayer. However, to the extent that minimal costs for these activities exist, the Parties agree to incorporate broadband discount marketing messages into existing marketing materials in compliance with this Joint Stipulation and at the sole discretion of each IOU.
- c. Any incremental costs related to co-marketing tactics (such as standalone CETF materials, production, language translation for standalone materials, distribution, etc.) would be funded by CETF and not funded by IOUs ratepayers, unless expressly preapproved and agreed upon by the IOUs and subsequently authorized by the CPUC to use CARE/FERA/ESA marketing dollars to subsidize costs for above items. Any additional proposed co-marketing or co-promotions outside of this Joint Stipulation would require CETF funding.

3. Procedural Matters

- a. This Joint Stipulation is subject to and requires Commission approval, including to authorize the IOUs to use CARE/FERA/ESA dollars for affordable broadband offer marketing pursuant to Section 2 above.
- b. Order Instituting Rulemaking (“OIR”) 20-09-001 Regarding Broadband Infrastructure Deployment and to Support Service Providers in the State of California
This Joint Stipulation will remove further affordable broadband matters from this proceeding (A.19-11-003, et al.). Any ongoing discussions regarding further affordable broadband matters should take place within the recently issued OIR 20-09-001 Regarding Broadband Infrastructure Deployment and to Support Service Providers in the State of California.³
- c. Each IOU will exercise independent judgment and discretion in determining the most appropriate means for implementing the agreements in this Stipulation.
- d. The Parties agree to exchange point of contact information with each other regarding implementation of this Joint Stipulation.
- e. This Joint Stipulation does not constitute and should not be used as a precedent regarding any principle or issue in this proceeding or in any future proceeding.
- f. The Parties agree that this Joint Stipulation is reasonable considering the testimony submitted, consistent with law, and in the public interest.
- g. This Joint Stipulation may be amended or changed only by a written agreement signed by the Parties.
- h. Nothing in this Joint Stipulation shall have the effect of diluting the Joint IOUs’ messaging for their respective income-qualified programs.

³ Rulemaking (“R”).20-09-001.

4. Conclusion

SoCalGas confirms that representatives of the Joint Parties have authorized SoCalGas to submit this Joint Stipulation on behalf of their respective organization. This concludes the Joint Stipulation.

<p>SOUTHERN CALIFORNIA GAS COMPANY</p> <p></p> <p>By: _____</p> <p>BRIAN PRUSNEK Director, Customer Programs & Assistance</p>	<p>SAN DIEGO GAS & ELECTRIC COMPANY</p> <p>By: <u>/s/ Alex Kim</u></p> <p>ALEX KIM Director of Customer Programs and Business Services</p>
<p>PACIFIC GAS AND ELECTRIC COMPANY</p> <p>By: </p> <p>JAMIE CHESLER Senior Manager, Marketing Strategy</p>	<p>SOUTHERN CALIFORNIA EDISON COMPANY</p> <p>By: </p> <p>MICHAEL K. BUSHEY Director, Customer Programs & Services</p>
<p>CALIFORNIA EMERGING TECHNOLOGY FUND</p> <p></p> <p>By: _____</p> <p>SUNNE WRIGHT McPEAK President and CEO</p>	

