

**BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA**

Application of Southern California Edison
Company (U338E) for Approval of its Energy
Savings Assistance and California Alternate
Rates for Energy Programs and Budgets for
Program Years 2015-2017.

And Related Matters.

Application 14-11-007
(Filed November 18, 2014)

Application 14-11-009
Application 14-11-010
Application 14-11-011

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

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Dated: May 1, 2018

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In accordance with Decisions 12-08-044 and 16-11-022, and the annual reporting directives contained therein, Pacific Gas and Electric Company files this Annual Report on the results of its Energy Savings Assistance and California Alternative Rates for Energy program efforts for the 2017 program year.

Respectfully submitted:

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ENERGY SAVINGS ASSISTANCE PROGRAM AND CALIFORNIA ALTERNATE RATES FOR ENERGY PROGRAM

2017 ANNUAL REPORT

May 1, 2018



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2017 Energy Savings Assistance Program and California Alternate Rates for Energy Program Highlights

Pacific Gas and Electric Company (PG&E)'s Energy Savings Assistance (ESA) Program has offered free energy efficiency programs to income-qualified customers in its 48 counties since 1983, serving 2,052,510 households. In 2017, PG&E's ESA Program provided 87,052 homes with energy efficiency improvements and services. Cumulatively, ESA participants saved over 69 mWh and 1.6 million therms.

The ESA Program's objective is to assist income-qualified customers in reducing their energy consumption and costs while increasing their comfort, health and safety. The ESA Program utilizes a prescriptive, direct install approach to provide free home weatherization, energy efficient appliances and energy education to income-qualified customers throughout PG&E's service area.

The ESA Program is available to income-qualified PG&E customers living in single family, multifamily, and mobile homes, including homeowners and renters. To qualify for the ESA Program, the total customer household income must be equal to or less than 200 percent of the Federal Poverty Guidelines, with income adjustments for family size.

Table 1 below provides a summary of Program Year (PY) 2017 ESA expenditures and accomplishments. Additional details on PG&E's ESA program are included in Section 1 of this annual report.

Summary Table 1 - ESA Program

2017 Energy Savings Assistance Program Summary			
2017	Authorized / Planning Assumptions ³	Actual	%
Budget ¹	\$154,671,971	\$122,778,059	79%
Funded from 2009-2016 Unspent Funds ²	\$30,416,596	\$2,377,763	8%
Summary Homes Treated	90,030	87,052	97%
Summary kWh Saved	47,000,000	59,263,365	112%
Summary kW Demand Reduced	55,000	69,550	126%
Summary Therms Saved	2,000,000	1,651,228	83%
First Touches Homes Treated ⁴		51,442	
- kWh Saved		31,457,458	
- kW Demand Reduced		33,528	
- Therms Saved		1,002,633	
Go-Backs/Retreated Homes ⁵		35,610	
- kWh Saved		27,805,907	
- kW Demand Reduced		36,022	
- Therms Saved		648,595	

¹ 2017 ESA Program budget from D.16-11-022 and updated by Commission Resolution G-3531 (December 21, 2017). Includes employee benefit costs approved in D.17-05-013, and a \$5,159 carry-forward adjustment, as described in ESA Table 1 footnotes 1-3, and ESA Table 12.

² Unspent funds authorized in Resolution G-3531 are shown in ESA Table 1A.

³ There were no authorized planning assumptions for First Touch or Re-Treated/Retreated homes in D.16-11-022.

⁴ 59% of customers treated in 2017 were First Touch customers.

⁵ 41% of customers treated in 2017 were Go-Back customers.

In addition to the ESA program, PG&E has also administered the California Alternate Rates for Energy (CARE) program since 1989. The CARE program provides a monthly discount on energy bills for qualifying residential single-family households, tenants of sub-metered residential facilities, nonprofit group living facilities, agricultural employee housing facilities and migrant farm worker housing centers throughout PG&E's service area.

By year-end 2017, nearly \$8.8 billion in cumulative subsidies have been provided to PG&E's CARE customers. PG&E estimates that nearly 1.6 million of its customers with PG&E's territory are eligible for the CARE discount. As of 2017, over 1.4 million PG&E customers are enrolled in PG&E's CARE program. This signifies nearly 89% of the PG&E's qualified customers have been successfully outreached and enrolled in the CARE program.

Table 2 below provides a summary of Program Year (PY) 2017 CARE Program expenditures and activities.

Summary Table 2 - CARE Program

2017 CARE Program Summary			
2017	Authorized Budget	Actual	%
Administrative Expenses	\$18,060,001	\$13,168,911	73%
Subsidies and Benefits	\$580,353,000	\$643,538,184	111%
Total Program Costs and Discounts	\$598,413,001	\$656,707,096	110%
2017 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc.	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	16,314	93,628	140,061
2017 CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
Total Enrolled	1,588,016	1,406,396	89%

1. Energy Savings Assistance (ESA) Program

ESA Program 2017 Overview

Pacific Gas and Electric Company (PG&E)'s Energy Savings Assistance (ESA) Program has offered free energy efficiency programs to income-qualified customers in its 48 counties since 1983, serving 2,052,510 households. In 2017, PG&E's ESA Program provided 87,052 homes with energy efficiency improvements and services, including energy education, energy efficient appliances, and home weatherization. Cumulatively, ESA participants saved over 69 mWh and 1.6 million therms.

The ESA Program's objective is to assist income-qualified customers in reducing their energy consumption and costs while increasing their comfort, health and safety. The ESA Program, formerly known statewide as the Low Income Energy Efficiency (LIEE) program and marketed as Energy Partners prior to 2011,¹ utilizes a prescriptive, direct install approach to provide free home weatherization, energy efficient appliances and energy education to income-qualified customers throughout PG&E's service area.

The ESA Program is available to income-qualified PG&E customers living in single family, multifamily, and mobile homes, including homeowners and renters. To qualify for the ESA Program, the total customer household income must be equal to or less than 200 percent of the Federal Poverty Guidelines, with income adjustments for family size. Income guidelines are updated annually by the California Public Utility Commission (CPUC or Commission)'s Energy Division, becoming effective in June each year,

ESA Program Regulatory Background and 2017 Activity

PG&E filed an ESA Program Application in November 2014 in which it proposed new ESA budgets, targets, strategies, studies and pilots for 2015-2017. Authorization of this application was delayed, and bridge funding extended the ESA and CARE programs in 2015 and 2016 as additional years in the 2012-2014 program cycle.

The 2017-2020 ESA Program was authorized by Commission Decision 16-11-022 (D.16-11-022 or Decision), issued on November 21, 2016. The program cycle was extended from 2017 to December 31, 2020 and included significant program changes. The total 2017 ESA Program budget authorized in D.16-11-022--including employee benefit costs approved in General Rate Case D.14-08-032--was \$152,928,421.

The Decision removed restrictions on re-treating customer homes that had been treated since 2002, while preserving the California Energy Efficiency Strategic Plan mandate that all eligible and willing customers be offered the opportunity to participate in ESA by 2020. The Decision also removed the three measure minimum requirement for participation in ESA and caps on the number of measures offered. The Decision established an ESA common area measure initiative for qualifying deed-restricted multifamily buildings, and leveraging and data sharing goals with the California Department of Community Services and Development (CSD)'s low income programs. The Decision established an ESA

¹ D.08-11-031 and D.09-10-012 mandated that PG&E and the other investor-owned utilities develop a new statewide name and brand identity for the LIEE program. The investor-owned utilities (IOU) worked with Energy Division (ED) to develop a new statewide name during 2010, the Energy Savings Assistance Program. This name was implemented in 2011.

energy savings target, and set new homes treated targets for the 2017-2020 program cycle. PG&E's homes treated target for 2017 was 90,030 homes.

On March 24, 2017, the Joint Investor-Owned Utilities (IOUs)² filed a Joint Petition for Modification (PFM) of D.16- 11-022. The following requests for clarification were included in the PFM:

- Develop mobile versioning to allow CARE and ESA customers to enroll from mobile devices;
- Provide CARE funding for Lifeline Smart Phones;
- Develop and file Marketing and Outreach Plans;
- File water leveraging plans;
- File Programmable Communicating Thermostat (PCT) Pilot plans; and
- Conduct a statewide Request for Proposal (RFP) to procure a remote disaggregation/non-obtrusive load monitoring vendor to generate end-use profiles for CARE and ESA customers.

The Decision directed PG&E to file a Tier 2 "Conforming Advice Letter" to conform final program energy savings goals and budgets to the directives in the Decision, including program costs for approved measures, penetration goals, cost- effectiveness values and any other updated factors. PG&E filed Advice 3830-G/5043-E on April 3, 2017. New program costs included: new approved measures that were not in PG&E's application, new penetration goals, and costs for other new directives. PG&E used unspent funds to cover all new ESA activities as directed by the Decision. PG&E filed a supplemental advice letter (Advice 3830-G-A/5043-E-A) on June 20, 2017 to address additional items requested by Energy Division.

PG&E's ESA budgets were approved in Commission Resolution G-3531, issued on December 21, 2017. PG&E's total authorized ESA budget for 2017 was \$185,083,407, including unspent funds and employee benefits costs approved in PG&E's General Rate Case (D.17-05-013). Decision 17-12-009 resolving petitions for modification of D.16-11-022 was issued on December 20, 2017.

Several directives in the Decision did not begin in 2017 while the IOUs awaited clarification and resolution of PFM issues. In addition, other activities--including initiation of multifamily common area initiatives, PCT pilots and remote disaggregation/non-obtrusive load monitoring--were not begun in 2017 while PG&E awaited resolution and approval of budgets and program plans proposed in its Conforming Advice Letter. These ESA activities will begin in 2018.

PG&E worked with Energy Division and the Mid-Cycle Working Group to update reporting requirements and tables consistent with D.16-11-022 and 17-12-009 requirements. This 2017 Annual Report uses the new reporting templates approved by Energy Division.

1.1. Alignment of ESA Program with Strategic Plan Goals and Strategy

The long-term California Energy Efficiency Strategic Plan (CEESP)³ vision for the ESA Program is to have 100 percent of all eligible and willing low-income customers receive

² The Joint IOUs are: PG&E, Southern California Gas Company, San Diego Gas & Electric Company, and Southern California Edison Company.

all cost-effective ESA Program measures by 2020. The CEESP lays out two goals in achieving the ESA Program vision: (1) by 2020, all eligible customers will be given the opportunity to participate in the ESA Program; and (2) the ESA Program will be an energy resource by delivering increasingly cost-effective and longer-term savings.

1.1.1. Please identify the IOU strategies employed in meeting

Goal 1: Improve Customer Outreach

PG&E provides the following updates to the Implementation Plan and Timeline from the CEESP. The low income strategies and term (2017-2020) were established in the CEESP.

Implementation Plan and Timeline		
Strategies	Term 2017-2020	IOU Strategy Employed This Program Year
1: Strengthen ESA Program outreach using segmentation analysis and social marketing tools.	Continue to assess and evaluate customer-behavior and energy savings; improve upon outreach to eligible communities.	In 2017, PG&E continued and optimized multi-touch customer marketing and outreach, which included: direct mail, email, bill inserts, digital (including social media) campaigns, PG&E's digital newsletter and other integrated marketing touchpoints. These are discussed in Section 1.3. The outreach was targeted to CARE-enrolled customers living in ESA-eligible homes with a high propensity for participation based on data modeling.
1.2: Develop a recognizable and trustworthy Brand/Tagline for the ESA Program.	Evaluate progress/refine strategy.	PG&E continued to use the Energy Savings Assistance Program statewide name and brand identity developed in 2010 (see footnote 1). PG&E continued to refine its Marketing strategy to offer excellent customer services throughout 2017. Marketing and outreach strategies are discussed in Section 1.3.
1.3: Improve program delivery	Ongoing: Use information from segmentation analysis to achieve efficiencies in program delivery. Ongoing: Leverage with local,	The ESA Program outreach team leveraged various community organizations' programs and knowledge of their communities to promote and enroll customers in the ESA Program throughout 2017.

³ California Energy Efficiency Strategic Plan. California Public Utilities Commission. July 2008, updated January 2011.

Implementation Plan and Timeline		
Strategies	Term 2017-2020	IOU Strategy Employed This Program Year
	state, and federal agencies as well as other organizations to increase seamless coordination, efficiency and enrollment.	Leveraging and integration efforts are described in Sections 1.6. and 1.7.
1.4: Promote the growth of a trained ESA Program workforce.	Implement ESA Program workforce education and training. Coordinate ESA Program workforce and service providers with broader market.	PG&E continued to implement education and training for the Energy Specialists, Weatherization Specialists, Duct Test and Seal technicians and NGAT technicians in the ESA program, and trained 223 ESA contractors in 2017. These efforts are discussed in Section 1.8.

**1.1.2. Please identify the IOU strategies employed in meeting
Goal 2: ESA Program Is an Energy Resource**

PG&E provides the following updates to the Implementation Plan and Timeline from the CEESP. The low income strategies and term (2017-2020) were established in the Plan.

Implementation Plan and Timeline		
Strategies	Term 2016-2020	IOU Strategy Employed This Program Year
2.1: Increase collaboration and leveraging of other low income programs and services	Continue to expand partnerships with stakeholders and seek new opportunities for data sharing.	As part of Residential Rate Reform education campaign efforts, the ESA and CARE Programs partnered with other community based organizations and other PG&E programs in strategic community events across PG&E's service area. See Sections 1.6 and 1.7 for other examples of ESA leveraging and partnerships.
2.2: Coordinate and communicate between ESA Program, energy efficiency and Demand-Side Management (DSM) programs to achieve service offerings that are seamless for the customer.	Continually reevaluate and update programs to take advantage of new technologies.	In 2017, LEDs and Tier 2 power strips were added to the program. ESA continued to collaborate with its EE program and products groups to consider new technologies that may be ripe for inclusion in the ESA Program. If appropriate, these products will be included in the mid-cycle process authorized in D.16-11-022 and D.17-12-009.

Implementation Plan and Timeline		
Strategies	Term 2016-2020	IOU Strategy Employed This Program Year
		<p>Marketing and outreach for the low income programs—including the ESA Program, CARE and the low income CSI Program—continued to be implemented by PG&E's Community Engagement and Solutions Marketing teams in 2017, allowing better integration of messaging and customer education. See Section 1.3.</p> <p>PG&E's ESA team continued to participate in working groups to propose AB793-compliant energy management technology for the Program.</p>
2.3: Provide low income customers with measures that result in the most savings in the ESA Program.	Continue to assess and evaluate opportunities to incorporate new energy efficiency measures into the ESA Program, e.g., plug-load reduction, new HVAC technology.	<p>D.16-11-022 authorized new ESA program measures and pilots proposed in PG&E's 2015-2017 ESA Application in November 2016, and PG&E transitioned to implement new measures and processes during 2017.</p> <p>PG&E's ESA team continued to meet with the other IOU ESA teams in 2017 to discuss potential new measures for inclusion in the ESA Program, and PG&E began meeting with the Mid-Cycle and Cost Effectiveness Working Groups in 2017. PG&E is also anticipating preliminary new impacts from the 2017 Impact Evaluation in Q2 2018. Recommendations from these Working Groups as well as new impacts will be used as appropriate in PG&E's Mid-Cycle update Advice Letter filing in July 2018. See Sections 1.13 and 1.10.</p>
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	Continue to evaluate approach to determine whether additional segments are needed.	<p>In 2017, PG&E continued to provide targeted referral lists to ESA subcontractors to help them locate and target high-poverty areas. Additionally, PG&E managed automated outbound voice, text messaging and direct mail campaigns in areas where customers were likely to qualify for the program.</p> <p>PG&E continued to use its ESA propensity model. This model was</p>

Implementation Plan and Timeline		
Strategies	Term 2016-2020	IOU Strategy Employed This Program Year
		<p>optimized in 2016 with a wider array of data variables for both the customer and the home. The model focuses marketing investment among customers with the highest propensity to participate, enhancing media targeting and lowering marketing costs.</p> <p>See Section 1.3.</p>

1.2. Energy Savings Assistance Program Overview

1.2.1. Provide a summary of the Energy Savings Assistance Program elements as approved in D.12-08-044.

D.16-11-022 authorized ESA budgets and targets for PY2017. The updated ESA budgets proposed in PG&E's Conforming Advice Letter filings⁴ were not authorized until December 21, 2017, and were thus not in effect during 2017. Not having all ESA funding authorized until the December 2017 contributed to PG&E's underspending in 2017, as this budget was not available until the end of the year. In addition, PG&E was unable to begin work on various ESA program initiatives (such as the multifamily common area initiative) in 2017 while awaiting resolution of its Petition to Modify D.16-11-022 and Conforming Advice Letter. Finally, PG&E prioritized and phased in the new ESA directives over the course of 2017 while also preparing to transition to a new program database. PG&E will prepare an Advice Letter to carry-over into 2018 authorized funding that was not spent in 2017, and will also discuss any adjustments, recommendations or process improvements in its Mid-Cycle Update Advice Letter in 2018.

The budget shown below was authorized in the Decision and includes adjustments and unspent funding authorized in Commission Resolution G-3531.

The PY2017 ESA Program Summary Table below compares PY2017 results to PY2017 budgets and targets authorized in D.16-11-022, as updated in Resolution G-3531.

Table 1.2: 2017 ESA Program Summary

PY 2017 ESA Program Summary			
	Authorized/ Planning Assumptions	Actual	%
Budget [1]	\$154,671,971	\$122,778,059	79%
Budget from Unspent Funds [2]	\$30,416,596	\$2,377,763	8%
Homes Treated	90,030	87,052	97%
kWh Saved	NA	59,263,365	NA
kW Demand Reduced	NA	69,550	NA
Therms Saved	NA	1,651,228	NA

⁴ PG&E Advice 3830-G/5043-E (April 3, 2017) and Advice 3830-G-A/5043-E-A (June 20, 2017).

[1] 2017 ESA Program budget from D.16-11-022 and updated by Commission Resolution G-3531 (December 21, 2017). Includes employee benefit costs approved in D.17-05-013, and a \$5,159 carry-forward adjustment, as described in ESA Table 1 footnotes 1-3, and ESA Table 12. This amount does not include unspent funds authorized in Resolution G-3531.

[2] Unspent funds authorized in Resolution G-3531. These are shown in ESA Table 1A.

1.3. Marketing, Education and Outreach

1.3.1. Provide a summary of the geographic segmentation strategy employed, (i.e., tools and analysis used to segment “neighborhoods,” how neighborhoods are segmented and how this information is communicated to the contractor/CBO).

PG&E and the other California IOUs used the joint utility methodology adopted by the CPUC in D.01-03-028 for developing eligibility estimates by geographic area in 2017. This method entails an annual estimation of eligibility for CARE, ESA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole. The joint utility methodology is further described in CARE Section 2.1.2.

Using the 2017 geographic area list of ESA-eligible customers, PG&E broke out ZIP-7 areas eligible for “self-certification” enrollment (by having over 80 percent of households living at or below 200 percent of the Federal Poverty Guideline Level). These ZIP-7 geographic area lists were provided to ESA Program contractors, so they could be specifically targeted for enrollment. Most implementation contractors then scheduled their appointments geographically to minimize costs and typically worked through their assigned areas geographically for the same reason.

PG&E Marketing aligned county-level penetration data next to CARE penetration rates and counties with rural and high-poverty areas. The analysis revealed good penetration rates among most rural and high-poverty areas and highlighted areas of opportunity to increase penetration among eligible households. In 2017, PG&E Marketing ran a successful digital campaign targeted to four counties identified through this analysis (Alameda, Contra Costa, San Joaquin and Stanislaus Counties).

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

ESA Program outreach employs multiple strategies to reach income qualified customers with high energy use and energy burden, including integration with CARE high usage communications.

PG&E’s ESA Program propensity model considers multiple customer data points, including energy usage, bill amount, payment patterns and CARE data model scores to ensure that PG&E is reaching customers who could most benefit from the ESA Program.

Additionally, PG&E identified CARE-enrolled customers within six priority categories, including:

- New CARE customers
- CARE customers with high energy usage >400% for electric service
- CARE customers with high energy usage >200% for gas service

- CARE customers who recently moved
- CARE customers who have provided income documentation for the program's post-enrollment verification process
- CARE customers on the program 6+ years

The ESA database was enhanced to capture data on these six priority categories and customers that fell into one or more category were flagged. ESA program sub-contractors were instructed to focus their outreach efforts on the customers within these priority categories. PG&E also prioritized direct marketing outreach to high-propensity customers in these categories.

2017 ESA Marketing and Outreach Highlights

PG&E continued to use methods that have accomplished current high awareness and acquisition levels and evolved specific elements of our messaging and outreach to speak more specifically to the remaining eligible customers and the nuanced barriers they are experiencing.

Marketing strategy leveraged the power of repetition in the right channels, reaching customers through the channels they prefer and engaging them with relevant messages. PG&E leverages customer insights and a test, learn and optimize approach to continually improve marketing effectiveness.

PG&E focused outreach efforts on CARE-enrolled customers living in homes not yet treated by the ESA Program. The multi-touch, multi-channel approach included direct marketing, digital campaigns, bill inserts, and PG&E-owned assets such as our residential newsletter and website.

PG&E continued coordinated marketing and generated 85,777 leads for Richard Heath and Associates (RHA), the ESA program administrator, throughout 2017.

Direct outreach

PG&E deployed two direct marketing campaigns to CARE-enrolled, ESA-eligible customers in 2017. Direct campaign response in 2017 was nearly triple (18% response rate) the 2016 average (6.7% response rate Q1-3) due to testing and optimization to streamline both the offer and the response form.

Offers continued to be bi-lingual English/Spanish, with personalized pre-filled response forms. PG&E utilized a new optimized email template to increase click-through and response rates.

Direct mail sample creative:

Give your family year-round comfort and lower bills with no-cost home upgrades

Together, Building a Better California

ENERGY SAVINGS ASSISTANCE PROGRAM APPLICATION

ABOUT YOU AND YOUR HOUSEHOLD

PROGRAM INCOME GUIDELINES

ENERGY STATEMENT INSERTS

Enjoy year-round comfort with free home upgrades from PG&E

Most CARE participants qualify. So don't delay, apply today.