ATTACHMENT 7

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EXHIBIT LIST

<u>Exhibit Number</u>	<u>Description</u>	<u>Date Identified</u>	<u>Date Received/Withdrawn</u>	<u>Sponsor/Witness</u>
CTF-1	Intervenor Testimony of Sunne Wright McPeak, President and CEO, California Emerging Technology Fund.			
Enervee-1	Prepared Testimony of Anne Arquit Niederberger On Behalf of Enervee			
Enervee-2	Rebuttal Testimony of Enervee on The Energy Savings Assistance Program			
Enervee-3	2019 California Energy Efficiency Action Plan (cited in Enervee-1, pp. 3, 5-6 and in prior filings and Enervee-2)			
Enervee-4	SB 350 Low-Income Barriers Study (Part A) (cited in Enervee-1, pp. 5, 12)			
Enervee-5	DNV GL presentation to the EM&V Stakeholder Quarterly Meeting entitled “2019 California Residential Appliance Saturation Survey (RASS)”(cited in Enervee-2, pp. 2-3)			
Enervee-6	CPUC Resolution E-4820 (cited in Enervee-1, p. 5)			
Enervee-7	Transcript of the 2017 IEPR- 08 Joint Agency Workshop on Senate Bill 350 Low-Income Barriers Study Implementation			
Enervee-8	Enervee comments on empowering low-income households to manage their energy (cited in Enervee comments on Staff Proposal, p. 3 and in other filings)			
Enervee-9	LI Wrap-Up Workshop Meeting notes actions parking Final 06152020PM (cited in Enervee comments on Staff Proposal, p. 3)			
Enervee-10	Empowering Low-Income Customers to Shop Energy- Smart at Scale (cited in most, if not all of Enervee’s testimony)			
Cal Advocates-1A	Amended Prepared Testimony on Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE) Programs and Budgets for Program Years 2021-2026 – SCE and SoCalGas ESA Administrative Budgets and Measure Costs, and IOU ESA Cost-Effectiveness Thresholds, Energy Education, and CARE Programs (Public)			Stanley Kuan
Cal Advocates- 1A-C	Amended Prepared Testimony on Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE) Programs and Budgets for Program Years 2021-2026 – SCE and SoCalGas ESA Administrative Budgets and Measure Costs, and IOU ESA Cost-Effectiveness Thresholds, Energy Education, and CARE Programs (Confidential)			Stanley Kuan
Cal Advocates-2A	Amended Prepared Testimony on Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE) Programs and Budgets for Program Years 2021-2026 – SDG&E and PG&E ESA Program Administrative Budgets, Measure Costs, and Cost-Effectiveness (Public)			Jenneille Hsu
Cal Advocates- 2A-C	Amended Prepared Testimony on Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE) Programs and Budgets for Program Years 2021-2026 – SDG&E			Jenneille Hsu

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	and PG&E ESA Program Administrative Budgets, Measure Costs, and Cost-Effectiveness (Confidential)			
Cal Advocates-3	Prepared Testimony on The Multifamily Programs in Energy Savings Assistance (ESA) and California Alternate Rates (CARE) Programs and Budgets for Program Years 2021-2026			Jenneille Hsu
<u>CPED Exhibit Number</u>	<u>Description</u>	<u>Date Identified</u>	<u>Date Received/Withdrawn</u>	<u>Sponsor/Witness</u>
Cal Advocates-4	Prepared Testimony on Pacific Gas and Electric Company's and San Diego Gas & Electric Company's Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE) Programs and Budgets for Program Years 2021-2026 – Third-Party Procurement Mechanism (Public)			Shelly Lyser
Cal Advocates-4-C	Prepared Testimony on Pacific Gas and Electric Company's and San Diego Gas & Electric Company's Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE) Programs and Budgets for Program Years 2021-2026 – Third-Party Procurement Mechanism (Confidential)			Shelly Lyser
Cal Advocates-5	Rebuttal Testimony on Applications of Energy Savings Assistance (ESA) and California Alternate Rates (CARE) Programs and Budgets for Program Years 2021-2026			Shelly Lyser, Stanley Kuan, and Jenneille Hsu
Cal Advocates-6	SCE Response to Cal Advocates data request A.19-11-003 ESA_CARE-SK8- SCE22			
Cal Advocates-7	Selected Slides from October 8, 2020 Guidehouse Presentation on Market Studies, BROs, & Low Income - 2021 Potential and Goals			
MCE-1 (revised)	Testimony of Marin Clean Energy Regarding its Application for Approval of its Multifamily Whole Building Program Under the Energy Savings Assistance Program 2021-2026			
MCE-2	Rebuttal Testimony of Marin Clean Energy Regarding its Application for Approval of its Multifamily Whole Building Program Under the Energy Savings Assistance Program 2021-2026			
EEC-1A	Testimony of Allan Rago On The 2021–2026 Energy Savings Assistance Program and California Alternate Rates for Energy Program Budget Applications of Pacific Gas And Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, Southern California Gas Company.			
EEC-2A	Testimony of Anna Solorio On The 2021–2026 Energy Savings Assistance Program and California Alternate Rates for Energy Program Budget Applications of Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, Southern California Gas Company			
EEC-3A	Rebuttal Testimony of The Energy Efficiency Council (EEC), The East Los Angeles Community Union (Telacu), The Maravilla Foundation and The Association of California			