Start your application now

ENERGY SAVINGS ASSISTANCE PROGRAM

Apply in minutes

Together, Building a Better California

Sample email creative:



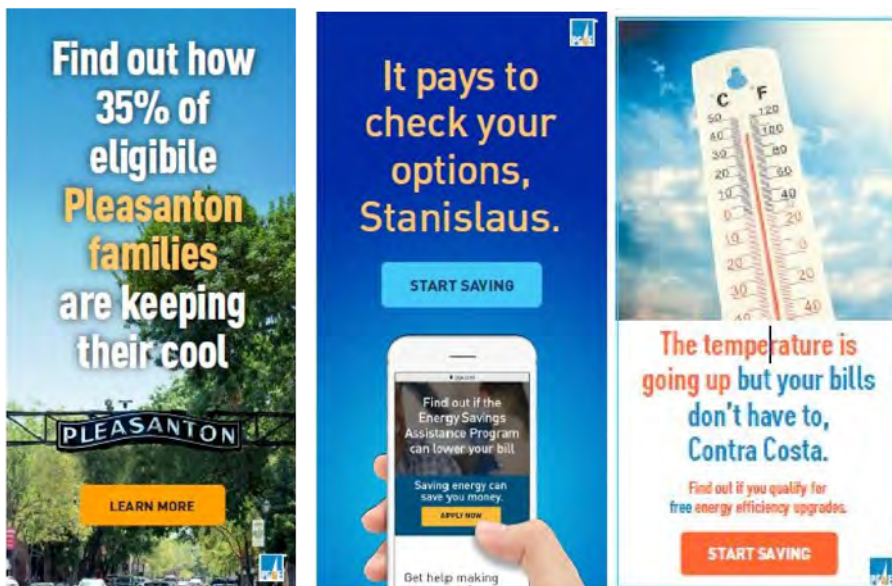
Energy Statement Inserts

PG&E deployed energy statement inserts to CARE-enrolled customers twice in 2017 both to maintain high awareness of the ESA Program among eligible customers and to generate leads for subcontractor follow-up. The piece is bi-lingual with English on one side and Spanish on the other.

Sample artwork:

PG&E deployed a new digital media campaign in 2017, focusing specifically on four counties with lower ESA penetration among eligible households. [The four counties are: Alameda, Contra Costa, San Joaquin and Stanislaus.](#) The strategy included advertisement in digital display, social media and search, testing hyperlocal and social norming messages.

Sample creative:



Community events

PG&E hosted outreach booths during the month of January at Chinese Lunar New Year events and local grocery stores that serve the Chinese community. The events focused on promotion of PG&E's low income programs and offered in-person application assistance. Radio promotions were used to drive awareness of, and traffic, to the event.

PG&E media and owned assets

PG&E continued the monthly digital newsletter targeting customers with a high propensity for eligibility in CARE and the ESA program with the purpose of building awareness for both programs and providing relevant energy management tips and tools.

Low income customers receiving a Home Energy Report were also provided an offer to participate in the ESA program. ESA was also periodically featured on the pge.com homepage in an effort to increase the visibility of the program.

PG&E continued to participate in media interviews throughout the territory to promote the ESA Program with a focus on Spanish and Chinese in-language media including: KSFO, KMYX, Fil AM Radio, KCSO Telemundo, KMJE FM, KXVS Voice of Stockton Radio, KFTV Univision, and Radio Bilingue.

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

Identification: In 2017, PG&E prioritized marketing and outreach to CARE-enrolled customers with certain attributes such as being new to the program, a high energy user, or completing the post-enrollment verification process. Customers are highly engaged with the company during these shifts in status and may be more likely to take advantage of ESA program benefits. PG&E plans to optimize this audience targeting in 2018, building upon the foundational work completed in 2017.

Outreach: PG&E streamlined direct mail and email to clearly articulate the benefits of the program for customers who are short on time and with competing demands for their attention.

The ESA digital campaign featuring new hyperlocal and social norming messages enhanced the program positioning and captured customer attention. PG&E plans to continue testing in additional geographies and find opportunities to test a similar strategy in other channels.

Bulk Purchasing

PG&E launched a bulk purchasing program in 2017 to ensure all customers participating in the ESA program are receiving consistent quality products at optimal and controlled pricing. Bulk purchasing also provides increased transparency of materials cost and increased inspection efficiency. In this model, ESA Contractors purchase materials from an identified supplier to be installed in the ESA Customer's home. The products that were identified to be part of the bulk purchasing program included LEDs, microwaves, power strips, attic insulation, wall/window ACs, aerators, showerheads, and smoke alarms. Not all materials used in the Program are supplied through the bulk program, for example, caulking, doors, and glass are not part of the bulk program as those materials have too much variety to efficiently provide in bulk. The program was launched in three phases

between January 2, 2017 (with the launch of LEDs) and May 1, 2017. Complete phase-out of non-supplied products was complete September 1, 2017.

Minor Fail Initiative

In order to improve customer satisfaction, the PG&E ESA Team launched an initiative in the North Valley Region (per CIP territory boundaries) aimed at reducing return visits to the customer's home. The initiative will determine the success of CIP correcting a certain amount of minor fails in order to prevent a return trip to the customer by the ESA Contractor. In order for CIP to correct minor fails, the CIP Inspector must verify there are no other fails present at the customer's home before implementing this minor fail procedure. The initiative was launched in late 2017. An evaluation of data will be done at the end of Q2 2018.

This initiative procedure was only applicable to the following measures:

- Cover plates
- Gaskets
- LED A-lamps

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

During 2017, PG&E prepared to offer several new Energy Management Technology-related measures and initiatives in ESA. However, none of these were implemented in 2017, and no costs were incurred in 2017.

In 2017, PG&E collaborated with the other IOUs to develop new Energy Education training materials. The new Enhanced Energy Education will launch in Q1 of 2018.

PG&E worked with the other IOUs in 2017 to further develop the Programmable Communicating Thermostat Pilot (PCT Pilot) directed in D.16-11-022. PG&E's re-named Smart Thermostat TOU Pilot is expected to launch in 2018.

PG&E began to collaborate with the other IOUs during 2017 to develop a request for proposal for a load disaggregation vendor to offer end-use and electric usage profiles. A vendor will be selected in 2018. PG&E is actively consulting with other demand response and energy efficiency programs to determine how they can benefit from this offering, once launched.

1.4. ESA Program Customer Enrollment

1.4.1. Distinguish between customers treated as "retreated or go backs" and "first touch" customers so that the Commission has a clear idea of how many new customers the IOUs are adding to the ESA Program.

Go-Back customers are customers that have been retreated by ESA since 2002. Although these previously-treated customers are eligible to be treated again, D.08-11-031 stressed that the IOUs should first seek out new households that have not yet been

treated, and report previously treated customers in ESA Annual Reports. In 2017, PG&E treated 35,610 “Go-Back” customers.

In D.16-11-022, the Commission removed restrictions against going back to re-treat customers treated after 2002. These Go-Back customers that had been ineligible to participate again in the ESA Program, became eligible again in 2017, and PG&E began implementing Go-Back retreatments in May 2017. Forty-one percent of the homes treated in 2017 were Go-Back customers, and 59 percent were First Touch customers.

PG&E remains on target to meet the 2020 Strategic Initiative goal of offering ESA to all willing and eligible customers by 2020.

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

In 2017, PG&E’s ESA Program contractors continued to streamline customer enrollment strategies by incorporating categorical eligibility and self-certification into ESA Program processes, where applicable. Contractors worked with property agents to get signed Property Owner Waivers for entire multifamily complexes in order to perform work on all of the units at the same time.

PG&E customers may enroll through categorical eligibility by providing documents proving participation in one of the Commission-approved State or Federal public assistance programs. This allows eligible customers to skip showing proof of household income.

PG&E continued to encourage contractors to work in the 80 percent self-certification areas⁵ by providing them with breakdowns of estimated eligible customers by ZIP-7 to use in their customer recruitment activities. PG&E discussed targeting strategies at contractor meetings and helped plan enrollment events with contractors and community organizations.

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

PG&E treated 87,052 customer homes in PY2017, reaching 97 percent of the annual goal authorized in D.16-11-022 and updated in D.17-12-009. PG&E’s ESA target for 2017 was 90,030.

PG&E experienced a slow ramp-up in 2017, as contractors transitioned to implementation of new ESA rules authorized in D.16-11-022, including: removal of three measure minimums, measure caps, and the ban on re-treated homes treated after 2002. In addition to ESA rule changes, PG&E also transitioned to a new bulk purchasing model described in Section 1.3.3.

⁵ Customers living in Zip codes having 80% or more households at or below the ESA-qualifying 200% of Federal Poverty Guideline Level are allowed to self-certify their eligibility, per D.08-11-031, OP6.

PG&E is very close to the end of the Commission's 2020 Strategic Initiative to provide the ESA Program to 100% of eligible and willing low income customers. PG&E is still on target to meet this ambitious 2020 goal despite the slow ramp-up in activity in 2017. Go-Back customers that were ineligible to participate again in the 2016 ESA Program, were eligible to be re-treated in 2017. PG&E homes treated goals include a mix of both new customers that count towards the 2020 goal and previously treated customers. PG&E will make up the 3% 2017 homes treated shortfall over the course of three remaining years of this 2017-2020 cycle.

1.5. Disability Enrollment Efforts

1.5.1. Provide a summary of efforts to which the IOU is meeting the 15 percent penetration goal.

Disabled customers made up 25 percent of the ESA Program enrollees in 2017, exceeding the 15 percent penetration goal.⁶ Because contractors may not ask about disabled inhabitants, households with disabled occupants are counted and recorded by ESA contractors based on visual observations, or unsolicited comments by inhabitants. Thus, participation of households with a disabled inhabitant is likely to be higher than recorded.

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

PG&E's ESA Program regularly takes the needs of persons with disabilities into account. PG&E provides specialty measure enhancements to ESA customers with disabilities. For example, side-by-side and bottom mount refrigerators are available to customers with disabilities, and in 2017 ESA installed 701 of these special-order refrigerators. PG&E produces ESA program materials to help customers with impaired vision. A large-print ESA fact sheet is available on PG&E's website, and printed copies are provided to the ESA contractors. In 2017, PG&E's ESA program also introduced a Braille version of the ESA fact sheet which is made available to the ESA contractors as well as the community outreach partners.

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

Table 1.5.3: 2017 Disability Enrollments

2017 Disability Enrollments			
Source	Total Enrollments	Disability Enrollments	% of Disability Enrollment
Various contractor recruiting and sign-ups			
Total Enrollment Rate	87,052	21,987	25%

PG&E's community and outreach strategy includes collaboration with strategic community partners to provide energy education as well as facilitate enrollment in various

⁶ PG&E does not have disability data to determine the eligible disabled population, and so uses enrollment data as a proxy to calculate a "penetration" rate.

PG&E programs. Community Outreach Contractors help drive participation in low income programs. Traditional marketing channels such as print materials as well as one-on-one direct interaction at local community outreach events and lobby assistance days are effective at targeting the disabled community.

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

As stated above, PG&E's 2017 ESA Program disabled community participation was 25 percent – above the Commission's 15 percent goal.

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

D.08-11-031 defined leveraging as “an IOU’s effort to coordinate its ESA Program with programs outside the IOU serving low income customers. These include programs offered by the public, private, non-profit or for-profit, local, state, and federal government sectors that result in energy efficiency measure installations in low income households.” Progress will be measured by tracking the following criteria:

- **Dollars saved.** *Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/ donated resources, elimination of redundant processes, shared/contributed marketing materials, discounts or reductions in the cost of installation, replacement and repair of measures, among others are just some examples of cost savings to the IOU).*
- **Energy savings/benefits.** *Leveraging efforts are measurable and quantifiable in terms of home energy benefits/savings to the eligible households.*
- **Enrollment increases.** *Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.*

In 2017, PG&E continued to leverage resources to support low income customers. In most cases, PG&E was unable to collect and track data to calculate all of these leveraging criteria. PG&E had the most data to report regarding enrollments resulting through referrals into other programs, including LIHEAP, REACH, Modesto Irrigation District (MID), Turlock Irrigation District (TID), Medical Baseline, and California American Water Company programs. PG&E estimated savings from its refrigerator leveraging contracts with LIHEAP providers (see Section 1.6.3) and its water partnership initiative (see Section 1.6.4). Results of 2017 leveraging activities are shown in ESA Table 14.

1.6.1. Describe the efforts taken to reach out and coordinate the ESA Program with other related low income programs offered outside the IOU that serve low income customers.

PG&E continues to proactively seek out and take advantage of leveraging opportunities for ESA with other programs offered in California. Following are three examples of PG&E leveraging activities in 2017.

SASH Leveraging. (See Section 1.7.6 and 1.7.7)

Redding Electric Utility. In 2017, the PG&E ESA Program coordinated with Redding Electric Utility to launch a joint weatherization program for income-qualified customers. The collaborative program offers natural gas and electricity saving measures to customers served by both PG&E and REU. Income-qualified natural gas customers that participate in the PG&E ESA Program are automatically enrolled in REU's program and receive all feasible electric measures in addition to those offered by PG&E. The joint program leverages training, processes, and customer touches to minimize program implementer costs and resources, while providing maximum benefit to customers.

Tribal. In 2017 PG&E identified that since program inception and through November of 2017, 52.9% of the estimated number of ESA-eligible customers living on tribal lands in PG&E's service area have been treated. This penetration is based on census data provided by Athens Research. D.17-12-009 specifically required the utilities to update their goals based on information gleaned from rectifying potential discrepancies between addresses used by ESA and the addressing system of a given tribe. This rectification was unnecessary because PG&E used GPS located meter records correlated with official tribal boundaries to determine the total number of meters in each of the tribal lands served by PG&E. These treated meters were then correlated with census data as per the official penetration rate methodology.

In 2017 PG&E contracted with Redbridge consulting to develop an approach to tribal outreach. Based on Redbridge's recommendations PG&E has begun a prioritization of tribal outreach focusing on the areas identified with the highest poverty (per census data), the lowest penetration rate and with existing connections to PG&E or one of PG&E's partners. Consultations will occur with all tribes, in parallel to specific targeted efforts. Of special interest is working directly with CSD to explore the possibility of leveraging their tribal connections to more quickly engage ESA with tribes through a trusted intermediary.

1.6.2. In addition to tracking and reporting whether each leveraging effort meets the above criteria in order to measure the level of success, please describe the Other Benefits resulting from this particular partnership not captured under the 3 criteria described above.

See ESA Program Table 14 – Leveraging & Integration.

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

PG&E continued to implement its refrigerator leveraging program with LIHEAP providers. Through this leveraging program, LIHEAP agencies in PG&E's service area that are not ESA contractors can receive ESA Program funding to purchase refrigerators for qualified PG&E electric customers, thus freeing up more LIHEAP funding to provide other services to low income households. PG&E counts these refrigerators and their savings, but not the CSD "treated" home. In 2017, 26 ESA refrigerators (\$21,000 in funding) were funded through LIHEAP leveraging contracts, resulting in savings of 20,000 kWh and 4 kW.

Additionally, ESA Program implementation contractors referred 354 customers to LIHEAP in 2017⁷ and an additional 2,377 to other low-income programs.⁸

⁷ Self-reported from implementation contractors

⁸ Other programs include Investor Owned Utility ESA Programs

D.16-11-022 directed four leveraging and data sharing activities to be incorporated in ESA budgets or described through a Conforming Advice Letter:

1. Prepare CSD/ California Energy Commission (CEC)/ California Department of Water Resources (DWR) Drought coordinated budget. IOUs are to track and report households treated under Drought funding separately. These treated households will count toward IOU homes treated goals (OP32).
2. Prepare CSD-Low Income Weatherization Program (LIWP) coordinated budget for treating multifamily whole buildings using similar tracking and reporting as directed for Drought funding (page 202).
3. Describe CSD-Weatherization Assistance Program (WAP) coordinated referral process for customers with high energy burden and non-IOU fuels (page 368).
4. Describe CSD access to customer-specific usage data for CSD-treated households (page 369).

In Q4 2016 the IOUs and CSD began working to implement D.16-11-022 leveraging requirements: to share IOU data usage information for CSD clients, and to fund ESA measures currently offered by ESA for multifamily customer households participating in CSD's LIWP for multifamily buildings. PG&E, SCE, SDG&E and SoCalGas met with CSD staff throughout 2017 to discuss data sharing, CSD's multifamily property LIWP leveraging, and other opportunities, in compliance with D.16-11-022 directives.

Drought Mitigation Coordination. PG&E had several discussions with CSD regarding coordinating their anticipated drought mitigation and toilet work in early 2017. CSD clarified that D.16-11-022 mischaracterized the amount of drought mitigation funding they received; CSD did not receive CEC drought funds. The Decision discussed a CEC plan for a \$15 million infusion to bolster offerings of CSD's weatherization assistance programs to include water saving devices and measures. Unfortunately, the Budget Act of 2016 did not appropriate such funding to the CEC, thus the funding for CSD from the CEC never materialized.

The drought mitigation funding CSD received from DWR was nearly expended by the time PG&E filed its Conforming Advice Letter on April 3, 2017. CSD Chief Deputy Director Jason Wimbley clarified the status of CSD's DWR-funded Low- Income Toilet Replacement Program (TRP), explaining that this program has been in operation for many months and was scheduled to conclude on June 30, 2017. Given the rate of current expenditure and anticipated ramp down of local operations over ensuing months, CSD believed the window of opportunity to accomplish any meaningful leverage of TRP funds and/or services was closed by the time of PG&E's Conforming Advice Letter filing, and CSD did not request ESA leveraging funds for Drought Mitigation projects.

OP. 32 clearly indicated that funding for Drought Mitigation efforts was coincident with CSD, CEC, and DWR efforts and would end when these efforts concluded:

...This shall be a one-time effort with a sunset date that will coincide with the conclusion of the CSD, CEC and DWR efforts. Any unspent ratepayer funds remaining at the conclusion of the Utility Drought Mitigation Program will be returned to the ESA Program balancing account, in concurrence with the sunset date outlined in the guidelines for the CSD, CEC, and DWR.⁹

⁹ D.16-11-022, OP.32.

For these reasons, and in agreement with CSD, PG&E did not allocate Drought Mitigation funding to CSD.

LIWP Multifamily Whole Building Coordination. D.16-11-022 required PG&E to fund ESA measures currently offered by ESA for multifamily customer households participating in CSD's Low Income Weatherization Program (LIWP) for multifamily buildings. PG&E worked with CSD to project and calculate a funding level for coordinating with CSD's LIWP multifamily whole building efforts. CSD estimated the number of multifamily buildings to be treated in PG&E's service area, and PG&E determined a budget based on projecting the number of ESA measures anticipated to be installed through this coordinated effort, including costs for both labor and measures. As directed by the Decision, PG&E's LIWP coordination budget will be used to fund only measures currently offered by the ESA Program and approved for multifamily households, thereby preserving the remaining CSD funds for use to install central systems and common area measures not provided by the ESA Program. PG&E's budget for this effort was included in its Conforming Advice Letter submitted on April 3, 2017,¹⁰ and supplemented on June 20, 2017,¹¹ and was authorized by Commission Resolution G-3531 issued December 21, 2017. Since working with CSD to develop a budget for LIWP leveraging efforts, PG&E ESA Program Management, Legal, and Sourcing staff have been actively working with CSD teams to complete contract / agreement terms necessary to begin leveraging funds. PG&E expects to begin implementation in 2018.

WAP Referral Process. PG&E continued collaborating with CSD throughout 2017 to develop coordination plans between the ESA Program and CSD's WAP to facilitate a referral process for customers identified with high energy burden and non-IOU fuel sources. PG&E, CSD and the other IOUs continue to meet and are working together to establish and align reporting requirements that will better enable referrals between CSD and PG&E programs. PG&E entered into non-disclosure agreements with CSD to facilitate individual data sharing agreements. PG&E and CSD are currently working to designate priority areas, to begin developing specific coordination plans targeting customers in those areas.

Customer Usage Data Sharing. PG&E met with CSD throughout 2017 to implement a data exchange process to provide customer-specific usage data and information for CSD-treated households. D.16-11-022 specified the IOUs' Green Button/Connect My Data program as a means through which to coordinate data exchange, however, following discussion with CSD about their data analysis needs and how Green Button works, it appeared that this data program would not facilitate sharing data for multiple customers through a single data pull, but rather provides data for one customer at a time.

PG&E worked with CSD in 2017 to provide the required data through the most expedient means. On February 2, 2018, per D.17-12-009, Attachment 1, OP.183, PG&E and CSD entered into a non-disclosure agreement (NDA) for data sharing purposes.

PG&E and CSD continue to actively explore opportunities for increased leveraging, and PG&E is working closely with CSD to pursue new approaches and partnerships during this 2017-2020 cycle, including collaborating on PG&E's Consumption-Driven Weatherization project and leveraging tribal outreach efforts.

¹⁰ PG&E Advice 3830-G/5043-E (April 3, 2017).

¹¹ PG&E Advice 3830-G-A/5043-E-A (June 20, 2017).

Leveraging with Other IOUs

PG&E continued to work with the other IOUs in 2017 to share successful leveraging models and duplicate leveraging effort successes per D.12-08-044, OP.21. ESA program managers held regular conference calls throughout 2017 to discuss program implementation and strategies. In addition, ESA program staff from the utilities met in person several times to develop ESA multifamily plans, share outreach strategies and lessons learned, and discuss potential collaboration opportunities.

PG&E continues to actively explore new opportunities and coordinate program delivery to promote long-term enduring energy savings and cost efficiency.

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

In response to the Governor's Drought Emergency, PG&E began exploring leveraging opportunities to partner with water agencies in 2015. These activities continued throughout 2016 and 2017.

2017 Water Partnership Initiative

In 2015, PG&E began research on ways to work collaboratively with water agencies and other water industry stakeholders. The goal of this research initiative was to collect information to inform future program design for the integration of expanded water conservation program offerings. Since no new measures or unauthorized measures were included, this research initiative was funded through the ESA General Administration budget.

In the first phase of the leveraging research initiative, 250 water agencies within PG&E's service area were identified, and a comprehensive matrix of water conservation program offerings was developed. Informed by the research results, PG&E conducted outreach with twelve water agencies and seven water industry associations to solicit feedback on a framework for building collaborative programs that would leverage existing conservation efforts in both the water and energy areas. PG&E also held a Water Partnership Forum in 2016, to increase shared knowledge of water-energy collaboration experiences and develop overarching strategies for partnership. Feedback from the seven water agencies illuminated the differences between water agency and investor owned energy utilities funding and decision-making structures. The majority of water agencies were not very interested in spending a lot of resources on the residential sector that contributes to minimal water savings but were interested in low cost, collaborative programs.

Based on the information gathered, a test program was designed to complement existing offerings and augment water conservation efforts. The program incorporated options for indoor and outdoor water usage assessments, leak detection, enhanced water conservation education and incremental water conservation measures. This test program design was discussed with four water agencies and further refined to mitigate barriers to water agency participation. Barriers identified included: budget constraints, resource constraints, infrastructure differences, and data sharing issues.

An agreement was executed with California American Water to conduct test programs in multiple metropolitan areas. The test programs launched in Sacramento in late 2015, in Solano County in 2016, and in the Monterey/Salinas area in the fall of 2016. The test programs ran through December 2017.

In total, 1,394 households were served in the pilot. All households received an indoor water use assessment and water conservation education, co-funded by PG&E and the water agencies. Additionally, water agencies supported the costs to install cold water

measures: 181 inefficiency toilets were replaced with low-flow toilets, 44 leaky toilet flappers were replaced, 531 shower timers were installed and 207 hose nozzles were distributed during the test. These measures will result in an estimated savings of 6.5 million gallons of water and 7,583 kWh per year.

Thanks to the success of the test, PG&E will expand the partnership scope in 2018, working with more water agencies to expand the benefits to ESA household and maximize water conservation.

1.7. Integration Success

As defined in D.08-11-031, "Integration constitutes an organization's internal efforts among its various departments and programs to identify, develop, and enact cooperative relationships that increase the effectiveness of customer demand side management programs and resources. Integration should result in more economic efficiency and energy savings than would have occurred in the absence of integration efforts."

PG&E continued distribution of the redesigned customer-assistance-focused "Integrated Services Brochure" in multiple languages in 2017. This brochure offers enrollment information for the following programs, in addition to ESA:

- California Alternate Rates for Energy (CARE)
- Family Electric Rate Assistance (FERA)
- Relief for Energy Assistance through Community Help (REACH)
- Balanced Payment Program
- Payment Arrangements
- Bill Guaranty
- Third Party Notification (past due reminders)
- Pge.com/myaccount
- Cooling Centers
- Medical Baseline
- Rate Choices

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

PG&E continued efforts to integrate ESA messaging into CARE outreach and offer ESA services to high-energy users on CARE in 2017. As discussed in Section 1.3.2, CARE-enrolled customers within six identified priority categories received PG&E direct marketing outreach and were targeted by the contractors in their outreach efforts. ESA contractors and CARE Community Outreach Contractors continued to cross-promote ESA and CARE programs at outreach events.

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

PG&E's ESA program collaborated with the Energy Efficiency Residential Programs extensively throughout 2017. Some successful examples include:

Launched SPOC based on shared vision. PG&E's Single Point of Contact (SPOC) launched in 2017. The SPOC helps to facilitate the multifamily property owners' participation in other qualifying program resources and funding opportunities as applicable, including: PG&E energy efficiency programs such as Multifamily Upgrade

Program (MUP), On-Bill Financing (OBF), On Bill Repayment (OBR), Electric Vehicles, ESA, and Moderate Income Direct Install (MIDI).

The Table below shows referral contacts made in 2017, and includes: applications, pre-applications, customers deemed ineligible, and customers not interested in applying to the referral program.

Table 1.7.2: SPOC Referral Contacts

Program	Customers	Buildings	Dwelling Units
Multifamily Upgrade Program	3	37	345
ESA	1	n/a	n/a
EV Charge Network	1	13	100
CA Multifamily New Construction	1	1	6
On Bill Financing	12	55	1,095

In 2017, PG&E requested unspent funds for SPOC implementation in its Supplemental Conforming Advice Letter (Advice 3830-G-A/5043-E-A). This was authorized in Resolution G-3531 and is included in Table 1A.

Multifamily Common Area Measure (CAM) Initiative. PG&E participated in quarterly Multifamily Working Group meetings as well as additional ad-hoc sessions to understand various multifamily stakeholder perspectives and share PG&E design plans for the directed CAM Initiative. During 2017, PG&E developed its CAM initiative designs. These were filed and approved in March 2018. PG&E will begin CAM implementation in 2018. For complete 2017 Working Group progress, see section 1.13.

My Account. In 2017, My Account was enhanced to provide more comprehensive self-service tools to all PG&E customers including ESA customers who are enrolled in My Account. Some key enhancements include bill journeys providing energy usage details and comparisons, Home Energy Check-ups including bill disaggregation, and personalized tips to help customers reduce their energy usage. My Account also began offering rate comparisons and a Bill Forecast Alert in 2017. By mid-2017, approximately 60,000 CARE customers had completed a Home Energy Check-up.

Residential Newsletter. As part of the Residential Integrated Campaign, the Residential Newsletter is sent out monthly to over 1.8 million residential customers, with approximately 748,000 receiving a version tailored to low income customers. The goal of this effort is to go beyond a transactional one-time interaction with our customers in exchange for a continued dialogue about energy efficiency and management. Emails were sent out monthly to general population and low-income customers.

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

PG&E's Moderate Income Direct Installation (MIDI) program, previously an Energy Efficiency Government Partnership Program, is now managed by PG&E's Energy Efficiency Residential Team. See Section 1.7.4.

1.7.4. Describe the new efforts in program year to integrate and coordinate the ESA Program with any additional EE Programs.

In 2017, ESA staff worked closely with PG&E Energy Efficiency (EE) teams on Assembly Bill (AB) 793 implementation plans to incorporate energy management technologies into utility energy efficiency programs. Tier II Power Strips were launched in the ESA program in January. ESA staff continues to leverage EE strategies and approaches into the ESA program as appropriate.

The ESA Program continued to coordinate with the Moderate Income Direct Installation (MIDI) program throughout the year in 2017. (This program was previously a Government Partnership Program, but is now managed by PG&E's EE Residential Services Team.) The MIDI program was able to treat 434 households in 2017 using contractors who also provided ESA services.

1.7.5. Describe the new efforts in program year to integrate and coordinate the ESA Program with the DR Programs, including successes in Air Conditioning Cycling or other DR Programs.

ESA continued its integration efforts with the SmartAC Program in 2017. The SmartAC Program sought to increase customer participation by integrating ESA as a marketing and outreach channel.

In 2017, PG&E installed 716 SmartAC devices as part as the leveraging effort between the ESA Program and the DR team.

1.7.6. Describe the new efforts in program year to integrate and coordinate the ESA Program with the CSI Programs.

Single Family Affordable Solar Housing (SASH) Program

PG&E's ESA Program works with Grid Alternatives to deliver ESA services to customers that have been approved to participate in the Single Family Affordable Solar Homes (SASH) Program. On a regular basis, Grid Alternatives provides PG&E's ESA program with a list of SASH-eligible homes, prior to installing solar units. PG&E checks to see if any of these customers has participated in the ESA Program, and then notifies Grid Alternatives of the measures that were installed in the home. Grid Alternatives uses this data in their calculations to accurately size the SASH solar unit to be installed. In 2017, the ESA Program had treated 839 homes that were selected for SASH Program participation. PG&E also supplied ESA measure installation data for SASH-selected homes that were treated through the ESA Program in prior years.

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

Starting January 1, 2017, the electric IOUs were directed to provide to the Single-family Affordable Solar Homes Program Administrator, currently GRID Alternatives, with a monthly list of owner-occupied single-family households that have completed the ESA Program requirements of the CARE Program high usage process. The referral list contains, at a minimum, the ESA Program workflow outputs with the customer of record's name, address, phone number, preferred language, household income and size.

PG&E provided 3,954 referrals to GRID Alternatives in 2017.

1.8. Workforce Education and Training

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

In 2017, PG&E had 27 ESA contractors, with approximately 700 staff implementing the program in the field. PG&E's ESA Program implementation subcontractors hire most in-home workers from the communities in which they will be working. These ESA Program field personnel bring their local, in-language knowledge to help recruit participants from the communities in which they live and work. PG&E's training in ESA home assessment, energy education, weatherization services and measure installation, provides workers with skills and work experience that are transferable to other green jobs.

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

PG&E's Energy Training Center (ETC) has supported training for the ESA Program continuously for over 34 years. The ETC provides training for the weatherization specialists (installation crews) and energy specialists (assessors/educators) that implement PG&E's ESA Program. The ETC trained over 223 contractor staff in 2017 to work as Energy Specialists, Weatherization Specialists, Duct Test and Seal technicians, and NGAT technicians¹² for the ESA Program. Each of the students attending sessions at the ETC were hired by a participating contractor prior to attending.

ESA contractor training conducted at the ETC in 2017 is shown in the following table:

Table 1.8.2: 2017 ESA Program Training

Type of ESA Training Conducted	Length of Training	2017 Employees trained	Student Days
Energy Specialist (ES) Certification Training	8 day	66	528
Weatherization Specialist (WS) Training	3 day	80	235
NGAT Training ¹³	6 day	60	360
Duct Testing & Sealing	1 day	9	9
ESA Management Boot Camp	2day	8	16

ESA contractors were responsible for recruiting employees to implement the ESA Program. Contractors typically recruited and hired within their respective local communities, helping provide greater program awareness and acceptance within the communities served by the ESA contractor. These ESA Program field personnel bring their local, in-language knowledge and community ties to help locate and enroll ESA Program participants from the communities in which they live and work.

¹² NGAT training costs are recorded to PG&E's General Rate Case.

¹³ Ibid.

Some of the techniques used by ESA Program contractors to recruit potential employees include the following:

- Placing ads on Craig's List and other similar on-line sites
- Advertising in local newspapers
- Recruiting ESA program participants who express an interest in being an Energy or Weatherization Specialist
- Word of mouth within their respective communities

In addition to the ESA contractor training conducted above, PG&E's ETC and ESA Program worked together throughout 2017 to develop a new enhanced energy education curriculum. PG&E decided to include demand response and Time-Of-Use education as part of its new Enhanced Energy Education. PG&E also chose this timeline to correspond with the timing of the general Time-Of-Use default pilot¹⁴, assuring correlated messaging to customers. The ESA Enhanced Energy Education curriculum will focus training on energy saving tools for energy specialists to incorporate into their home assessment/educator role, with the overall goal of helping low-income customers to better understand and control their energy use and expenses. PG&E's ESA energy specialists will provide information to eligible customers about other programs and tariffs for which they might qualify, including demand response and Time-Of-Use. ESA customers are encouraged to enroll into PG&E low income, energy efficiency, and demand response programs, and PG&E will track and report on how many of these customers enroll in specific programs, in compliance with D.17-12-009 directives when Enhanced Energy Education is implemented. Enhanced Energy Education will be launched in 2018.

1.9. Legislative Lighting Requirements Status

1.9.1. Provide a summary on current and future compact fluorescent lamp (CFL) supply issues, as experienced by the IOU. Any current/future problems as well as potential solutions should be discussed in this paragraph.

In 2017, PG&E continued to provide low income customers participating in the ESA Program free CFLs. In late 2015, several lighting manufacturers announced they would stop manufacturing CFLs by the end of 2016 and would advocate LEDs as the preferred energy efficient household product. This led to the beginning of CFL supply issues in late 2016 and significant shortages starting in early 2017. The ESA Program 2015-2017 application proposed transitioning to LED lamps as a means of addressing potential CFL supply issues. D.16-11-022 approved transitioning to LEDs in 2017, and the ESA Program worked to have LEDs included in the Program in 2017. LEDs were introduced into the program on January 2, 2017 and CFLs were fully phased out September 30, 2017.

1.9.2. Provide a summary explaining how IOU promotes the recycling/collection rules for CFLs.

PG&E continued to provide a CFL Recycling fact sheet to all ESA Program participants in 2017. This was provided and discussed by the ESA Program Energy Specialist during the energy education/energy assessment home visit. The fact sheet explains what mercury is and why it is harmful to people and the environment, and describes safe CFL

¹⁴ D.15-07-001 Authorized the general Time-Of-Use default pilot.

removal and storage practices, including safe disposal of used CFLs and what to do when a CFL breaks. Currently, ENERGY STAR® requires manufacturers to print a CFL recycling resource website on CFL packages. Safe CFL recycling practices are also covered during ESA Program contractor training modules.

1.9.3. Complete Table 15 (in Appendix). In addition, please briefly summarize the CFL procurement process for the IOU, including manufacturers, distributors, warehousing, and contractor delivery.

During PY2017, ESA Program contractors directly purchased CFLs and other CFL lighting products used in the ESA Program through wholesale materials vendors and big box retail outlets. In addition, LEDs were all purchased through a bulk materials supplier.

1.10. Studies

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

Four statewide studies were proposed by the IOUs for the 2015-2017 ESA Program cycle following the procedures in the Guidance Document issued in D.14-08-030. These statewide, joint IOU studies were: (1) a low income needs assessment (LINA) study; (2) an impact evaluation of the 2015 ESA Program (Impact Evaluation); (3) a non-energy benefits (NEB) and equity criteria evaluation; and (4) a Phase II ESA energy education study. D.16-11-022 authorized three of the proposed studies: the LINA study, the Impact Evaluation, and the NEB study. The Phase II ESA energy education study was not authorized. The three authorized studies are discussed below.

Table 1.10.1 provides an overview of the Statewide ESA Studies.

Table 1.10.1: D.16-11-022 and D.17-12-009 Approved ESA Studies

Study	Lead Consultant	Contracting IOU	Project Initiation	Project Completion	Statewide Budget	PG&E Budget ¹
2019 Statewide LINA	Research Into Action	SCE	2/14/2018	12/2019	\$500,000	\$150,000
PY2015 Statewide ESA Impact Evaluation	DNV GL	SoCalGas	1/26/2017	2019	\$550,000	\$165,000
Statewide NEBs Study	TBD	SDG&E	2018	2018	\$150,000	\$45,000
ESA Portion of the Statewide Energy Efficiency Potential Study	Navigant	N/A	TBD	TBD	\$300,000	\$90,000
Rapid Feedback Research & Analysis ²	TBD	N/A	TBD	TBD	N/A	\$200,000
Total					\$1,500,000	\$650,000

¹ This amount represents the total Joint Utility study budget, authorized in D.16-11-022. The authorized Joint Utility budget split for all studies is: PG&E--30%, SCE--30%, SCG--25%, and SDG&E--15%

² Rapid Feedback Research & Analysis is not a statewide study. Each IOU has its own budget with which to propose research. During 2017, no rapid feedback studies or analyses were initiated by PG&E

Statewide Low Income Needs Assessment (LINA) Study

The LINA Study is mandated to be updated every three years per AB327 and PUC Sec. 382(d), Energy Division and the IOUs initiated the upcoming (2019) LINA with a public workshop on May 19, 2017 to discuss the scope of work for the LINA authorized in D.16-11-022. In March 2017 the Joint IOUs sought to have the recommended scope modified via a Petition for Modification. The Joint IOUs' Petition for this item was denied in December 2017. The Energy Division and Joint IOUs prepared and released a Request for Proposal (RFP) for this work in November 2017. Research Into Action was selected as part of the competitive bidding process in January 2018. SCE holds the contract which was completed in January 2018. A project initiation meeting was held in February 2018. A public workshop is anticipated to be held during Q2 2018 following the development of the draft research plan. The 2019 LINA Study will be completed by December 2019.

Statewide ESA Energy Savings Impact Evaluation

Current ESA impacts are necessary for planning the next program cycle, and following the direction of Energy Division, the Joint IOUs issued a RFP to conduct the time-sensitive statewide ESA impact evaluation in November 2015. The project was awarded via a competitive bid to DNV-GL in February 2016, pending authorization of the study by the Commission. The contract is held by SoCalGas and was finalized in January 2017 after official authorization via D.16-11-022. The study initiation meeting was held in February 2017. A public workshop on the research plan was held in September 2017. Initial results are anticipated in March 2018, to be used in the Mid-Cycle Update Advice

Letter filing on July 16, 2018. The Final Report is expected to be completed in March, 2019.

Statewide ESA Non-Energy Benefits (NEB) and Equity Criteria Study

The scope of work for the ESA NEB Study was developed in consultation with the Cost Effectiveness Working Group in 2017. The joint IOUs released a RFP in 2018. SDG&E is the contract manager for this statewide study expected to commence in April 2018. The final report for this study is expected by Q.3 2018.

D.16-11-022 and D.17-12-009 Evaluation Requirements

D.16-11-022 and D.17-12-009 identify the benefit of following guidelines established in the mainstream Energy Efficiency proceeding. Studies are required to solicit public input on research and deliverables via workshops or webinars and the CPUC's public documents area at energydataweb.org. Parties are encouraged to submit written comments on the work before and/or after the public meetings; these comments will be posted on the public document website. Notice of the public meetings will be sent to subscribers on the public document website and to the applicable service. Beyond the authorized studies, any additional studies or analyses commenced via the ESA Program Rapid Feedback and Analysis funding adhere to on the project initiation and execution requirements outlined in Section 5 of *Energy Division & Program Administrator Energy Efficiency Evaluation, Measurement and Verification Plan Version 5270*.

1.10.2. If applicable, submit Final Study Report describing: (1) overview of study; (2) budget spent vs. authorized budget; (3) final results of study; and (4) recommendations.

No studies were completed in 2017.

1.11. Pilots

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

Consumption Driven Weatherization (CDWx) Pilot

PG&E proposed a CDWx Pilot in its 2015-2017 ESA Program Application to selectively offer additional weatherization measures that fall outside current ESA Program guidelines for high usage, high potential customers identified via AMI analysis. D.16-11-022 Ordering Paragraph 144 directed a 12 month pilot implementation period to fully integrate AMI into the ESA Program as rate reform adjustments are underway. This pilot is anticipated to yield information that will help overall AMI integration and to identify steps to help reduce high energy use among CARE customers that leads to higher bills.

During 2017, PG&E discussed with the California State Department of Community Services and Development (CSD) opportunities to work together on this pilot. In December 2017, PG&E requested and was granted an extension to implement this pilot in 2018 so that CSD could be included in it. Following the expressed interest of CSD regarding ways to increase leveraging opportunities, CSD joined PG&E in this CDWx pilot offering. The pilot will now incorporate measures from CSD's Low-Income Home

Energy Assistance Program (LIHEAP) program. Collaborating with CSD provides increased opportunities to leverage both funding and data analysis, which is anticipated to result in more cost effective targeting as well as increased benefits to high-energy use low income customers. The CDWx pilot will continue to use data-driven analysis to target high usage customers to receive additional weatherization measures that fall outside current ESA Program guidelines, with the added benefit of including CSD's offerings and applying lessons learned from the previous PG&E-CSD Leveraging Pilot.

Implementation is planned to start in Q2 2018 and will continue through the end of Q3 2018, with evaluation of pilot starting Q4 2018 and continuing into Q1 2019. The pilot plans to weatherize 50 homes for qualified customers who are also high energy users. The customer data pull is complete and outreach is starting now.

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

No ESA Program pilots were completed in 2017.

1.12. "Add Back" Measures

For measures that fall below the cost effectiveness threshold under D.12-08-044, the Commission required additional reporting to show the cost, energy savings impacts, and related metrics, per D.12-08-044, OP 38b.

The previous ESA cost effectiveness framework focused on measures that met the minimum 0.25 cost effectiveness threshold, in compliance with D.12-08-044, OP 36 directives that the IOUs shall ensure installation of those measures. D.12-08-044 also "added-back" into PG&E's ESA Program some measures with cost effectiveness scores below the adopted threshold, based on perceptions that these add-back measures provided comfort, health, or safety non-energy benefits that may not have been adequately quantified in the ESA Program's cost effectiveness tests.

Cost effectiveness for the 2017-2020 ESA program was based on a portfolio approach rather than on the cost effectiveness of individual measures, thus D.16-11-022 did not "add back" specific measures based on their cost effectiveness. PG&E's add-back measures for 2017 were determined by Appendix H.1 and Appendix H.2 in D.12-08-044. Add-back measures were measures having cost effectiveness scores below 0.25 in the Utility Cost Test and/or the Modified Participant Cost Test.¹⁵ Add-back measures included both measures that had been requested by PG&E and included in its 2012-2014 ESA budget application, as well as measures ordered through D.12-08-044 that were not included in PG&E's budget application.

The add-back measure expenditures (\$13,037,871) comprised 13 percent of PG&E's total \$101,135,407 ESA measure expenditure in 2017 and are well within the program's

¹⁵ Previously included ESA measures only had to pass the cost effectiveness threshold of 0.25 for one test; new measures proposed to be added into the 2012-2014 ESA Program were required to pass the cost effectiveness threshold for *both* of these two cost effectiveness tests authorized for the 2012-2014 ESA Program.

approved budget. See Table 16 – Add Back Measures for the cost, energy savings impacts, and related metrics.

1.12.1. If the "add-backs" compromise the IOUs' ability to meet the 2020 Plan goal that 100 percent of eligible and willing customers will have received all cost effective ESA Program measures, how does the IOU propose to address the shortfall in other parts of the ESA Program?