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	Community and Energy Services (Acces) To Intervenor Testimonies Regarding The 2021–2026 Energy Savings Assistance Program and California Alternate Rates For Energy Program Budget Applications Of Pacific Gas And Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, Southern California Gas Company			
TELACU-01	The Testimony of Richard Villasenor on behalf of The East Los Angeles Community Union (TELACU), the Association of California Community and Energy Services (ACCES), and the Maravilla Foundation			
TELACU-02	Rebuttal Testimony of The Energy Efficiency Council (EEC), The East Los Angeles Community Union (Telacu), The Maravilla Foundation and The Association of California Community and Energy Services (Acces) To Intervenor Testimonies Regarding The 2021–2026 Energy Savings Assistance Program And California Alternate Rates For Energy Program Budget Applications Of Pacific Gas And Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, Southern California Gas Company.			
SCE-01	Testimony Supporting Policy Considerations for Southern California Edison Company’s Energy Savings Assistance (ESA) and California Alternative Rates for Energy (CARE) Programs and Budgets for Program Years 2021-2026			
SCE-02	Testimony Supporting Southern California Edison Company’s Energy Savings Assistance (ESA) Program and Budget for Program Years 2021-2026			
SCE-03	Testimony Supporting Southern California Edison Company’s California Alternate Rates for Energy (CARE) and Family Electric Rate Assistance (FERA) Programs and Budgets for the Program Years 2021-2026			
SCE-04	Testimony Supporting Southern California Edison Company’s Workforce Education and Training (WE&T) Program and Budget for the Program Years 2021- 2026			
SCE-05	Testimony Supporting Southern California Edison Company’s Policy for the Energy Savings Assistance (ESA) and California Alternative Rates for Energy (CARE) Programs			
SCE-06	Testimony Supporting Southern California Edison Company’s Policy for the Energy Savings Assistance (ESA) and California alternative Rates for Energy (CARE) Programs, Appendices			
SCE-07	Rebuttal Testimony of Southern California Edison Company’s Energy Savings Assistance (ESA) and California Alternate Rates for Energy Programs and Budgets for Program Years 2021-2026			
SCE-08	SCE Response to Data Request No. TURN-SCE-01 -016			
SCE-09	SCE Response to Data Request No. TURN-SCE-01 -018			
SCE-10	SCE Response to Data Request No. TURN-SCE-01 -019			

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SCE-11	SCE Response to Data Request No. TURN-SCE-02 -008			
SCE-12	SCE Response to Data Request No. CalAdvocates- ESA_ CARE-SK8-SCE12-001			
SCE-13	SCE Response to Data Request No. CalAdvocates- ESA_ CARE-SK8-SCE12-005			
SCE-14	SCE Response to Data Request No. CalAdvocates- ESA_ CARE-ER-SCE18-001			
SCE-15	SCE Response to Data Request No. CalAdvocates- ESA_ CARE-ER-SCE18-002			
SCE-16	SCE Response to Data Request No. CalAdvocates- ESA_ CARE-ER-SCE18-003			
<u>CPED Exhibit Number</u>	<u>Description</u>	<u>Date Identified</u>	<u>Date Received/Withdrawn</u>	<u>Sponsor/Witness</u>
JP-1	Opening Testimony of Jeanne Clinton and Lara Ettenson			
JP-2	Opening Testimony of Lindsay Robbins			
JP-3	Opening Testimony of Andrew Brooks			
JP-4	Opening Testimony of Mohit Chhabra			
JP-5	Opening Testimony of Betony Jones			
JP-6	Opening Testimony of Veena Singla			
JP-Rebuttal-1	Rebuttal Testimony of Jeanne Clinton and Lara Ettenson			
JP-Rebuttal- 1A	Rebuttal, Att. A, LEAN Multifamily Affordability Agreement			
JP-Rebuttal- 1B	Rebuttal, Att. B., LIWP Property Affordability Covenant			