PG&E's 2017 ESA Program installed ESA authorized measures based on the cost effectiveness framework and impacts authorized for the 2017-2020 cycle. New cost effectiveness tests authorized for ESA in D.14-08-030, D.16-11-022, and D.17-12-009 were based on recommendations of the Cost Effectiveness Working Group formed pursuant to D.12-08-044.¹⁶

PG&E used the new ESA Cost Effectiveness Test (ESACET) and Resource Measure Total Resource Cost Test (Resource Measure TRC) to assess cost effectiveness of the ESA Program. A significant difference from previous ESA program authorization was that ESA program approval in D.16-11-022 was based on the cost-effectiveness results of the entire program portfolio, rather than at the measure level. Thus, although measure level data and cost effectiveness thresholds were provided in PG&E's 2015-2017 Application (and are used by PG&E and the other IOUs to help them balance their ESA portfolios to increase overall program savings), individual measures were not "added back" into the program based on measure thresholds, as was previously the case for the 2012-2014 program cycle.

In July 2018, PG&E will file a Mid-Cycle Update Advice Letter, in compliance with D.17-12-009. PG&E is actively reviewing and reevaluating measures in its ESA portfolio to determine potential measures to add or retire to help meet the 2020 Plan goal that 100 percent of eligible and willing customers will have received all cost effective ESA Program measures.

1.13. Low Income Working Groups

D.12-08-044 authorized Energy Division to form three Working Groups during the 2012-2014 program cycle: (a) the ESA Cost-Effectiveness Working Group, (b) the ESA Workforce, Education and Training Working Group, and (c) the Mid-Cycle Working Group to review those components of the Commission's ESA and CARE Programs to make recommendations for refinements to improve, wherever possible, the design, administration, delivery and ultimate success of these programs. D.16-11-022 reconvened the Cost Effectiveness and Mid-Cycle Working Groups and convened a new Multifamily Working Group. 2017 Working Group activity is summarized below.

ESA Cost Effectiveness Working Group

Decision 16-11-022 instructed the Cost Effectiveness Working Group to reconvene and address the tasks outlined below. The members participating in the Working Group include representatives from the following organizations: CPUC Energy Division, CPUC Office of Ratepayer Advocates, National Resources Defense Council, The Utility Reform

¹⁶ Cost Effectiveness Working Group, Energy Savings Assistance Program Cost Effectiveness White Paper (February 14, 2013) and Addendum to the Energy Savings Assistance Program Cost Effectiveness Working Group White Paper: Working Group Final Recommendations (July 15, 2013).

Network, TELACU/ACCES/Maravilla, Synergy Companies, Southern California Edison, Pacific Gas and Electric Company, Southern California Gas Company, and San Diego Gas & Electric Company.

- a. Submit a proposed schedule and work plan to the low income proceeding service list no later than 60 days after the date of Decision approval.
- b. Provide recommendations on the following issues to be used to inform the next program cycle; these recommendations or a progress report are to be distributed to the service list no later than the second quarter of 2018.
 - i. Identify measures to include/exclude in the adjusted ESACET;
 - ii. Determine how to exclude administrative costs and NEBs associated with excluded measures from the adjusted ESACET including program costs not tied to a specific measure;
 - iii. Determine how to allocate administrative costs and NEBs across program measures;
 - iv. Determine how to incorporate revised NEB values into the adjusted ESACET;
 - v. Determine if and how to incorporate into the ESACET benefits and costs for ESA investment in other programs such as demand response; and
 - vi. Work with the IOUs to who will be conducting a NEB study.

Item A was submitted to the service list on January 11 2017. The Working Group met monthly through 2017 both by teleconference and in person to discuss the topics in Item B. The Working Group began drafting a report in quarter four of 2017 including all of the recommendations for Item B. Final recommendations will be finalized in 2018.

Mid-Cycle Working Group

D.16-11-022 tasked the Mid-Cycle Working Group with four deliverables:

- a. Making recommendations for updates to the Energy Savings Assistance (ESA) Statewide Policy and Procedure Manual, California Installation Standards Manual, and monthly and annual reporting criteria to align it with Decision D.16-11-022.
- b. Provide recommendations on the adoption of on line data reporting systems (ODRS) for the ESA Program to help the investor-owned utilities (IOUs) and Commission better understand how these systems collect and report workforce data. This assessment should help determine the value of adopting ODRS for the ESA Program into IOU operations, its cost benefits, and identify any administrative burdens to implement by either contractor or utility.
- c. Making recommendations for the household retreatment prioritization models, implementation and outreach strategies, and other aspects of the ESA Program.
- d. Investigate and make recommendations on how the ESA Program may be used to deploy tools to enable greater Energy Efficiency and Demand Response participation by California Alternate Rates for Energy (CARE) and ESA participants in recognition of the increased State goals detailed in SB 350.

Mid-Cycle Working Group member organizations are: CPUC Energy Division CPUC ORA, California Housing Partnership Corporation, Southern California Edison Company, Pacific Gas and Electric Company, Southern California Gas Company, San Diego Gas & Electric Company, Energy Efficiency Council, TELACU, and Proteus.

In April 2017, the Mid-Cycle Working Group submitted initial recommendations on each of these items. The Working Group met throughout 2017 to update the Statewide Policy and Procedure Manual and the California Installation Standards Manual, and provided

input on the monthly and annual reporting criteria. A public webinar on these manuals and reporting criteria was held on January 31, 2018. The Working Group plans to resolve its primary recommendations in the 2nd Quarter of 2018 for the IOUs to consider in their Mid Cycle update Advice Letters to be filed on July 16, 2018.

Multifamily Working Group

The MFWG was established to support the integration of common area measures for deed restricted multifamily (MF) properties into the Energy Savings Assistance (ESA) program and other MF directives as specified in Decision 16-11-022. PG&E participated in the Multifamily Working Group throughout 2017.

Multifamily Working Group member organizations include: CPUC Energy Division, CPUC ORA, Southern California Edison Company, Pacific Gas and Electric Company, Southern California Gas Company, San Diego Gas & Electric Company, California Housing Partnership Corporation, Natural Resources Defense Council, National Consumer Law Center, Community Housing Opportunities Corporation, TELACU, and Proteus.

The Multifamily Working Group detailed its 2017 activities in the MFWG 2017 Annual Report. [Click here to view the document](#)

Demand Analysis Working Group

D.17-12-009 Attachment 1, OP.8 identified a new Demand Analysis Working Group (DAWG) to act as the established forum for providing input into the scope, modeling and analysis of results associated with the Energy Efficiency Potential Study (EE Potential Study). Low income energy efficiency was included in the 2017 EE Potential Study as an input – i.e. the study did not identify optimal levels of low income energy efficiency savings to pursue. This was due to resource constraints within the 2017 EE Potential Study. More detailed modeling of low income energy efficiency is planned to be included in the next (2019) EE Potential Study, which uses the DAWG for stakeholder engagement and review of the study. The 2019 EE Potential Study would be due in May 2019, and is anticipated to begin in the fall of 2018.

1.14. Annual Public ESA-CARE Meeting

D.12-08-044 ordered the IOUs to convene a minimum of one public meeting per year, within 60 days of their filing of the annual report, and other public meetings as deemed necessary by the IOUs, the Energy Division, the ALJ, or the Commission.

In compliance with D.12-08-044, PG&E and the other IOUs held a public forum in San Francisco, California on June 22, 2017. The IOUs presented an overview of their 2016 ESA and CARE results.

1.15. Multifamily Properties

1.15.1. The IOUs shall conduct and report an annual analysis of the square footage, energy consumption, ESA Program participation, and time since the last retrofit of non-deed restricted multifamily properties with a high percentage of low income tenants.

PG&E did not begin this analysis in 2017. PG&E expects this analysis of non-deed restricted multifamily properties to rely on its Common Area Measure Initiative experience and learnings with deed-restricted properties. .

D.17-12-009 also directed the IOUs to report on OBF participation of multifamily properties in their Annual Reports. No multifamily OBF applications were issued or reviewed in 2017.

1.15.2. Describe coordination efforts with the California Advanced Services Fund's new Broadband Public Housing Account.

PG&E did not begin this analysis in 2017. PG&E will explore coordination in 2018 as the Common Area Measure Initiative gets underway. Potential coordination efforts with the California Advanced Services Fund's Broadband Public Housing Account will also be discussed and considered by the Multifamily Working Group in 2018.

1.16. Natural Gas Appliance Testing (NGAT) Performed

The Statewide ESA Policies and Procedures Manual defines when homes should receive an NGAT: "After completion of weatherization that includes infiltration reduction measures, NGAT is performed for all natural gas appliances affecting the living space."

Table 1.16.1 outlines the NGAT tests performed in the ESA Program.

Table 1.16.1: NGAT Tests Performed

NGAT Tests Performed	
Homes Requiring NGAT	51,525
NGAT Performed	43,630
NGAT Not Performed	7,895
NGAT not Performed due to customer refusal or contractor inability to get into the home	285

* While these homes receive infiltration reduction measures, NGAT was not required in 7,576 homes because these homes were all electric or had no gas appliance affecting living space. No remediation was required.

2. California Alternate Rates for Energy (CARE) Program

CARE Program Overview

The CARE program provides a monthly discount on energy bills for qualifying residential single-family households, tenants of sub-metered residential facilities, nonprofit group living facilities, agricultural employee housing facilities and migrant farm worker housing centers throughout PG&E's service area. Since its inception, the CARE program has provided nearly \$8.8 billion in bill discounts to PG&E's qualified customers.

The CARE program was originally referred to as the Low Income Rate Assistance (LIRA) Program, as authorized in D.89-07-062 and D.89-09-044 by the CPUC on November 1, 1989, to provide a 15 percent discount on energy rates to residential households with income at or below 150 percent of the Federal Poverty Guidelines (FPG). The program name was later changed from LIRA to CARE as authorized in D.92-04-024.

In D.01-06-010 and D.02-01-040, the CPUC authorized an increase in CARE eligibility from 150 percent to 175 percent of FPG and the rate discount from 15 percent to 20 percent. The CARE eligibility level was later increased to 200 percent of the FPG in D.05-10-044.

Assembly Bill (AB) 327 (Perea 2013) revised Public Utilities Code Section 739.1. (a) to require that the CARE income eligibility level for one-person households to be based on two-person household guideline levels effective January 1, 2014. AB 327 also established that the CARE electric discount be no less than 30 percent and no greater than 35 percent of revenue.

D.16-11-022, issued on November 21, 2016, adopted the 2017-2020 CARE Program. General Rate Case D.17-05-013 issued on May 18, 2017 approved employee benefit costs for 2017-2019.

D.17-12-009, issued on December 14, 2017, resolved two Petitions for Modification of D.16-11-022 which adopted budgets and program directives for 2017-2020 CARE Program.

D.15-12-047, issued on December 17, 2015, approved the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) as an ongoing statewide program, effective January 1, 2016. The CHANGES Pilot Program would continue on a month-to-month basis until the ongoing CHANGES program contract, including selection of Community-Based Organizations under the new consultant contract, can commence. D.16-11-022 approved the budget for on-going CHANGES program for 2017-2020, funded from the CARE Program until a long-term Commission funding source can be established through budgetary and/or legislative channels.

2.1. Participant Information

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

See CARE-Table 8 – Participants per Month.

During the 2017 program year, no monthly variances of 5 percent or more occurred.

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

PG&E and the other California IOUs used the joint utility methodology adopted by the CPUC in D.01-03-028 for developing monthly penetration estimates in 2017. This method entails annual estimation of eligibility for CARE, ESA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

The requirements for 2017 eligibility, corresponding to the current estimation, again used the January Health and Human Services (HHS) Poverty Guidelines [Federal Register /Vol. 82, No. 19 /Tuesday, January 31, 2017 /Notices; p.8832], "bundling" one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327.

Sources for the estimation include the current HHS guidelines, current year small area vendor marginal distributions on household characteristics, Census 2010 SF3 data, Census American Community Survey 2011-2015 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources. An important change has been implemented since 2011, which involves adjusting small area (block group) income distributions to match the latest American Community Survey distributions at the Public Use Microdata Area.

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

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

In 2009, the method was augmented to better incorporate the impact of labor force changes (unemployment and other forms of job separation, as well as positive changes that are expected to occur in California subsequent to the recession). The method adjusted block group marginal distributions on household income based on sub-state modeling that incorporated Current Population Survey, Integrated Public Use Microdata Survey data, American Community Survey Data, and California Employment Development Department county and Metropolitan Statistical Area level labor force series. This adjustment to block group income marginal is then incorporated into the otherwise "standard" estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

In 2012, Athens developed an improved method for estimation of payer status-specific eligibility. This method took into consideration American Community Survey microdata relationships between guideline status (above/below 200 percent FPG), tenure, and fuel payment relationships. These cross-classifications are fitted to small area (block group) marginal to produce payer-type specific distributions, which can be aggregated to various other geographical levels.

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

The joint utility methodology, as described above, was used throughout 2017.

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

CARE eligibility rates by small and large areas are developed so that they apply to individual residential meters and sub-metered dwelling units only. Non sub metered master meters and other meters that do not provide residential service are not included in the “technical eligibility” meter counts.

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

See PG&E’s response above to Section 2.1.2. Note that the methodology is based on estimating small area (block group) level household size by income and householder-age tabulations for the current year and connecting these estimates with small area counts of households that are individually metered or sub metered. Block group/utility-specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area: zip+2, zip, tract, county, territory, etc. Statewide estimates, regardless of utility boundaries, are also provided at small and large area levels.

2.1.2.4. Describe how current CARE customers were counted.

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

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

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

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

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

Electric-only:	32.3%
Gas-only:	31.8%
Combined electric/gas:	27.9%
Total:	29.5%

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

PG&E estimates that 52,908 electric and 40,178 gas sub metered tenants were eligible for CARE at year-end.

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

As of year-end 2017, there were 27,461 electric and 23,770 gas sub-metered tenants enrolled in CARE.

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

As of year-end 2017, approximately 52 percent of the estimated CARE eligible sub metered electric tenants and 59 percent of the estimated CARE eligible sub metered gas tenants were enrolled in CARE.

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

To make the CARE program available to eligible tenants of sub-metered residential facilities, PG&E mails information packets containing program applications to landlords/managers annually. However, some of these packets are either returned or undelivered due to the high turnover of landlords/managers. This results in lower new enrollments than expected.

Some landlords/managers were concerned that their CARE-enrolled tenants used more energy than the average tenant in the facility. This resulted in the master metered customer having to pass on more of a discount than they received from PG&E. In these cases, PG&E explained to the landlord/manager how the sub metered discount works. If the landlords/managers were not satisfied, PG&E advised the landlords/managers to contact the CPUC or their County's Department of Weights and Measures.

Another problematic issue was the insufficient discount information on the tenant bill from the facility billing agency. For example, the CARE discount might not be shown as a separate line item, making it difficult for the tenant to verify whether they were receiving the discount. When a tenant called PG&E with questions, PG&E confirmed that the tenant was certified for the program and reviewed the bill with the tenant to ensure they were receiving the discount. If it appeared the tenant was not receiving the CARE discount, the tenant was advised to contact their manager or billing agency for further clarification. California Civil Code Section 798.43.1(c) requires that: "The management shall notice the discount on the billing statement of any homeowner or resident who has qualified for the CARE rate schedule as either the itemized amount of the discount or a notation on the statement that the homeowner or resident is receiving the CARE discount on the electric bill, the gas bill, or both the electric and gas bills."

If the tenant did not obtain resolution with their billing agency and/or sub-metered facility manager, PG&E advised the tenant to contact their County's Department of Weights and Measures (DWM). DWM helps tenants with meter reading accuracy/testing, proper meter installation, billing accuracy, and verification of correct rate. If contacting the DWM did not resolve the tenant's billing question, the tenant was advised to file a complaint with the CPUC.

PG&E provides a CARE certification report to landlords/managers at regular intervals. PG&E also requests landlords/managers to contact PG&E when updated information is needed. Nonetheless, some landlords/managers still fail to notify PG&E when a CARE certified tenant moves out of the facility. In order to solve this problem, PG&E provided detail instruction on the certification report cover letter that required the landlords/managers to notify PG&E in writing via email or fax if certified tenants have moved out.

PG&E observed a continued issue related to turnover within Mobile Home Park (MHP) ownership and management. When changes in ownership happened, PG&E worked with the new owners to transfer existing CARE certified tenant data to new accounts, and informed them about the CARE Program and the processes involved. When landlords change managers, they often fail to notify PG&E with new contact information which results in undelivered reports and delayed communications.

Some tenants move from one MHP to another MHP or from a residential house to a MHP and thought their CARE discount would automatically transfer. PG&E had to explain to them that their CARE discount was not transferable, and advised them to fill out a Sub-Meter application to re-apply for the CARE Program. Some new MHP owners or managers did not know how to calculate electricity and gas discounts for their tenants. PG&E's CARE staff provides high-level information regarding the tiered rate structure or refers them to the billing department for more detailed explanations.

Many MHPs have multiple account numbers or have different account numbers for either electric or gas which causes a great deal of confusion to MHP owners, tenants and CARE staff when enrolling and administering the discount. The owner or the tenant often provides the wrong account number or does not provide all of the applicable account numbers during the enrollment process, resulting in CARE staff mis-certifying or not being able to certify the tenant on all accounts.

2.2. CARE Budget Summary

2.2.1. Please provide CARE program summary costs.

CARE Budget Categories	Authorized Budget[1]	Actual Expenses[1]	% of Budget Spent
Outreach	\$10,043,108	\$7,191,150	72%
Processing, Certification, Recertification	\$1,985,120	\$1,069,201	54%
Post Enrollment Verification	\$1,611,838	\$1,473,161	91%
IT Programming	\$1,843,221	\$1,294,602	70%
Cooling Centers	\$137,447	\$124,126	90%
CHANGES Pilot Program	\$532,126	\$509,420	96%
Measurement and Evaluation	\$146,902	\$134,677	92%

Regulatory Compliance	\$500,235	\$374,176	75%
General Administration	\$1,132,004	\$873,583	77%
CPUC Energy Division Staff	\$128,000	\$124,817	98%
Total Expenses	\$18,060,001	\$13,168,911	73%
Subsidies and Benefits	\$580,353,000	\$643,538,184	111%
Total Program Costs and Discounts	\$598,413,001	\$656,707,096	110%

[1] Program authorized budget per D.16-11-022, and actual expenses have been updated to include employee benefits costs approved in the GRC D.17-05-013.

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

CARE Penetration			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?[1]
1,406,396	1,588,016	89%	No

[1] PG&E interprets the target to be the 90% CARE penetration goal set in Decision 08-11-031 by the Commission. PG&E is currently on pace to meet this goal by the end of the 2017-2020 budget cycle.

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

Month	Complaints Received	Nature of Complaint	Cases Resolved
January	0	n/a	n/a
February	0	n/a	n/a
March	0	n/a	n/a
April	0	n/a	n/a
May	0	n/a	n/a
June	0	n/a	n/a
July	0	n/a	n/a
August	0	n/a	n/a
September	0	n/a	n/a
October	0	n/a	n/a
November	0	n/a	n/a
December	0	n/a	n/a

2.3. CARE Program Costs

2.3.1. Discount Cost

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

Electric: \$37.60

Gas: \$8.53

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

Electric: \$533,683,875

Gas: \$109,854,309

Total: \$643,538,184

2.3.2. Administrative Cost

2.3.2.1. Show the CARE Residential Program's administrative cost by category.

See CARE-Table 1 – Overall Program Expenses.

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

Outreach: This cost category includes:

- Marketing and outreach campaigns, such as direct mail, e-mail, telemarketing, AVR, digital media and radio
- Retention outreach
- Printing of bill inserts, applications, advertising and promotional materials, annual notifications to Sub-metered facilities (SB 920), and other CARE Program materials.
- Postage and handling fees
- Purchase and storage of promotional items, other goods and supplies
- CARE toll-free line maintenance and operation
- Capitation fees to Community Outreach Contractors for new CARE enrollments and assistance with the Post Enrollment Verification process, community event costs, community outreach activities and partnerships
- Staff labor related to marketing and outreach
- Other expenses include travel, membership fees, sponsorships, conferences, catering and other outreach-related costs

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

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

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

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

IT Programming: This category includes:

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

Cooling Centers: This cost category encompasses day-to-day administrative tasks associated with operating cooling centers, including:

- Direct funding to cooling centers/program administrators
- Printing of bill insert, brochures and other materials
- PG&E's Cooling Centers website and toll-free line maintenance and support
- Staff labor
- Travel expenses and other program management related costs

Pilots: This cost category includes any pilot projects for the program. For 2017, this includes the reimbursement cost for the ongoing CHANGES program and staff labor to support the program.

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

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

- Program applications
- Advice letters
- Tariff revisions, comments and reply comments
- Hearings

- Preparation of regulatory compliance reports
- Preparation of data request responses
- Attendance at working group sessions, public input meetings and public workshops
- Travel expenses and other related costs

General Administration: This category includes:

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

CPUC Energy Division Staff: This cost category includes funding for Energy Division staff.

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

At year-end December 31, 2017, the CARE electric balancing account was under-collected and reflects a year-end debit balance of \$23,438,935 while the CARE gas balancing account was over-collected and reflects a year-end credit balance of \$21,905,917.

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

D.02-09-021 authorized the recording of all CARE administrative costs as well as the revenue shortfall associated with the CARE discount in the CARE balancing account.

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

See CARE-Table 10 – CARE Surcharge & Revenue.

2.4. Outreach

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

Acquisition Outreach

During 2017, PG&E continued use of multi-touch, multi-channel acquisition campaigns targeting customers with a high propensity for eligibility as well as those who had participated in the program but did not recertify. Campaigns included direct mail, email, and digital in both English and Spanish to reduce language barriers. PG&E also ran a TV and radio campaign in Q3, with another radio flight in November and December. The TV

campaign re-used the “New Start” spots launched in 2016, and introduced a new radio script that aligned with the creative strategy for the TV spot.

Integration with broader PG&E campaigns were focused on key seasonal periods, with Winter-themed CARE creative deployed in December. The campaign included direct mail, email, Facebook ads, banner ads and bill inserts with Winter messaging and imagery.

With the devastating wildfires that impacted Northern California in October, PG&E paused acquisition campaigns going to affected areas. Suppressions were applied to remove customers with homes in impacted counties were from campaigns starting in mid-October, through the end of 2017.

Sample Creative:



Don't lose out on your 20% savings

CARE helps keep your home cozy this winter.

John G. Sample
2017 GAS&E-023 (PG&E) 04-01
100 West St.
San Francisco, CA 94105-0001

December 6, 2017

Dear {name},

Last year, more than 1.4 million Californians just like you made their dollars really count. How? By signing up for the California Alternate Rates for Energy (CARE) program. Join them and get deep discounts on your energy bills this winter. Chances are you're already eligible. It only takes like minutes to apply, and no proof of income is needed.

Claim your energy discount. Sign up for CARE now!

Your account number is **8123456789-1**. You'll need this for the application.

- **Online:** Go to pge.com/wintercare. It's the fastest way to apply.
- **Phone:** Call us at 1-866-362-2272 and we'll walk you through it.
- **Mail:** Complete the enclosed application form and mail it back to us.

We're ready to answer any questions you might have about signing up for the CARE program. So don't hesitate to ask. Email us at careprogram@pge.com or call 1-866-362-2272.

When you qualify and enroll in CARE, you may also qualify for free home upgrades. The Energy Savings Assistance program provides free energy-saving home upgrades, whether you rent or own your home. Find out more at pge.com/esa/winter.

Sincerely,
Your Partners at PG&E

P.S. Know anyone who might also like big savings on their monthly energy bills this winter? Please refer them to pge.com/wintercare to see if they qualify.





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Act now and save 20% or more every month

[Claim your discount »](#)

Did you know that the California Alternate Rates for Energy (CARE) program was created for everyday Californians like you?

If your household meets the **current income qualifications**, or if someone in your household participates in **qualified public assistance programs**, you can save at least 20% on your monthly energy bill with CARE. **And chances are, you're already eligible.**

- It's easy to apply online
- You don't need proof of income to apply
- Once your application is approved, you'll see your monthly savings on the first page of your bill

Stay warm this winter. Join the 1.4 million Californians who are already saving money with CARE!


Have questions? Just email us at careprogram@pge.com.

Winter is here. Claim your monthly energy savings discount

View this email as a web page »

Ver en español

Claim your monthly energy savings discount



Act now and save 20% or more every month

[Claim your discount »](#)


Did you know that the California Alternate Rates for Energy (CARE) program was created for everyday Californians like you?

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Stay warm this winter. Join the 1.4 million Californians who are already saving money with CARE!

Have questions? Just email us at careprogram@pge.com.



Together, Building a Better California

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For inquiries, please do not reply to this email. Submit feedback via [Contact Us](#). PG&E refers to Pacific Gas and Electric Company, a subsidiary of PG&E Corporation. 77 Beale St., San Francisco, CA 94105-0201. Pacific Gas and Electric Company. All rights reserved. These offerings are funded by California utility customers and administered by PG&E under the auspices of the California Public Utilities Commission. CRS-1217-0004



Stay warm and cozy this winter





while you save 20% on your PG&E bill





Join the CARE program and save 20% or more every month

[Claim your discount »](#)



Response rates for direct mail and email campaigns remained consistent with 2016 results. Direct mail average response rates were approximately 14%, and email was 3%. Quarterly direct mail and email campaigns delivered a total of 44,557 enrollments in 2017.

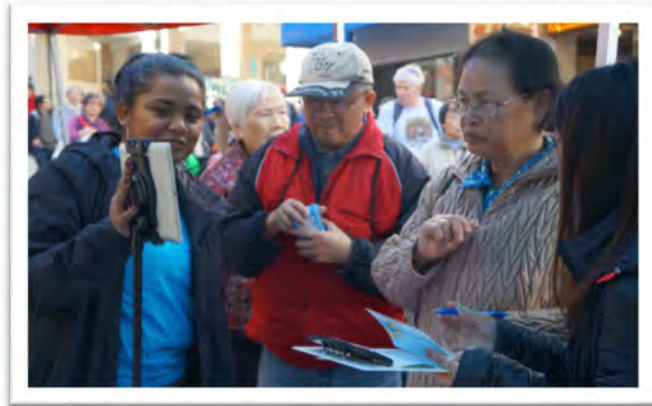
Testing of the SMS/text response channel continued in 2017 with a text response option offered in email and radio. Customers responding via text were offered the opportunity to opt-in to answer the enrollment questions in a simple stream of questions. Text response was rolled-out in all English acquisition emails in Q2, and in Q4 PG&E launched a Spanish text question stream for customers responding to Spanish language emails. The SMS/text option has shown positive results, with over 1,000 enrollments completed via text in 2017.

The CARE digital campaign remains an important part of the media mix, driving a significant number of enrollments for the program. PG&E executed an “always-on” digital strategy, ensuring CARE program visibility and top-of-funnel engagement with customers year-round.

In addition, the CARE/FERA insert and application was included in customers’ monthly bill package six times throughout the year, targeting residential customers who are not currently participating in CARE. The digital campaign, and bill inserts, each delivered over 19k enrollments throughout the year.

PG&E hosted several outreach activation booths during the month of January and February at Chinese Lunar New Year events and local grocery locations that serve the Chinese community. Representatives focused on promotion of PG&E's low income programs, offering help to customers in-language with questions and on-site enrollment. Radio promotions on Chinese stations aired prior to events to drive awareness and foot traffic.

Lunar New Year Booth photos:



PG&E also continued the CARE new mover program delivered via Allconnect through September 2017. Allconnect is a third-party service provider that offers assistance to those who would like help setting up cable, internet and satellite services when moving to a new home or apartment. During this process, the representative asks a series of questions, and will offer to send the customer information to enroll in CARE if qualified. Over 4k customers were enrolled in CARE through the new mover program.

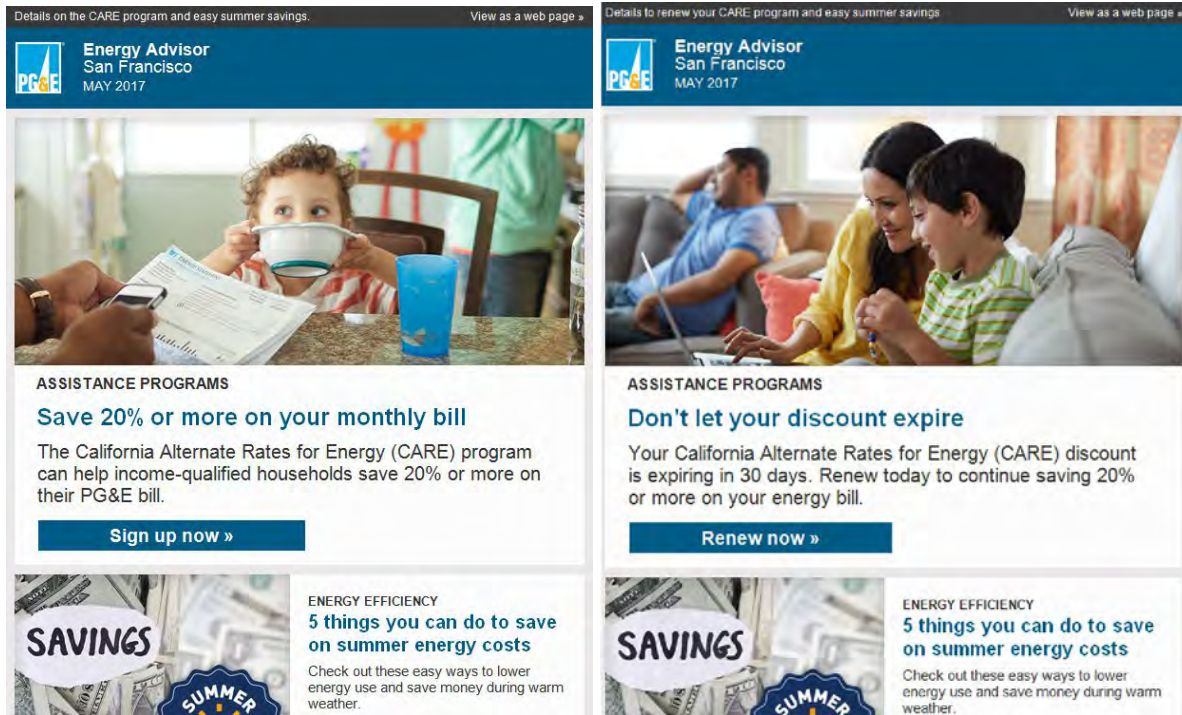
In August, PG&E's Product Development division selected a new vendor to manage the overall mover services program, requiring a transition of the CARE campaign from Allconnect, to a new vendor. The campaign was paused in Q4 to develop a new agreement with the selected vendor, and is expected to re-launch in 2018.

In 2017, PG&E continued its monthly digital newsletter targeting customers with a high propensity for eligibility in the CARE and ESA Programs. The CARE program was highlighted in the May digital newsletters, with content tailored based on whether the

customer was CARE-eligible or up for recertification. In the other months, the digital newsletter provides energy savings tools and tips to help customers better manage their energy usage. The newsletter continued to see strong open rates in the low-to-high 20% and good click-through rates ranging from 1.6-6% depending on the topic.

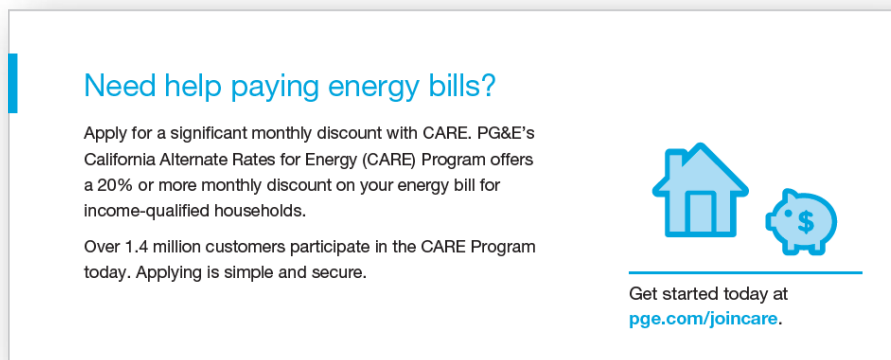
CARE-eligible version

CARE recertification version



PG&E also included a CARE promotion module in the Home Energy Reports (HERs) in the April and May print and electronic versions. HERs were sent to customers deemed eligible for the CARE program according to the probability model, and to customers currently receiving the HER.

Sample Home Energy Report creative:

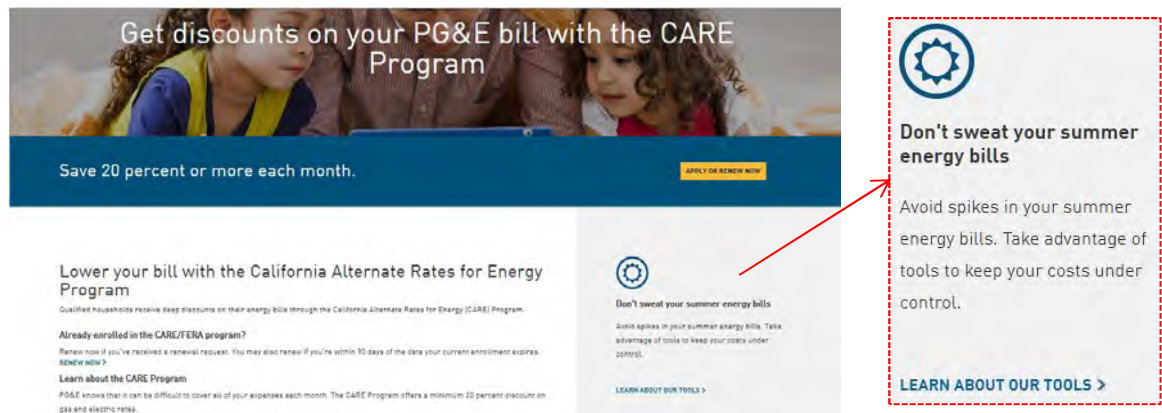


Throughout 2017, PG&E leveraged pge.com to engage with customers, highlighting information about programs tips and tools to support their energy management journey. During the Summer and Winter seasonal campaigns, the CARE landing page included a call out with a link to a landing page with energy saving tips and tools. Several times

throughout the year, the CARE program was featured as a module on the pge.com homepage.

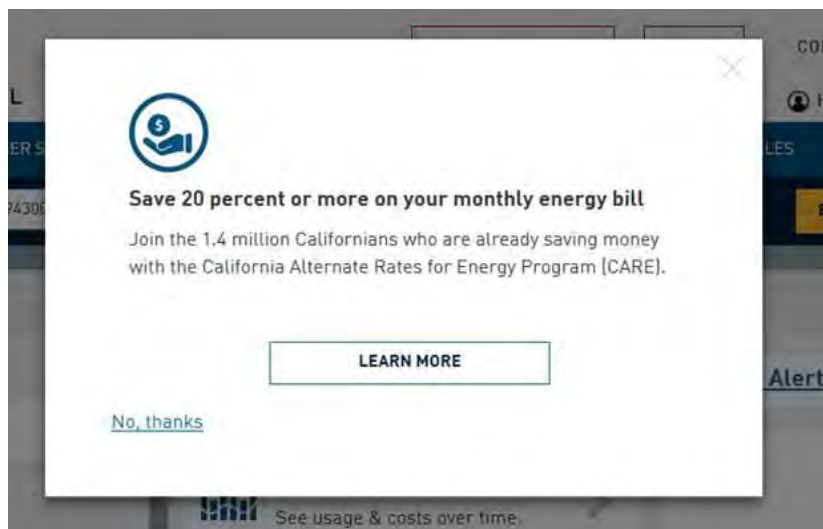
In December, PG&E launched the Your Account CARE interstitial. Customers with a CARE-eligibility flag, who have not enrolled in CARE, now see a pop-up window when they log into Your Account that encourages them to learn more about the program. The interstitials rotate between several messages, so the customer will not see the CARE message each time they log-in.

Sample CARE landing page callout:



The image shows a sample CARE landing page callout. The main banner features a photo of two children and the text: "Get discounts on your PG&E bill with the CARE Program" and "Save 20 percent or more each month." Below the banner, there is a section titled "Lower your bill with the California Alternate Rates for Energy Program" with details about enrollment and renewal. To the right, there is a sidebar with a callout box highlighted by a red dashed border. The callout box contains a gear icon and the text: "Don't sweat your summer energy bills", "Avoid spikes in your summer energy bills. Take advantage of tools to keep your costs under control.", and a link "LEARN ABOUT OUR TOOLS >". A red arrow points from the callout box to the sidebar.

CARE interstitial:



The image shows a CARE interstitial pop-up window. It features a gear icon with a dollar sign and the text: "Save 20 percent or more on your monthly energy bill", "Join the 1.4 million Californians who are already saving money with the California Alternate Rates for Energy Program (CARE).", and a "LEARN MORE" button. At the bottom left, there is a link "No, thanks". The background shows a blurred view of the PG&E website.

Broadcast Media Testing

In July 2017, the CARE outreach marketing team launched a campaign to test the impact of TV and radio on enrollment volume. The goal was to determine if TV and radio "lift" the overall response to other channels.

The test was structured to look at the impact of TV and radio separately, and then how they perform when combined. Designated market areas (DMAs) were selected for the campaign including San Francisco, Sacramento, and Fresno. Versions of the TV spots in English, Spanish and Chinese were aired in San Francisco and Fresno; radio spots in English and Spanish aired in Sacramento and Fresno.

The test ran from July – September, which coincided with significant marketing activity around the summer months. Post-campaign analysis showed that all markets that included TV, radio, or TV and radio, saw a lift in overall web traffic and enrollment volume. However, it was difficult to isolate the impact of the broadcast media from the influence of the Summer campaign activity. Additional testing is planned for 2018 to continue to measure the impact of TV and radio media.

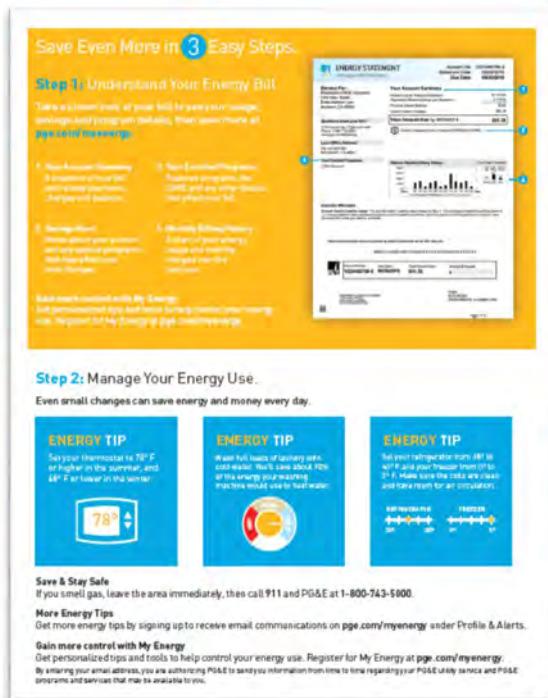
Retention Campaigns

Welcome Kit

In 2017, the PG&E outreach team continued the Welcome Kit communications to newly enrolled CARE customers. The Welcome Kit is designed to welcome customers into the CARE Program and provide them with a record of their CARE discount expiration date. In addition, the Welcome Kit highlights the significant savings that customers will see on their energy bills, helps customers understand how to read their energy bills and manage energy usage, learn about other energy savings tips, tools and programs, as well as inform them about important requirements for staying on the program. The Welcome Kit is sent monthly to new customers via mail or email.

In 2017, the email version of the CARE Welcome Kit saw improvement in key metrics, generating a 42% unique open rate (vs. 35% in 2016) and a 13% unique click-thru rate (vs. 11% in 2016).

Sample Welcome Kit creative:



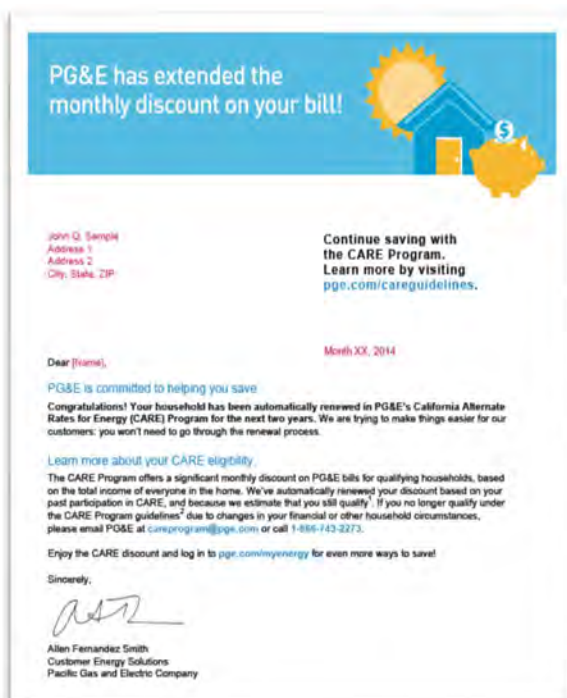


Auto-Recertify

In 2017, PG&E continued its ongoing monthly automatic recertification efforts for customers who were approaching their two-year program expiration and had been identified as most likely eligible according to the CARE probability model. Analysis of customers randomly selected for PEV shows that, on average, less than five percent of customers in deciles 1-2 of the model are proven to be ineligible.

PG&E sends direct mail and email to notify these customers of their automatic recertification and provides the opportunity to opt-out if they no longer qualify. The auto-recertification initiative helps reduce outreach and operational costs since these customers no longer need to receive separate recertification notices and go through the process of recertification. The auto-recertify email metrics were on par with 2016 results, with overall 30% unique open rate with a 2% unique click-thru rate.

Sample auto-recertify creative:

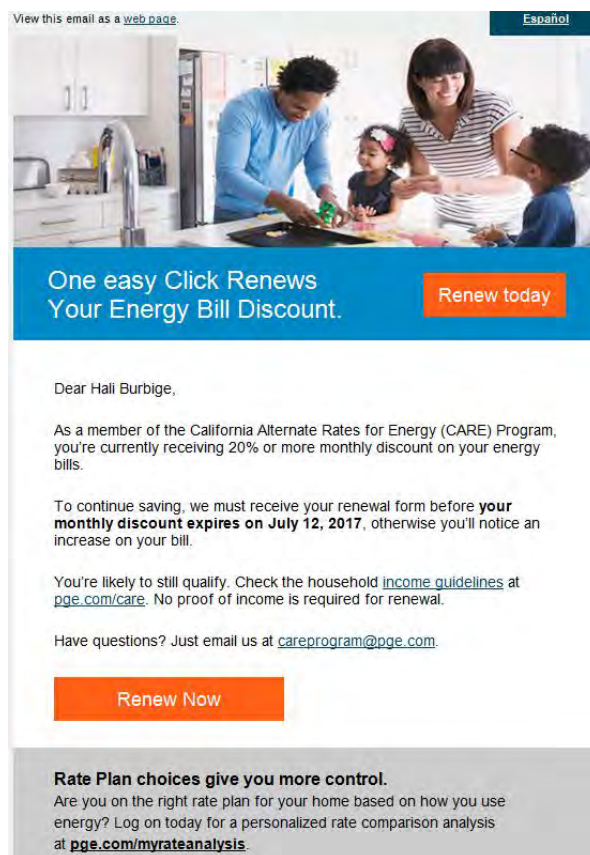


Recertification

For customers outside of deciles 1-2 and not automatically recertified through PG&E's auto-enroll initiative, PG&E sends notifications 120 days before customers' discount expires. This includes a direct mail package with a mail-in application and automated voice messages for those with landlines. To decrease the number of customers who fail to recertify, the PG&E outreach team sends additional email communications to complement the existing recertification process. Based on previous learnings, the PG&E outreach team learned that customers enroll at a higher rate when they receive multi-touch and multi-channel marketing communications. Recertification reminder emails were deployed to go out at 120-days, 90-days, 60-days, and 30-days prior to the customer's expiration date.

The recertification emails generated a 38% unique open rate and a 22% unique click-thru rate. The inclusion of the email reminders to the existing recertification process helps to maintain the failed to recertify rate at 16%.