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JP-Rebuttal- 1C	Rebuttal, Att. C, NYSERDA Multifamily Performance Program – Terms and Conditions			
JP-7	ESA Program Workshop as a part of the 2021-2026 Low- Income Application 5/20/2020: Day-1			
JP-8	Energy Savings Assistance (ESA) Goals Proposal for Program Years – CPUC Energy Division Syreeta Gibbs, Kapil Kulkarni, Sarah Lerhaupt & Jason Symonds -- May 20, 2020			
JP-9	ESA Workshop as a part of 2021-2026 Low-Income Application 5/21/2020: Day-2			
JP-10	Low Income Wrap-Up Workshop as a part of the 2021-2026 Low Income Applications			
1	Free Energy Savings Company LLC: Testimony of Alma Gonzalez On The 2021–2026 Energy Savings Assistance Program And California Alternate Rates For Energy Program Budget Applications Of Pacific Gas And Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, Southern California Gas Company.			
SDGE-01	Prepared Direct Testimony of Alex Kim on behalf of San Diego Gas & Electric Company’s Policy – Energy Savings Assistance Program, California Alternate Rates for Energy Program, and Family Energy Rate Assistance Program Plans and Budgets for Program Years 2021 through 2026			
<u>CPED Exhibit Number</u>	<u>Description</u>	<u>Date Identified</u>	<u>Date Received/Withdrawn</u>	<u>Sponsor/Witness</u>
SDGE-02	Prepared Direct Testimony of Sara Nordin on behalf of San Diego Gas & Electric Company’s Energy Savings Assistance Program Plans and Budgets for Program Years 2021 through 2026			
SDGE-03	Prepared Direct Testimony of Sara Nordin on behalf of San Diego Gas & Electric Company’s California Alternate Rates for Energy Program Plans and Budgets for Program Years 2021 through 2026			
SDGE-04	Prepared Direct Testimony of Sara Nordin on behalf of San Diego Gas & Electric Company’s Family Electric Rate Assistance Program Plans and Budgets for Program Years 2021 through 2026			
SDGE-05	Prepared Direct Testimony of Horace Tantum IV on behalf of San Diego Gas & Electric Company’s Low-Income Customer Assistance Programs Marketing, Education and Outreach Plans for Program Years 2021 through 2026			
SDGE-06	Prepared Rebuttal Testimony of Alex Kim on behalf of San Diego Gas & Electric Company Re Policy – Energy Savings Assistance Program, California Alternate Rates for Energy Program, and Family Energy Rate Assistance Program Plans and Budgets for Program Years 2021 through 2026			

ATTACHMENT 7 EXHIBIT LIST

SDGE-07	Prepared Rebuttal Testimony of Sara Nordin on behalf of San Diego Gas & Electric Company Re Energy Savings Assistance Program Plans and Budgets for Program Years 2021 through 2026			
SDGE-08	Prepared Rebuttal Testimony of Sara Nordin on behalf of San Diego Gas & Electric Company Re California Alternate Rates for Energy Program Plans and Budgets for Program Years 2021 through 2026			
SDGE-09	Prepared Rebuttal Testimony of Brenda Gettig on behalf of San Diego Gas & Electric Company Re ESACET and Cost Effectiveness			
SDGE-10	Prepared Rebuttal Testimony of Horace Tantom IV on behalf of San Diego Gas & Electric Company Re Low- Income Customer Assistance Programs Marketing, Education and Outreach Plans for Program Years 2021 through 2026			
SDGE-11	SDG&E Response to Data Request No. TURN-SDG&E-1 (Q2, Q6, Q10 & Q11)			
SDGE-12	SDG&E Response to Data Request No. TURN-SDG&E-3 (Q1)			
SDGE-13	SDG&E Response to Data Request No. TURN et al DATA REQUEST No. TURN-SDGE-04 (Q5 & Q6)			
SDGE-14	SDG&E Response to Data Request No. CalAdvocates- ESA_CARE_EPF-SDGE01 (Q14)			
SDGE-15	SDG&E Response to Data Request No. CalAdvocates- ESA_CARE_EPF-SDGE03 (Q18) PUBLIC VERSION			
SDGE-15C	SDG&E Response to Data Request No. CalAdvocates- ESA_CARE_EPF-SDGE03 (Q18) CONFIDENTIAL VERSION			
SDGE-16	SDG&E Response to Data Request No. CalAdvocates- ESA_CAR			
SDGE-17	SDG&E Response to Data Request No. CalAdvocates- ESA_CARE_EPF-SDGE05 (Q6 & Q22)			
SDGE-18	SDG&E Response to Data Request No. CalAdvocates- ESA_CARE_JSU-SDGE13 (Q4)			
SDGE-19	SDG&E Response to Data Request No. CalAdvocates- ESA_CARE_JSU-SDGE15 (Q1 & Q2)			
TURN-1	Prepared Testimony of Alice Napoleon Addressing Utility Proposals Related to ESAP			