Sample recertification creative:



Earned Media

As with other marketing channels, the PG&E communications team continued to garner exposure for low-income programs via participation in media interviews. PG&E aired segments across a variety of outlets to raise awareness for the CARE and ESA programs, and looked to target Spanish- and Chinese-speaking audiences in Fresno, Modesto, Sacramento and the San Francisco Bay Area.

Additionally, PG&E participated in television, radio and print interviews to promote the CARE and ESA Programs. Sample media outlets include:

- KFTV - Univision 21 daily morning show called *Arriba Valle Central* or *Wake up Central Valley*, which serves the Hispanic population in and around the Central Valley
- KXVS 92.1 FM - “The Voice of Stockton” is a non-profit community radio station. Sabor Latino a bilingual community program hosted by long time host Betty Ramirez airs Tuesdays.
- KSFO-FM *Servicio a la Comunidad*, Univision Radio, which serves the Hispanic population in the Fresno, Madera, Merced, Visalia, Tulare and King counties
- KCSO Telemundo 33 - Delivers news and information for Spanish Speaking viewers in Sacramento, Stockton, Modesto and throughout the Central Valley region.
- KFSO La Preciosa - Servicio a la Comunidad public affairs show airs twice on Sundays, with coverage in Stanislaus, Merced, Madera, Fresno, Tulare and Kings
- Radio Bilingue with coverage in Fresno, Modesto, Stockton, Bakersfield, Callexico, El Centro, Mendocino, Paso Robles counties
- KVTO-Sing Tao Radio, which offers programs in both Mandarin and Cantonese serving the Chinese population in the Bay Area
- KTSF-TV has been serving the San Francisco Bay Area Asian community since 1976. It is the only U.S. television station to broadcast nightly, live news programming in Cantonese and Mandarin.
- KFSN – News for Chinese radio is the only Chinese media in Northern California to have three separate print editions for the Peninsula, South Bay and East Bay Regions. 24-hour Mandarin Chinese radio station in the Bay Area. It covers SF, Alameda, Santa Clara, San Mateo, and other counties in the Bay Area.
- China Press, World Journal and Tsing Tao Daily, which serves the Chinese population throughout the Bay Area
- KCNS-Sino TV is a television station in South San Francisco that serves the San Francisco - Oakland - San Jose DMA. It is a full service television station, broadcasting on local digital UHF channel 39 and virtual channel 38. KCNS-Sino TV is operated by Multicultural Television, the largest Asian American owned media group in the U.S.

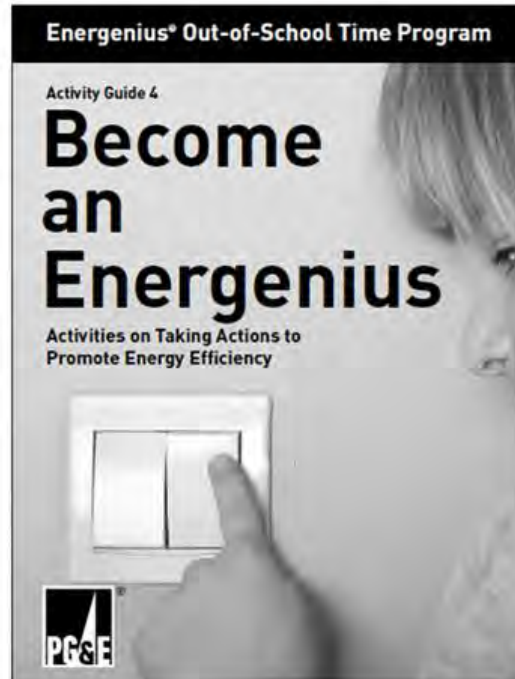
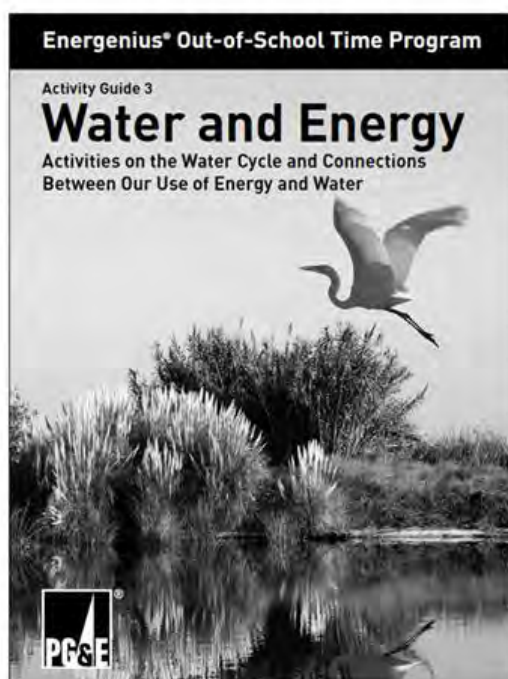
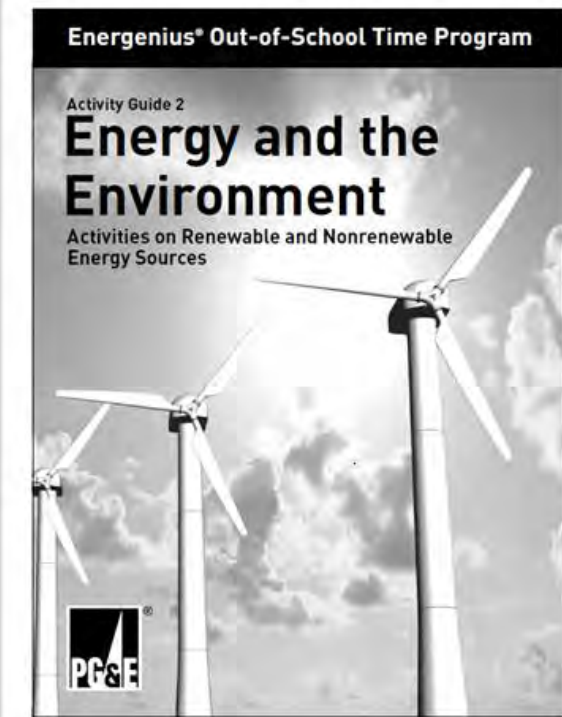
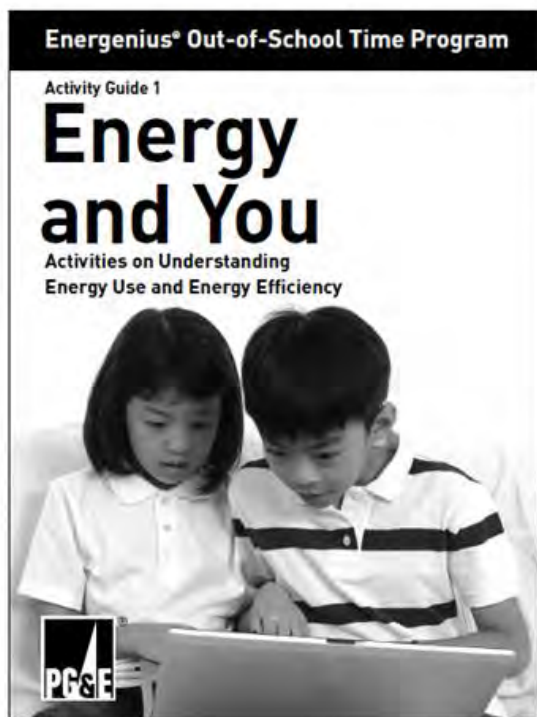
Community Engagement Outreach and Initiatives

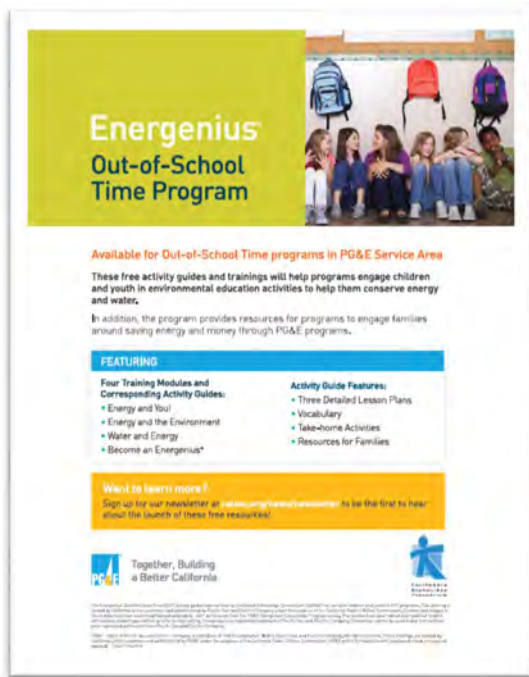
Out-of School Time (OST)

In 2017, the Community Engagement team continued its partnership with the California School Age Consortium (CalSAC) to promote PG&E’s Energenius® curriculum to out-of-school time (OST) field staff. The OST field staff CalSAC serves encompasses afterschool, school-age child care, school-based programs, summer learning, parks and recreation, YMCA’s, Boys and Girls Clubs, private programs, licensed family home care, and community based organizations. Not only do these programs provide safe places for children, they also help working families and employ members of the community. These programs also provide meaningful first time jobs and career pathways to teaching and other youth serving professions. In order to expand on these afterschool programs in hard-to-reach communities, PG&E and CalSAC collaborated to market the new Energenius® OST program in an effort to raise awareness about environmental stewardship and to increase access to PG&E services, like CARE and ESA, for low-income families.

Together with CalSAC, PG&E marketed four training modules and four activity guides for the following topics: Energy and You, Energy and the Environment, Water and Energy,

and Become an Energenius. These guides featured activities for afterschool educators and service providers to engage children and families in energy saving practices at school and at home. They were written in a way to engage youth and families through “take home” activities and challenges.





Outreach Method CalSAC actively promoted the Energenius® OST materials to its longstanding, statewide Trainer Network, which were primed for intensive professional development opportunities. Furthermore, in order to reach the highest volume of OST service providers, CalSAC partnered with Afterschool Regional Leads with County of Offices Education. The integral outreach for Community Engagement centered on alignment of OST needs:

- Environmental STEM curriculum
- Alignment to Common Core
- Family Engagement and free resources

Once PG&E and CalSAC implemented the strategy, the outreach channels included the following:

- Conferences:
 - Presented at the BOOST Conference, largest gathering of OST professionals in the state – April 19-21
 - Designed and facilitated a workshop around a vision for family engagement to ensure programs were centered at the heart of their strategy and families were provided relevant and timely resources.
 - 24 participants attended the workshop and received PG&E resources.
 - Presented at Region 5 RevUp Conference, the regional conference for Santa Clara, Monterey, Santa Cruz and San Benito Counties – Sept 9
 - Designed and facilitated a workshop around a vision for family engagement to ensure programs were centered at the heart of their strategy and families were provided relevant and timely resources.
 - 49 participants attended the workshop and received PG&E resources.
- Presentations:

- Tribes State and Federal Childcare Development Fund Quarterly Roundtable – July 27th
 - Connected with Tribal communities who implemented school-age care programs throughout California.
 - Enrolled a Tribal community in the family engagement project and went on to serve two of their sites with on-site training.
- Communications:
 - eCommunications:
 - CalSAC Monthly eNewsletter – Jan – Dec
 - Announcement of eLearning Modules – Jan 12
 - California Afterschool Network monthly eNewsletter
- Deployment of On-site Training
 - 14 agencies serving 22 sites requested and completed 53 on-site training modules. Each agency hosted one training across their multiple sites. 111 hours of training was delivered in total.
 - Approximately 453 training participants attended (based on the number of activity guides requested)
 - 225 family resource packets shared with agencies.
 - The organizations that participated in the trainings were from Regions, 1, 3, 4 and 6.



Region 1 Humboldt: Humboldt, Sonoma

Region 2 Butte: Glenn, Lassen, Modoc, Plumas, Shasta, Siskiyou, Tehama, Trinity

Region 3 Sacramento: Placer, Nevada, Colusa, Alpine, El Dorado, Sierra, Sutter, Yolo, Yuba

Region 4 Alameda: Contra Costa/San Francisco/Napa/San Mateo/Marin/Solano)

Region 5 Santa Clara: Santa Cruz, Monterey, San Benito

Region 6 Stanislaus: San Joaquin, Amador, Calaveras, Tuolumne

Region 7 Fresno: Kings, Madera, Mariposa, Merced, Tulare

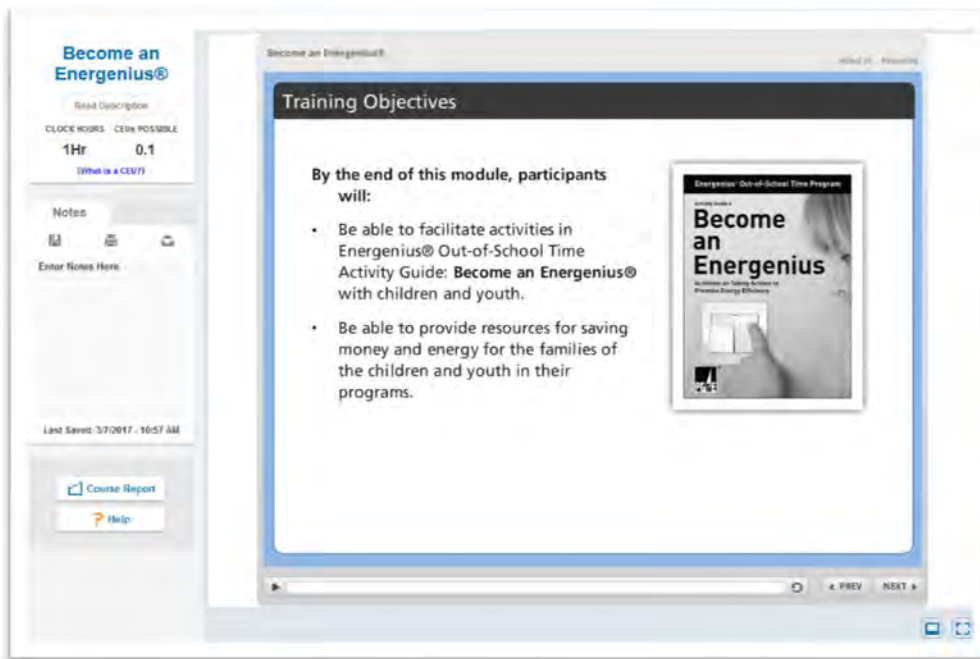
In addition to supporting a robust network of afterschool service providers, PG&E and CalSAC also developed a strategy to outreach to low-income families through Family Engagement. The Family Engagement concept centers around PG&E sponsoring events for the afterschool service providers for the purpose of inviting families to learn more about the energy awareness activities and customer assistance programs PG&E offers. Through these events, income-qualified families could specifically learn about CARE eligibility and enrollment. Below is some unsolicited positive feedback received regarding the Family Engagement events.

“Our parents were very eager to learn about resources available through PG&E. Families had the opportunity to stop by stations where student participants of the program guided

them through activities where they learned about energy conservation.” – Celia Cisneros, Merced County

“The facilitated think tank provided ideas for preplanning the culminating events to engage families in the project. Site Coordinators will continue to build on the shared ideas with site staff and collaborate with the school day program to move event planning forward. – Beryl Johnson, Nevada County

In an effort to further the accessibility of the Energenius® OST Program, PG&E worked with CalSAC in the fourth quarter of 2016 to make training available through interactive online modules. Starting in January 2017, distance or financial limitations to participating in the trainings was no longer a barrier to accessing the free curriculum. Below is a screenshot from the online module. To learn more, visit: https://calsac.org/e_learning/course_catalog



The overall results on trainings for Energenius® are as follows:

- 72 courses accessed
 - Energy and You! – 17
 - Energy and the Environment – 16
 - Water and Energy – 9
 - Become and Energenius® – 30
- 20 courses completed
- 36 individuals representing 36 agencies across 20 counties in California
- 1 individual representing an agency outside of CA

Online

- Activity guidebooks were first made available to download starting in April 2016. In 2017 64 activity guides were downloaded.

Family Engagement

- Over 589 families touched at family engagement events, which were executed in two ways to engage families and expand access to resources:

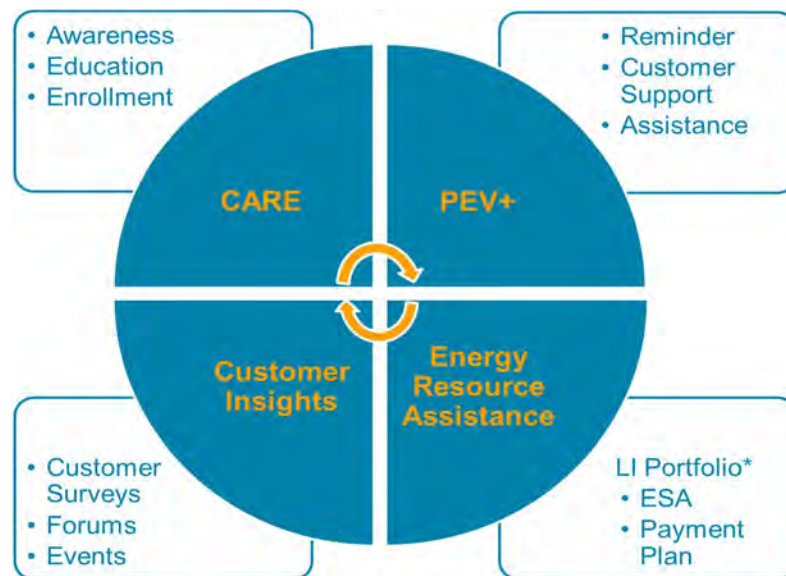
- Family Engagement event only: 2 sites from 2 agencies resulted in 29 families in attendance. Regions 7 and 10.
- Family Engagement Event, On-Site Training and Technical Assistance: 19 sites from 13 agencies resulted in 560 families in attendance. Regions 1, 3, 4 and 6.

CARE Enrollment

- In addition to the energy education, the Energenius OST efforts also helped PG&E enroll 173 customers onto CARE, whereby, 146 resulted as a new enrollment, an 84% new enrollment rate. This high new enrollment rate demonstrates that PG&E is positively penetrating a hard-to-reach community through the education space.

Community Ambassador Pilot

In 2017, PG&E continued the Community Ambassador Pilot Program (CA) that started in 2016. These CA organizations served as PG&E's "point of contact" resource for community engagement efforts and were designed to foster trust and connections through targeted community partnerships. Ambassadors were primarily responsible for educating residential customers about the California Alternate Rates for Energy Program (CARE) and the importance of its post enrollment verification (PEV) process. They provided CARE post-enrollment verification customers with personalized assistance to complete and submit documentation requirements to retain their discount. The graphic below describes how this pilot works in four key areas.



This pilot established a new standard for PG&E community partnerships. Community Ambassadors were equipped to deliver county-based customer support in hard-to-reach communities. They completed a comprehensive program training that included additional capacity building tools such as customer service skills, outreach best practices, and program knowledge on the full breadth of PG&E's Low Income Portfolio of programs and services. Community Ambassadors also supported hard to reach customers by staffing or hosting community events. Most importantly, Community Ambassadors focused on PEV assistance, ensuring customers were able to navigate through the PEV process and

submit the necessary documentation to retain the CARE discount. The pilot started by focusing on geographic areas, by county, that had high customer nonresponse rates to PEV notifications.

PG&E partnered with five nonprofit organizations that serve the following counties that have at least a 35% customer nonresponse rate to the CARE PEV notifications: Alameda, Marin, Monterey, Sacramento, San Benito, San Francisco, San Mateo, Santa Clara, and Santa Cruz.

- Enrolled over 312 new CARE customers in hard-to-reach communities
- Participated in at least 7 community events in diverse neighborhoods
- Delivered CARE PEV Assistance via 5 Community Ambassadors:
 - Contacted 7,985 customers
 - Generated 2,666 CBO-assisted CARE PEV completions, which maintained CARE customers' discount

Health Outreach Workers Initiative

Vision y Compromiso, a nonprofit organization supporting the Latino community, partnered with PG&E to deliver a culturally and linguistically specific outreach community engagement model that provides community-based health outreach workers with relevant training and support to increase Latino families' awareness of and enrollment in PG&E's low income portfolio of programs (primarily the CARE Program) while also enhancing families' energy education and energy savings. Ten health outreach workers helped PG&E reach out to strategic networks that promoted the penetration of low income programs through education. This outreach effort was focused in Alameda and Yolo counties in 2017. Outreach activities undertaken by this group included Spanish markets, churches, schools, Women Infant Children (WIC) offices and farm fields. Through this effort 23,506 customers were reached, 3,063 CARE applications were submitted, 1,340 ESA applications were received, and 1,345 customers enrolled to receive Spanish-language PG&E statements.

PG&E Customer Service Office Outreach Events

In 2017, PG&E Community Engagement (CE) staff participated in and supported 288 community and local PG&E Customer Service Office (CSO) outreach events to create awareness and provide education about the CARE Program. These outreach events were staffed by Customer Service Representatives (CSRs) helping customers with questions, understanding their accounts, and educating customers about CARE, ESA and assistance programs. CSRs provided information on Medical Baseline, Budget Billing, Large Print Bills, and In-Language Bills to give customers more information on our programs. This outreach effort resulted in over 23,487 customers receiving educational touches, 2,166 CARE applications submitted and processed as new CARE enrollments and 1,733 customers inquiring about Medical Baseline.

PG&E's CE team also partnered with ESA Program contractors to conduct outreach at PG&E community events. With contractors' help, this partnership resulted in making 2,010 customers aware of the ESA program. In addition, the CE Team partnered with ESA to set up ESA-only Lobby Assistance Days twice a month to promote the ESA program at the Customer Service Offices.

The CE Team also partnered with a Lifeline Phone Provider (Assurance) to provide CARE information that promotes the low income LifeLine Program. The Lifeline provider assisted customers at PG&E Local Customer Service Office outreach events throughout PG&E's service area.

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

Similar to 2016, online enrollment was the most effective outreach method in 2017. With 135,932 new online enrollments, this method produced the highest volume of CARE applications, while providing these applicants with an efficient and positive customer experience. With the application available in English, Spanish and Chinese on PG&E's website, customers enrolled using one of two options: completion of a simple form which requires no registration or via "My Energy," which requires user registration. Customers were able to enter the necessary household and income eligibility information, accept the declaration and submit the application electronically. This allowed customers to complete the process at their convenience and from their location of choice. All applications submitted electronically were received and processed quickly. Most 2017 outreach initiatives, including direct mail, email, and digital and print media, drove customers to the CARE website.

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

PG&E continued to leveraging the research conducted and incorporating those key insights into our marketing outreach campaigns. With the ultimate goal of increasing participation of households with a high propensity for eligibility, PG&E dedicated time to gain a deeper understanding of the low-income customer segment and their end-to-end experience with PG&E offerings, through qualitative and quantitative research. Key insights show that customers are generally:

- Overwhelmed by financial troubles and left with little time and energy to apply for help
- Unaware of full program benefits, including the magnitude of the CARE discount, leading them to believe that it may not be worth their effort
- Unclear about program eligibility and recertification criteria
- Suspicious of PG&E's motives for discounting their bill
- Fearful that PG&E will share their information with government agencies, particularly with the Immigration and Naturalization Service
- Discouraged by the formal tone and confused by onerous outreach materials and forms
- Changing political climate adds additional barriers, especially to hard to reach communities

The insights gathered helped PG&E enhances outreach efforts, develop mitigation tactics to enrollment barriers and better serve low income customers through:

- A multi-channel, multi-touch outreach approach that included automated calls, direct mail and email, as well as digital advertising
- Simplified messaging and design; use of iconography and step-by-step, color-aided instructions
- More enticing headers and subject lines, as well as outer envelope messaging
- Clarified qualification criteria, documentation needed and timing; increased urgency to comply
- A more empathetic and friendlier tone
- Mention of simplicity and ease of application, savings potential and confidentiality of the information shared

- Mention of how quickly and where they will see savings on their bill
- Added function to share details with potentially eligible friends and family
- Optimized tracking and measuring mechanisms

Though language did not pose a significant barrier to CARE enrollment in 2017, PG&E recognizes the diversity of customers in its service area and continues to offer CARE materials and services in multiple languages, including English, Spanish, Chinese, Korean, Tagalog, Hmong, Russian and Vietnamese.

A barrier to the health outreach worker CARE initiative conducted by Vision y Compromiso (discussed in Section 2.4.1), was trust. Many people in the Latino community served by Vision y Compromiso have been misled by individuals and companies who use PG&E's name in an unauthorized manner committing fraud. These previous acts contributed to confusion and a lack of trust among customers when the health outreach workers were trying to work with customers to fill out and complete a CARE application. As a result, a longer process of engagement by the health outreach workers to re-educate families about PG&E and their low income portfolio of offerings (including CARE) was needed. Many customers were hesitant to share personal information to individuals who did not show them a PG&E credential. However, the Vision y Compromiso health outreach workers listened to these families, taking it as an opportunity to increase their understanding about customers' experiences in order to improve their assistance to future PG&E customers.

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

A small geographic location of PG&E's service area is shared with other investor owned or municipal utilities. Due to more stringent information security requirements, PG&E is in the process of updating automatic enrollment agreements with SCG, SCE, and Sacramento Municipal Utility District to exchange listings of enrolled CARE customers that are identified in the shared service areas.

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

A database of CARE customer contact information is uploaded for weekly distribution to PG&E's ESA Program providers to use for their outreach. Since November 1, 2005, when the ESA and CARE income guidelines were aligned at 200 percent of the Federal Poverty Guidelines, CARE automatically enrolls customers who have participated in the ESA Program.

Since the CARE discount is noted in the customer information system, Customer Service Representatives (CSR) are able to see the CARE status of any customer calling PG&E's contact centers for assistance. This provides important information for CSRs to use when discussing other benefits and services that may be of assistance to the income qualified customer.

CARE features other financial assistance information on its applications. Each CARE application provides a brief description of other assistance programs available as well as contact numbers.

PG&E's CARE program integrated with other PG&E assistance programs to generate enrollments. CARE applications are on display and available to visitors at Cooling Centers. PG&E provides the CHANGES program contractors with training and collateral to help limited English-proficient customers enroll in CARE and other assistance programs. PG&E conducts monthly data exchanges with the ESA Program to automatically enroll eligible customers in CARE. PG&E also runs monthly reports of customers receiving bill payments received through the Department of Community Services and Development's (CSD) Low Income Home Energy Assistance Program (LIHEAP) and PG&E's Relief for Energy Assistance through Community Help (REACH) programs and automatically enrolled eligible customers in CARE. These efforts resulted in 16,314 new enrollments.

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

Throughout 2017, PG&E targeted existing CARE customers for outreach related to the ESA Program. Because existing CARE customers were likely to qualify for the ESA Program based on their income level, this was a way to ensure that the customer qualified via income guidelines. Other filters were then applied to determine those customers who would be most eligible for the ESA Program.

Additionally, PG&E leveraged our Integrated Programs Brochure that integrates key low income programs, services and savings tips in a step-by-step, easy-to-understand and succinct manner, which is available in seven languages.

PG&E automatically enrolls customers who receive LIHEAP and REACH assistance onto the CARE Program. Furthermore, for the CARE Automated Phone Calls, PG&E integrates information about the Family Electric Rate Assistance (FERA) and ESA Programs. 12,450 ESA Program participants were enrolled in the CARE Program in 2017.

Additionally, PG&E continues to coordinate CARE, ESA and other low income outreach efforts to provide likely eligible customers with the knowledge and tools to access PG&E's services. Recent examples include an updated brochure that integrates key low income programs, services and savings tips in a step-by-step, easy-to-understand and succinct manner that is available in seven languages. The goal with these and similar efforts moving forward is to help financially challenged customers manage their energy bills in a more holistic and sustainable way.

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

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

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

To improve the cost-effectiveness of outreach and enrollment services, PG&E focused on:

- Optimizing our targeting strategies with the goal of enrolling truly eligible customers
- Optimizing the multi-touch, multi-channel customer contact strategy with a three-touch strategy
- Using more cost-effective outreach channels, such as automated phone calls and email
- Driving customers to the online enrollment form for quicker processing and lower operational costs
- Testing different messaging and creative versions in market (as opposed to commissioning additional research), identifying quick enhancement opportunities and implementing learnings in real time for optimized results
- Automatically recertifying customers who are most likely qualified and fall within deciles 1-2 of the CARE Probability Model
- Developing more communications 30 days prior to customers falling off the program to improve customer experience and reduce operational and outreach costs

2.5. Processing CARE Applications

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

D.08-11-031, OP 100 authorized PG&E to change the certification period for sub-metered tenants from one year to two years. PG&E mails the recertification package to sub-metered tenants 90 days prior to their CARE expiration date. A reminder letter is also mailed 30 days prior to their CARE expiration date. Tenants are removed from the CARE rate if they do not respond by their due date.

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

PG&E contracted with a third-party vendor - Genesys - to conduct automated calls to recertify eligible customers.

PG&E also contracted with a third-party vendor--Kern USA--to: 1) pick up the CARE mail at PG&E facility, 2) open, sort, capturing all data fields on the application, redact sensitive customer information and scan all applications and documents into the EDGeline workflow system (this occurs at Kern facility). Applications and documents uploaded in the EDGeline workload system were then assigned to CARE processors to be reviewed and approved.

2.6. Program Management

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

The enactment of Assembly Bill (AB) 327 in the Fall of 2013 established that the CARE electric discount be no less than 30 percent and no greater than 35 percent of revenue. Rate changes associated with AB327 began in August 2014 and will continue in phases through 2018. Rate increases are expected to impact CARE customers disproportionately, significantly affecting program management through increased questions and complaints about higher bills. PG&E is addressing this issue through its Residential Rate Reform outreach. The outreach strategies include helping customers to understand the changes that will impact their current rates and that PG&E has programs, tips, and tools available to help, including new Time of Use rate plans. PG&E is working in our communities to communicate changes and available programs through customer service office events, community based organizations, and community engagement. PG&E is encouraging customers to utilize the resources available to them online at pge.com and MyEnergy.

The Mobile Home Park (MHP) Utility Upgrade Program affected program management of sub-metered accounts in a positive way. Started in 2015, the MHP program is a voluntary pilot program that is aimed at replacing existing MHP gas and electric facilities with new direct utility service. Qualified and selected applicants will have their privately owned master meter/sub-metered utility system replaced with new PG&E owned systems that will deliver energy directly to park residents. The program goal is to upgrade 10% of the 381,000 eligible MHP spaces over the next 3 years. This program will provide residents with safer and more reliable services; relieve owners from maintaining an aging system; and provide solutions to the some of the problems the CARE program encountered during 2017 while administering the program for sub-metered tenants and master-meter customers, as reported in Section 2.1.7 above.

The State Controller's Office (SCO), through an Interagency Agreement (No. 15IA5003) with the California Public Utilities Commission (PUC), conducted an audit of PG&E's CARE Program for the period of January 1, 2013 through December 31, 2015. The audit began in June 2016 and concluded in January 2017. PG&E received a draft report in October 2017 and provided response to the draft report in November 2017. PG&E anticipated receiving a final report in 2018.

PG&E filed its ESA and CARE Programs and Budget Application for 2015-2017 program years on November 18, 2014. The Commission issued Decision 16-11-022 on November 21, 2016 approved PG&E's Application and sets forth the parameters for the administration and participation in the CARE Program and ESA Program for Program Year (PY) 2017-2020.

Both the High Usage and Standard CARE Post Enrollment Verification (PEV) Processes continued to affect CARE program management significantly in 2017. These processes and their impacts on program management are discussed below.

As ordered in D.16-11-022, PG&E successfully developed new functions and enhanced existing functions in Your Account that allowed customers to complete their Certification, Recertification and PEV processes online by December 2017. Customers could access, view their information, and complete these processes in Your Account via mobile browser or device.

As ordered in CPUC Resolution M-4833, PG&E has implemented a post-enrollment verification (PEV) freeze in the counties impacted by the California wildfires for Q4 2017. The freeze includes not removing customers who are already in the PEV process, as well as not sending new PEV requests. Per the Resolution, PG&E plans to extend the freeze until November 9, 2018 for customers in areas impacted by the California wildfires.

High Usage Post Enrollment Verification (PEV) Process

PG&E continued the High Usage PEV process in 2017. CARE customers with usage above 400% of baseline in the previously monthly billing cycle were selected to complete the PEV documentation requirements.

Stage 1 – Income Verification and ESA Agreement

- Provide an IRS Tax Return Transcript or Verification of Non-Filing
- Agree to participate in the Energy Savings Assistance Program

Stage 2 – ESA Participation

- Complete participation in the Energy Savings Assistance Program – allow contractor and inspector access to all portions of metered property
- Notice to reduce and/or maintain the usage below 600% of baseline within 90 days

Stage 3 – Usage Monitoring / Appeal Process

- Maintain usage below 600% of baseline, or be removed from CARE
- Customers removed from CARE are blocked from re-enrolling for two years
 - Removed customers can file an expedited appeal with PG&E to prove usage is “necessary, basic, and legitimate”

In compliance with D.16-11-022, OP 87, the IOUs have developed a document aligning their CARE High Usage Appeal Processes and will use the same criteria and evaluation of customer appeals going forward. PG&E’s High Usage PEV results for 2017 are reported in CARE Table 13.

Standard PEV Process

PG&E implemented its Long Term Model for PEV selection in March 2014 (OP 89). PG&E’s 2017 annual PEV rate was nearly six percent (3 percent high usage + 2 percent model + 1 percent random selection), and applied to all enrolled CARE customers (OP 91).

The table below shows a breakdown of the 2017 Standard PEV results by enrollment type (OP 94d-e).

2017 PEV Results by Enrollment Type		
Status ¹	Income	Categorical
Approved	37.7%	41.6%
Over Income	4.7%	3.2%
Request Drop	1.7%	1.4%
No Response	55.9%	53.8%
¹ Status as of March 31, 2018.		

PG&E's overall 2017 PEV results are reported in CARE Tables 3A (Model) and 3B (High Usage) (OP 94a-c).

Significant PEV improvements have been gained with the implementation of the CARE Probability Model and high usage requirements. Customers selected for PEV by the model (scores in deciles 9 and 10) are 75 percent more likely than those randomly selected to be verified as ineligible (deemed over income or requested removal from the program) (OP 94f).

The Long Term Model framework, including optimal PEV rate, was proposed in AL 3410-G/4279-E filed on September 3, 2013 (OP 95), and approved by Energy Division effective October 3, 2013. The Long Term Model was implemented in Q1 2014 and remained in effect throughout 2017. The Long Term Model is designed to overlook potential non-responders who look eligible through their PG&E transactions, but are also likely to not respond to the PEV request. This is achieved by an algorithm that looks at the degree to which third-party data overlays are missing, indicating a customer has short tenure and may be more transient and less established. The end result is that the model targets customers for PEV who are likely ineligible and would be denied, regardless of likelihood to respond. The Standard PEV non-response rate of customers selected by the model has decreased as a result of this enhancement.

The CARE subsidy was \$644 million in 2017. This is a 17 percent decrease from the highest annual CARE subsidy of \$776 million in 2011. The high usage requirements and Long Term Model will continue to be instrumental in identifying customers who are likely not qualified, thus reducing the subsidy, while maintaining ease of enrollment for the vast majority of customers who are truly in need of the discount.

Green Tariff Shared Renewables (GTSR) Reporting

D.16-11-022, Ordering Paragraph 126 required “Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company shall make the California Alternate Rates for Energy (CARE) discount available to customers enrolled in the Green Tariff Shared Renewables (GTSR) rate structures, as described in this decision. The utilities shall include in their annual reports the number the number and percentage of customers in the GTSR and Enhanced Community Renewables rate structures and the average total bill discount that CARE Program enrolled GTSR and Enhanced Community Renewables customers receive (in percentage terms) from the CARE Program discount on the distribution portion of their bill. In the event that average bill discounts for CARE Program/GTSR and Enhanced Community Renewables customers are reported to be below the 30% overall CARE Program discount threshold.” The similar paragraph on page 338 continues: “this policy may be revisited and utilities may file in its mid-cycle update Advice Letter to apply the CARE discount to CARE-eligible GTSR customers with the goal of a 30% discount threshold.”

There were 235 CARE-enrolled customers in PG&E’s Solar Choice program as of the end of 2017, representing less than 0.02% of total CARE customers. The Enhanced Community Renewables portion of the GTSR Program does not yet have any active projects, so there are no CARE or other customers enrolled in that program at this time.

The average total bill discount that CARE-enrolled Solar Choice customers received on their bill from the CARE Program discount was 33.9%.

California LifeLine Reporting

D.16-11-022, Ordering Paragraph 88 directed PG&E to: 1) distribute CARE and ESA program marketing material to the California LifeLine administrator or providers, stores and kiosks; 2) assess each California LifeLine service provider’s willingness and administrative viability to participate in the CARE Capitation Program and can enroll all willing and qualified vendors, including California LifeLine providers, in the CARE Capitation Program; 3) this directive includes Veterans Affairs Supportive Housing program partners, IRS Volunteer Income Tax Assistance providers and Covered California outreach and enrollment agencies; 4) enrollments driven through these efforts should be tracked (through unique CARE Program and ESA Program URLs, toll-free numbers, or other methods) and reported in the annual CARE Program and ESA Program reports.

These activities did not begin in 2017 while PG&E awaited clarification and resolution of PFM issues. PG&E will begin these activities in 2018.

Statewide Request for Proposal (RFP) concerning Advanced Metering Infrastructure Data

D.16-11-022 issued on November 10, 2016 directed Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company to conduct a statewide Request for Proposal (RFP) concerning Advanced Metering Infrastructure Data by June 1, 2017.

The statewide RFP was not issued in 2017 while PG&E awaited clarification and resolution of PFM issues. Per D.17-12-009 issued on December 14, 2017 that modified D.16-11-022, the due date to conduct a statewide RFP was revised from June 1, 2017 to March 31, 2018.

2.7. Pilots

2.7.1. Community Help and Awareness of Natural Gas and Electricity Services (CHANGES)

The Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) Pilot Program provides funding to community based organizations (CBOs) to assist Limited English Proficient (LEP) customers with energy education and billing issues.

D.12-12-011 approved continued funding of the CHANGES Pilot Program through the CARE Outreach budget until the end of 2014. D.14-08-030 authorized a CHANGES budget until the end of 2016, a 2% increase from the authorized 2014 CHANGES funding level. D.15-12-047, CHANGES established itself as an ongoing statewide program, funded as a reimbursement from the CARE Program until a long-term Commission funding source can be established through budgetary and/or legislative channels. D.16-11-022, issued on November 21, 2016, authorized continued funding for CHANGES program through the 2017-2020 CARE Program budget. Due to the delays in starting the new contract for CHANGES program, the required independent, third-party evaluation study of the ongoing CHANGES program has been extended from June 2017 to June 30, 2018.

The CHANGES Pilot Program maintained reporting procedures for PG&E and other investor-owned utilities to report expenditures, and evaluate individual cases and group workshops/presentations conducted by community based organizations. The reporting requirements were included in CARE Tables 9, 10 and 11 in the monthly filed ESA/CARE reports.

In 2017, the CHANGES program continued to provide outreach, education, and bill issue assistance on natural gas and electricity bills and services to LEP customers in the language of their choice through a statewide network of community-based organizations. The IOUs continued to work with CHANGES implementers to maintain reporting procedures to evaluate individual cases and group workshops/presentations conducted by CBOs in compliance with D.12-12-011 and D.12-08-044. CHANGES data pertaining to program expenditures, one-on-one and group customer assistance sessions is collected from the CBOs and reported in the monthly CARE/ESA report in CARE Tables 9, 10 and 11.

In addition, in 2017, CHANGES CBOs continued to assist LEP customers on a variety of issues, including: helping customers enroll in the CARE and ESA Programs, providing energy efficiency education and bill education, setting up a PG&E account/payment plan, obtaining LI HEAP assistance and help with avoiding service disconnection. While PG&E Customer Service Representatives (CSRs) provide in-language support through its Contact Centers' third party affiliates, the CHANGES Program provided LEP customers with an alternative to getting help with their PG&E billing issues through local, trusted CBOs.

The CPUC's Consumer Service Information Division (CSID) and PG&E have been working together to improve the coordination between CHANGES CBOs and PG&E customer service. In 2014, in coordination with CSID, PG&E modified its customer authorization form (79-1095) to enable a CHANGES CBO representative to speak directly to PG&E CSRs to review a customer's energy bills and set up a payment plan on a

customer's behalf. In 2017, PG&E continued the use of this authorization form. In addition, in 2015, to comply with consumer privacy rules and support CHANGES CBOs and their clients, PG&E updated its Customer Operations policies to allow verbal authorization from a customer to discuss their account information with a CHANGES CBO representative. This verbal authorization is only allowed if the customer is asking a CBO representative to communicate on their behalf with a PG&E representative. The verbal authorization is only good for that one phone call. PG&E continued this verbal authorization in 2017.

In response to CHANGES CBOs and CPUC constructive feedback on the CHANGES Toll Free Line experience, PG&E updated its routing system to connect CHANGES CBOs to PG&E Senior Service Representatives (SSRs). The streamlined approach to connect CHANGES CBOs to trained SSRs helped establish recognition of CHANGES CBO's purpose and be more responsive to customers' time-sensitive energy billing/service needs.

3. CARE Expansion Program

3.1. Participant Information

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

See CARE-Table 12 – CARE Expansion Program.

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

There were approximately 104,613 tenants residing within CARE Expansion Program qualified facilities receiving the CARE discount by December 31, 2017. This information is not available by energy source. The resulting numbers were representative of the total number of residents housed in all facilities, both residential and commercial, and for both energy commodities.

3.2. Usage Information

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

See CARE-Table 12 – CARE Expansion Program.

3.3. Program Costs

3.3.1. Administrative Cost (Show the CARE Expansion Program's administrative cost by category)

The CARE Expansion program's administrative cost was reported as part of the overall program administrative expenses. See CARE-Table 1 – Overall Program Expenses.

3.3.1.1. Discount Information

Following is the total annual discount, by energy source, for the CARE Expansion Program:

Electric:	\$7,104,906
Gas:	\$1,248,162
Total:	\$8,353,068

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

Electric:	\$561.00
Gas:	\$147.60

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

Electric:	\$6,205.18
Gas:	\$1,587.07

3.4. Outreach

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

In 2017, PG&E continued to use the CARE Program website as a useful source of information for nonprofit, agricultural, and migrant farm workers. As new program information and income guidelines became available, applications were updated online in formats that allowed for easy download and printing. PG&E did not work with third parties to perform outreach for the CARE Expansion Program.

3.4.2. Discuss each of the following:

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

Downloading and printing of the nonprofit group living facility online application has become the most effective outreach method for nonprofit organizations seeking financial assistance. In addition, PG&E is available via telephone or e-mail to address any questions pertaining to their eligibility and account information.

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

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

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

The certification period for nonprofit group living facilities is two years. At the end of the 2-year period, PG&E mails a recertification packet to the listed primary contact. Due to an organization's frequent personnel changes, current staff is not always aware of the CARE Program or the recertification process. As a result, approximately half of the organizations do not recertify though they still qualify for the discount. To address this barrier, PG&E proactively calls customers to remind them to recertify, answer any questions they might have and guide them through the recertification enrollment process.

For the agricultural employee housing facilities, the barriers are the lack of understanding the CARE Program criteria and the perception of inconvenient paperwork. Some of the barriers included facility owners and managers who are unsure about the type of permit requirements; some believe their facility would not qualify because the company was a business, or the tenants do not pay for utilities and/or tenants do not live in the housing

facility year round. PG&E overcame these barriers by working one-on-one with the facility owners and managers to ensure they were successfully enrolled.

Some managers were confused by the change of eligibility criteria: the total gross income for all residents and or household s occupying the facility at any given time must meet the current CARE income eligibility guidelines. Previously, each household income occupying the facility at any given time had to meet the current CARE income eligibility guidelines.