ATTACHMENT 7 EXHIBIT LIST

TURN-2	Prepared Testimony of Hayley Goodson Addressing Utility Proposals and Practices Related to CARE			
TURN-3	Rebuttal Testimony of Alice Napoleon Addressing Proposals Related to ESAP			
TURN-4	Rebuttal Testimony of Hayley Goodson Addressing Certain Intervenor Proposals Related to CARE and ESAP			
TURN-5	SDG&E Response to Data Request TURN-SDG&E-01, Q20			
TURN-6	SCE Response to Data Requests TURN-SCE-01, Q3; TURN-SCE-02, Q2; TURN-SCE- 03, Q5, Q6, Q15			
TURN-7	SoCalGas Response to Data Requests TURN-SoCalGas-01, Q4; TURN-SoCalGas-02, Q3; TURN-SoCalGas-03, Q5, Q6, Q16			
TURN-8	PG&E Response to Data Requests TURN-PG&E-01, Q14; TURN-PG&E-04, Q5, Q6			
TURN-9	NRDC/NCLC Response to Data Request TURN-JointParties-01			
TURN-10	SDG&E Response to Data Request TURN SDG&E-05			
TURN-11	SCE Response to Data Request TURN-SCE-05			
TURN-12	SoCalGas Response to Data Request TURN-SoCalGas-04, Q1-3, 5			
TURN-13	PG&E Response to Data Request TURN-PG&E-05			
SCG-01	Prepared Direct Testimony of Mark Aguirre and Erin Brooks on the Energy Savings Assistance Program on behalf of Southern California Gas Company			
SCG-02	Prepared Direct Testimony of Octavio Verduzco on the California Rates for Energy on behalf of Southern California Gas Company			
SCG-03	Revised Prepared Direct Testimony of Mark Aguirre and Erin Brooks on the Energy Savings Assistance Program on behalf of Southern California Gas Company			
SCG-04	Prepared Rebuttal Testimony of Octavio Verduzco on behalf of Southern California Gas Company			

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SCG-05	Prepared Rebuttal Testimony of Mark A. Aguirre and Erin P. Brooks on behalf of Southern California Gas Company			
SCG-06	Prepared Rebuttal Testimony of Erin P. Brooks on behalf of Southern California Gas Company			
PGE-001	Entire Volume of PG&E Prepared Testimony			
PGE-002	Entire Volume of PG&E Amendment to Prepared Testimony dated August 7, 2020			
PGE-003	Entire Volume of PG&E Supplemental Testimony			
PGE-003A	PG&E Supplemental Testimony Statement of Qualifications			
PGE-004	Entire Volume of PG&E Rebuttal Testimony (Includes Public version of PGE-004A)			
PGE- 004A_CONF	Confidential Attachments to Rebuttal Testimony			
PGE- 005_PUBLIC	PG&E Workpapers (PG&E's redacted version of its response to CalAdvocates004-Q1)			
PGE- 005_CONF	PG&E Workpapers as initially served in PG&E's response to CalAdvocates004-Q1 and limited to the following: CET_SAVINGS_MODEL_PY 2021_2020-10-24_CONF CET_SAVINGS_MODEL_PY 2022_2020-10-24_CONF CET_SAVINGS_MODEL_PY 2023_2020-10-24_CONF CET_SAVINGS_MODEL_PY 2024_2020-10-24_CONF CET_SAVINGS_MODEL_PY 2025_2020-10-24_CONF CET_SAVINGS_MODEL_PY 2026_2020-10-24_CONF ESA_LATEST_MEASURE_MAPPING_2020-10-22_CONF			
PGE- 006_PUBLIC	PG&E Workpapers (PG&E's redacted version of its response to CalAdvocates004-Q01Supp01)			
PGE- 006_CONF	PG&E Workpapers. As initially served in response to CalAdvocates004-Q01Supp01 and limited to ESA 2021-2026 Proposed ATL Measures Budget_CONF			
PGE- 007_PUBLIC	PG&E Workpapers (PG&E's redacted version of its response to CalAdvocates004-Q01Rev01)			

ATTACHMENT 7 EXHIBIT LIST

PGE- 007_CONF	PG&E Workpapers As initially served in response to CalAdvocates004-Q01Rev01 and limited to the following CET_SAVINGS_MODEL_PY 2021_2020-08-14_CONF CET_SAVINGS_MODEL_PY 2022_2020-08-14_CONF CET_SAVINGS_MODEL_PY 2023_2020-08-14_CONF CET_SAVINGS_MODEL_PY 2024_2020-08-14_CONF CET_SAVINGS_MODEL_PY 2025_2020-08-14_CONF CET_SAVINGS_MODEL_PY 2026_2020-08-14_CONF			
PGE- 008_PUBLIC	(Redacted) Data Request Response and Attachments: LowIncomeProgramPY21-26_DR_PGE_CalAdvocates00 1, Q1_Budget Analysis_PGE (SK) CONF, Q2_CARE Attrition (SK), Q2 Responses and Attachments: Q2_PGE Workbooks (ESA Testimony 2 and 3) (JH) CONF			
PGE- 008_CONF	Data Request Response and Attachments limited to the following: LowIncomeProgramPY21-26_DR_PGE_CalAdvocates00 1, Q1_Budget Analysis_PGE (SK) CONF, Q2_PGE Workbooks (ESA Testimony 2 and 3) (JH) CONF			
PGE- 09_PUBLIC	(Redacted) Data Request Response and Attachments: PGE_CalAdvocates002_Cal Advocates responses and 10.5.20 UPDATE_PGE_ESACET_202 1-26_CONF and 10.5.20 Q2_PGE Workbooks (ESA Testimony 2 and 3) (JH) CONF			
PGE- 09_CONF	Data Request Response and Attachments: PGE_CalAdvocates002_Cal Advocates responses and 10.5.20 UPDATE_PGE_ESACET_202 1-26_CONF and 10.5.20 Q2_PGE Workbooks (ESA Testimony 2 and 3) (JH) CONF			
PGE-010	Data Request Response: PGE Discovery (Andy Brooks Responses) in response to Pacific Gas and Electric Company, First Set of Data Requests to Joint Parties			
PGE-011	Data Request Response: Joint Parties Responses to PGE Discovery 10.1.20.20 in response to Pacific Gas and Electric Company, First Set of Data Requests to Joint Parties			
PGE-012	Data Request Response and Attachment: TURN Response Low Income Program PY21- 26 _DR _PGETURN001 _ 9-23-20 and TURN ESA Workpapers in response to find PG&E's first data request to TURN (PGE_TURN001)			
PCF-001	Placeholder: Response by San Diego Gas & Electric Company to Data Request PCF-SDG&E-01 by The Protect Our Communities Foundation			
PCF-003	Energy Division Staff Proposal (Final) – June 2020 Energy Savings Assistance Program Goals for Years 2021-2026			
PCF-004	Roadmap to 100 Percent Local Solar Build-Out by 2030 in the City of San Diego			
La Cooperativa 01	Testimony Of Roberto Del Real On The 2021–2026 Energy Savings Assistance Program And California Alternate Rates For Energy Program Budget Applications Of Pacific Gas And Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, Southern California Gas Company.			

ATTACHMENT 7
EXHIBIT LIST

DR #1	SCE, PG&E and SDG&E count of CARE customers passing 400% electric baseline energy consumptions different number of times each year, 2016 to 2019			
DR #2	SCE FERA Yearly Enrollment and Penetration Goals for 2021 to 2026			
DR #3	SCE FERA Budget Table for 2021 to 2026			
DR #4	CHANGES Annual Report (2018 and 2019)			