PG&E continued to receive phone calls asking for clarification about the definition of a Satellite Facility. PG&E also received calls asking for clarification about the requirement whether non-profit facilities such as homeless shelters, hospices, and women's shelters must be open for operation with at least six beds or six occupants for a minimum of 180 days and/or nights per year at each facility's service address. Based on customers' on-going feedbacks, PG&E revised its Non-Profit application to provide more clarification on requirements and worked with facility owners and managers to answer each of their questions.

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

PG&E continued to reach out to agricultural facilities and implemented a targeted approach to those facilities not currently enrolled in the CARE Program. Additionally, the CARE application is available online for interested organizations to apply which reduced printing and mailing costs.

3.5. Program Management

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

PG&E did not encounter any issues and/or events that significantly affected the CARE expansion program management in 2017.

4. Fund Shifting

4.1.1. Report ESA Program fund shifting activity that falls within rules laid out in Section 6.2 of D.12-08-044.

The ESA total program expenses in 2017 did not exceed the total authorized budget. In compliance with D.12-08-044 (wherein the “Utilities are permitted to shift funds from one year to another within the 2012-2014 cycle without prior approval”) and D.17-12-009, PG&E fund shifted among energy efficiency subcategories to cover the overspend in the HVAC-electric, Appliance-electric, and Implementation-electric subcategories totaling \$3,814,992.

PG&E also carried over \$5,159 from 2016 in the “CPUC Energy Division” subcategory to cover an overspend due to \$6,035.84 of invoices for PY2016 being recorded in 2017; these invoices were received in June 2017 after the PY2016 annual report was filed. An advice letter to shift these funds from 2016 to 2017 will be filed.

ESA-Table 12 shows:

- the fund-shift from Lighting-electric to HVAC-electric, to cover the overspend of \$2,164,799
- the fund-shift from Lighting-electric to Appliance-electric, to cover the overspend of \$1,320,704
- the fund-shift from Lighting-electric to Implementation-electric, to cover the overspend of \$329,490
- the carry forward of \$2,683-electric and \$2,476-gas (total of \$5,159) from 2016 CPUC Energy Division to cover the overspend in 2017 CPUC Energy Division

4.1.2. Report CARE fund shifting activity that falls within rules laid out in Section 6.2 of D.12-08-044.

D.12 08 04, OP 135(c) of 4, authorized CARE fund shifting between categories in the same manner as the 2009-2011 budget cycle. PG&E did not fund shifting between budget categories in 2017 as the total CARE administrative expenses did not exceed the overall authorized budget.

4.1.3. Was there any ESA Program or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 6.2 of D.12-08-044?

There was no ESA or CARE Program fund shifting activity that occurred in 2017 that fell outside of the fund shifting guidelines in D.12-08-044, as updated in D.16-11-022 and D.17-12-009.

5. Commonly Used Acronyms

CARE	California Alternate Rates for Energy
CBO	Community-Based Organization
CFL	Compact Fluorescent Lamp
CPUC	California Public Utilities Commission
CSI	California Solar Initiative
D.	Decision
CEESP	California Energy Efficiency Strategic Plan
CSD	California Department of Community Services & Development
DDTP	Deaf and Disabled Telecommunications Program
DRP	Demand Response Program
DSM	Demand Side Management
EE	Energy Efficiency
ESA	Energy Savings Assistance
FERA	Family Electric Rate Assistance
HEAT	Home Energy Assistance Tracking
IHD	In Home Display
IOU	Investor-Owned Utility
kW	Kilowatt
kWh	Kilowatt Hour
LIEE	Low Income Energy Efficiency
LIHEAP	Low Income Home Energy Assistance Program
LIWP	Low Income Weatherization Program
MID	Modesto Irrigation District
MIDI	Moderate Income Direct Install
MOU	Memorandum of Understanding
MUP	Multifamily Upgrade Program
mW	Megawatt
mWh	Megawatt Hour
NGAT	Natural Gas Appliance Testing
OP	Ordering Paragraph
OBF	On-Bill Financing
PCT	Programmable Communicating Thermostat
PEV	Post Enrollment Verification
PFM	Petition for Modification
PG&E	Pacific Gas & Electric Company

PPP	Public Purpose Program
PY	Program Year
RFP	Request for Proposals
SCE	Southern California Edison
SDG&E	San Diego Gas & Electric Company
SoCalGas	Southern California Gas Company
SSI	Supplemental Security Income
SSD	Supplemental Security Disability
SSP	Social Security Pension
TDD	Telecommunications Device for the Deaf
TID	Turlock Irrigation District
TRC	Total Resource Cost Test
UC	Utility Costs
WFTP	Willingness and Feasibility To Participate

6. Appendix A: 2017 ESA and CARE Program Compliance and Activities

2017 ESA-CARE Program Activities and Compliance					
No	ESA-CARE Activity	CPUC Directive	Directive Reference	Action Required	Complete Date
1	PG&E added Tier 2 Smart Power Strips in 2017 to replto supplement Tier 1 Smart Strips.	D.16-11-022	OP 20	20. San Diego Gas & Electric Company, Southern California Edison Company and Pacific Gas and Electric Company shall add the Smart Strip Tier 2 measure to replace the older version of Smart Strips currently offered.	1/3/2017
2	SDG&E submitted a proposed schedule and workplan on behalf of the Cost Effectiveness Working Group to the low income proceeding service list on 1/11/2017.	D.16-11-022	OP 56	56. The Energy Savings Assistance (ESA) Program Cost Effectiveness Working Group (ESACET Working Group) shall submit a proposed schedule and work plan to the low income proceeding service list no later than 60 days after the date this Decision is approved. This plan will identify interim milestones and deadlines for the ESACET Working Group to finalize recommendations to inform the next program cycle. The final recommendations shall identify: (1) Which measures should be included and excluded from the Adjusted ESA Program Cost Effectiveness Test calculation; (2) how to appropriately allocate administrative costs and non energy benefits across program measures; and (3) to the extent available, how revised non energy benefits values should be incorporated into the Adjusted ESA Program Cost Effectiveness Test.	1/11/2017
3	PG&E transferred the first of 2 annual \$1,750,000 payments to MCE for its LIFT Pilot by January 15, 2017.	D.16-11-022	OP 147	147. Marin Clean Energy's LIFT Proposal pilot is approved, in part. The total budget authorized for the pilot is \$3.5 million. The pilot is for 2 years and D.16-11-022 authorizes an annualized payment; \$1,750,000 by Jan 15, 2017 and 2018. To implement the pilot, Marin Clean Energy shall file an Advice Letter with the Commission's Energy Division regarding metrics for program tracking. Pacific Gas and Electric Company shall transfer MCE's annualized ESA Program budget by January 15 of each year. Marin Clean Energy may seek additional funding for future program years after the completion of its pilot via a Petition for Modification (if it is within this program cycle).	1/13/2017
4	PG&E updated HE Furnace measure assumptions based on SCG's HE Furnace energy savings and unit costs, and used these values to revise the 2015-2017 ESA Program Application TRC model, i.e. using 2015-2017 ESA Program budgets and measures assumptions. PG&E updated our 2017-2020 ESA Program budgets and measures based on D.16-11-022 directives. These D.16-11-022 ESA Program budgets were filed in our Conforming Advice Letter on April 3, 2017. The HE Furnace analysis using the 2017-2020 ESA Program budgets was updated at that time.	D.16-11-022	OP 16	16. Pacific Gas and Electric Company (PG&E) and San Diego Gas & Electric Company (SDG&E) shall re run the measure Total Resource Cost cost effectiveness test using the 65% Annual Fuel Utilization Efficiency baseline, as used by Southern California Gas Company and Southern California Edison Company to determine if the High Efficiency furnace proves more cost effective as compared to the existing Forced Air Unit furnace currently offered. The results of these calculations, along with supporting documentation, shall be sent to the service list within 60 days of this Decision. If the score is higher than the lower efficiency furnaces that the Energy Savings Assistance (ESA) Program currently provides, PG&E and SDG&E must provide this measure instead of the standard furnaces. If it is determined that the measure is cost effective, PG&E and SDG&E must propose to add this measure mid-cycle, along with cost effectiveness documentation and a budget proposal, via the mid-cycle update Advice Letter. The Commission expects that any collections that might ordinarily be required for any additional funding will be mitigated or rendered unnecessary through the application of unspent 2009 2015 ESA Program funds.	1/20/2017
5	PG&E included CHANGES reporting in its Monthly Reports in 2017.	D.15-12-047	OP 28	Pacific Gas and Electric Company, Southern California Edison, Southern California Gas Company, and San Diego Gas & Electric Company shall include the Community Help and Awareness of Natural Gas and Electricity Services bill issue assistance and education workshop materials and attendance statistics in their monthly CARE reports until long-term funding is established from the Commission's budget.	1/23/2017
6	PG&E adjusted its budget and included it in CARE Table 1 starting with the January 2017 Monthly Report.	D.16-11-022	OP 129	129. The California Alternate Rates for Energy Program Administrative Budget funding the Community Help and Awareness of Natural Gas and Electricity Services ongoing program is adjusted from \$61,200 per month to \$145,834 per month, with the following contribution from each of the large Investor Owned Utilities: a) Pacific Gas and Electric Company, 30%;	1/30/2017
7	True-up between bridge funding and the final Decision for this proceeding was handled through the 2018 AET/AGT advice filing process.	D.16-06-018	OP6	PG&E shall address any under-/over-collection that results from authorized program spending level increases or decreases as a result of a final decision in Application A.14-11-010 and in each of the IOUs' gas PPPSurcharge, electric PPP mechanisms, and/or currently authorized ratemaking procedures.	2/1/2017
8	Applicable balancing accounts for the ESA Program are the PPPLIBA, PPPRAM and PPP-LIEE. For the CARE Program they are CAREA and PPP-CARE. This will be addressed in the RAD for the new Decision D.16-11-022 that will be done for the 2017 January close.	D.16-06-018	OP7	PG&E shall continue to track, in the existing memorandum accounts (specify the accounts) the difference between the revenue requirement adopted in this decision and that requested in their pending applications commencing on July 1, 2016.	2/1/2017
9	The new authorized budget with the authorized interim budget was trued-up in accordance with PG&E's cost recovery mechanisms as outlined in A.14-11-010. RAD to be done in Jan 2017 for D.16-11-002 as the new budget is authorized beginning Jan 1st.	D.15-12-024	OP6	Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company (IOUs) shall address any under-/over-collection that results from authorized program spending level increases or decreases as a result of a final decision in Applications (A.) 14-11-007, A.14-11-009, A.14-11-010, and A.14-11-011 in each of the IOUs' gas Public Purpose Program Surcharge, electric Public Purpose Program mechanisms, and/or currently authorized ratemaking procedures.	2/1/2017
10	The IOU's annual estimate of customers eligible for the CARE program was filed by PG&E on February 10, 2017.	D.16-11-022	Email Ruling dated 12/21/2016	File the annual estimate of customers eligible for the CARE program by February 12th each year; this annual filing was not included in D.16-11-022, so was requested in the Motion for Extension on 12/9/16. ALJ granted the joint motion by email Ruling on December 21, 2016.	2/10/2017
11	PG&E removed measure caps in Q1 2017.	D.16-11-022	OP 28	28. Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company shall remove the measure caps for an individual program measure.	3/1/2017

2017 ESA-CARE Program Activities and Compliance					
No	ESA-CARE Activity	CPUC Directive	Directive Reference	Action Required	Complete Date
12	The IOUs held a public workshop on March 8, 2017, to present existing and planned energy education modules.	D.16-11-022	OP 39	39. Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company shall hold a public day long workshop within 120 days of the effective date of this Decision, to present their existing and planned energy education modules. The workshop will also cover new initiatives directed in this Decision, including the use of My Energy/My Account and end-use disaggregation reports in delivering energy education.	3/8/2017
13	Funding changes were made in the Conforming AL filed on April 3, 2017. The PFM requested various changes that impacted budget reporting.	ALJ Colbert's Ruling 4/7/2016		2. PG&E shall adjust its funding request in its comments on the proposed decision concerning this proceeding or via a Petition for Modification.	4/3/2017
14	PG&E filed its Conforming Advice Letter 3830-G/5043-E on April 3, 2017.	D.16-11-022	OP91	91. Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company shall issue its conforming Advice Letter that outlines a data sharing plan with specific California LifeLine providers who opt in to an agreement to generate bidirectional automatic leads between LifeLine participants and California Alternate Rates for Energy Program and Energy Savings Assistance Program participants.	4/3/2017
15	PG&E filed its Conforming Advice Letter 3830-G/5043-E on April 3, 2017.	D.16-11-022	OP 46	46. Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company shall file in its conforming Advice Letter an owner or authorized representative affidavit process for buildings located in a PRIZM Code, census tract, or federally recognized tribal reservation or zone where 80% of households are at or below 200% of federal poverty guidelines; a Promise Zone as designated by the federal government, or; the building is registered as low income affordable housing with Energy Savings Assistance (ESA) Program qualified income documentation, that is less than 12 months old, on file. These buildings will be eligible for whole building enrollment without the need for door to door tenant income documentation. The process shall allow for large portfolio owners/operators to simultaneously submit affidavits for many properties in multiple service territories at one time. This self certification affidavit shall also act as Property Owner Waiver form for ESA Program and other Energy Efficiency program installations. This process shall be submitted to the Commission for approval via a Tier 1 advice letter.	4/3/2017
16	PG&E filed its Conforming Advice Letter 3830-G/5043-E on April 3, 2017.	D.16-11-022	OP 91	91. For the ESA Program: Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company shall issue its conforming Advice Letter that outlines a data sharing plan with specific California LifeLine providers who opt in to an agreement to generate bidirectional automatic leads between LifeLine participants and California Alternate Rates for Energy Program and Energy Savings Assistance Program participants.	4/3/2017
17	PG&E filed its Conforming Advice Letter 3830-G/5043-E on April 3, 2017.	D.16-11-022	Text 37-38	We direct each utility to file a Tier 2 "conforming Advice Letter" within 60 days of this Decision to conform final program energy savings goals and budgets to the directives herein. The conforming Advice Letter should include program costs for approved measures, penetration goals, cost effectiveness values, and any other updated factors. The conforming Advice Letter should include budget numbers for 2018 2020 based on the 2017 approved budget with up to a 2% upward adjustment for each year after 2017.	4/3/2017
18	PG&E filed its Conforming Advice Letter 3830-G/5043-E on April 3, 2017. Directives are tracked and reported at LIOB, and in Monthly and Annual Reports.	D.16-11-022	Text -various	LIOB reporting requirements: P.30-40,IOUs shall continue to report on its balances of unspent and underspent funds to both the Commission in its ongoing reports and in its reports to the LIOB. IOUs shall report on factors driving unspent fund balances, steps taken to appropriately deploy funds, and make suggestions to the mid-cycle Wkg Grp about adjustments that would help deploy funds authorized by this Decision. P.54,Order tracking of customers who elect to "opt-in" to a new DR, TOU, or Critical Peak Pricing (CPP) program, and report that information in the IOUs' ESAP annual reports, and in quarterly reports to the LIOB providing ESA updates. P. 194,IOUs shall report quarterly to the LIOB, and annually in their report to the Commission on Multi-Family common area measure participation, program spending, and provide an analysis of treatment results including, but not limited to, energy and water/energy nexus savings. P.320, ... because several proceedings will benefit from the development of these My Energy/My Account upgrades, carefully track their costs, so that these costs can be considered in this and other proceedings' decision making related to cost effectiveness. Otherwise, the CARE and ESA programs will appear more costly than they truly are (given that all costs are allocated to them, but only some of the benefits), and programs in other proceedings will appear less costly than they truly are (because they receive the benefits of these efforts, without being allocated their costs). We therefore direct the IOUs to track the costs of the above efforts in a separate subaccount, to identify all of the programs or initiatives that will be able to benefit from them, and to coordinate with the relevant proceedings so that the relevant costs can be considered in those proceedings' cost effectiveness decision making. These findings should be reported in the CARE ESA Annual Report, to the LIOB, and broken out and delivered to Energy Division as a separate part of the annual report. P.358-359, With budgets adopted in this Decision, we expect the IOUs to keep pace with the expenditures and to report at least quarterly to the LIOB (in addition to the existing monthly reports to the Commission's ED) and in their annual reports about progress toward achievement of program goals and levels of spending.	4/3/2017

2017 ESA-CARE Program Activities and Compliance					
No	ESA-CARE Activity	CPUC Directive	Directive Reference	Action Required	Complete Date
19	The energy education public workshop was held on March 8, 2017. SDG&E sent to Report to the service list in two emails on 4/4/2017.	D.16-11-022	OP 40	40. Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company shall prepare a workshop report after the workshop ordered in the previous ordering paragraph and serve it to this proceeding's service list.	4/14/2017
20	PG&E coordinated with local entities re shoulder season plans and heat triggers. These were emailed to local agencies and included in PG&E's annual reports.	D.16-11-022	OP 126	126. Pacific Gas and Electric Company, Southern California Edison Company and San Diego Gas & Electric Company must continue to coordinate with local entities regarding heat triggers in their respective service territories and to ensure that there are plans in place to meet the needs of communities when high temperatures occur either before or after the cooling center season, which generally runs each year from May 15 through October 15. The utilities are directed to include these shoulder season plans in their annual reports.	4/26/2017
21	Incremental benefit to existing local government cooling center patrons resulting from authorized cooling center funding are documented in PG&E's Annual Cooling Center Program Report for Program Year 2017 filed in December 2017, and described in PG&E's CARE Cooling Center Brochure and PG&E's Integrated Program Brochure.	D.16-11-022	OP 123	123. Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company must ensure that their websites are updated for future cooling center seasons with user friendly information regarding availability of public cooling centers in their service territories. The websites should clearly display site names, locations, and hours of operation. This information should be easily viewable from both desktop computers and mobile devices. E mail blasts, bill inserts, print/radio ads, and specific targeting to medical baseline customers must also be utilized to promote cooling center awareness and generate program enrollments, along with any other effective marketing and outreach tactics. To the extent possible, all printed materials must be made available in formats accessible to disabled and limited English speaking populations. Educational materials provided in the cooling centers should also include outreach regarding the recently adopted changes to retail rates.	5/1/2017
22	PG&E continued to work with CSID and the designated CBOs	D.15-12-047	OP 18a	Pacific Gas and Electric Company, Southern California Edison, Southern California Gas Company, and San Diego Gas & Electric Company shall continue to be involved in the ongoing Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program, at a minimum, in the following ways: a. The IOUs are directed to work with the designated community-based organizations (and if necessary, the prime contractor and CSID staff designee for the CHANGES program) in resolving consumers' energy-related issues.	5/1/2017
23	The cooling center website was updated with a pdf list of cooling centers and hours of operation. Cooling center brochures were mailed to each cooling center which will be displayed at their locations and cooling tips. PG&E integrated brochures, and CARE applications were mailed June 15 to the centers with updated income guidelines .	D.16-11-022	OP 125	125. Pacific Gas and Electric Company, Southern California Edison Company and San Diego Gas & Electric Company must include all cooling centers in their online maps, including those centers funded from non ratepayer funds.	5/5/2017
24	PG&E hosted a ESA/CARE Joint IOU Marketing & Outreach Workshop on May 23, 201e filing of the SW integrated 5 Year Roadmap, following th. Detailed presentations of CARE and ESA plans were made.	D.16-11-022	OP 35	35. Pacific Gas and Electric Company's shall host a Marketing and Outreach workshop, as described in this decision. At this workshop, the four large utilities (Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, Southern California Edison Company or Investor Owned Utilities) must provide detailed presentations (to be shared with the service list prior to the workshop) of preliminary California Alternate Rates for Energy Program and Energy Savings Assistance Program Marketing and Outreach plans.	5/23/2017
25	The IOUs re-established the ESA Mid-Cycle Working Group in 2017. PG&E hosted multiple meetings to address tasks outlined in D.16-11-022, including to revise Monthly and Annual Reporting requirements, the Policy and Procedures Manual, and the Installations Standards Manual.	D.16-11-022	OP 66	66. Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company are jointly charged with soliciting and re establishing the Energy Savings Assistance Program mid cycle Working Group.	5/25/2017
26	Included in PG&E's Conforming Advice Letter Supplement (3830-G-A/5043-E-A) on June 20, 2017.	D.17-12-009	OP 102, p.491-492	104. Funding for the Assembly Bill 793, Energy Management Technologies and the My Energy/My Account Platforms are directed to be paid for from the California Alternate Rates for Energy Program Information Technology Programming and Energy Savings Assistance (ESA) Program General Administration Budgets respectively. Southern California Gas Company's requested \$405,460 (split for 2015 and 2016) for these efforts is approved and adopted for Pacific Gas and Electric Company, Southern California Edison Company and San Diego Gas & Electric. Additional collections that would ordinarily be required for this funding authorization will be mitigated or rendered unnecessary through the application of unspent 2009 2016 ESA funds, which will offset collections in the this Program cycle.	6/20/2017

2017 ESA-CARE Program Activities and Compliance					
No	ESA-CARE Activity	CPUC Directive	Directive Reference	Action Required	Complete Date
27	PG&E began implementing and tracking go-backs in 2017. Results are reported in the 2017 ESA Annual report.	D.16-11-022	ESA Reporting >text=various	Text p.69: We direct the utilities to track in its reporting how many visits are "first touches" (households that have not received ESA treatment) versus "go backs." The utilities should track the number of "go backs," the energy savings resulting from the treatment from the "go back" and additional measures to determine what percentage of the utility's energy savings target (as discussed above) is a result from a "go back" versus a "first touch" for a customer. Text 84: clarify that for households that are served by multiple utilities with customers eligible for ESA Program services, the utilities may not count the households treated until all of the required measures, as determined by the needs assessment or audit at that household, have been installed. The utilities are further required to include in their annual reports the number of households receiving such coordinated treatment, the number that received ESA measures from the reporting utility but not from the partner utility or program, and the reasons for those failed coordination attempts (to the extent known).	6/21/2017
28	An Annual Report Public Meeting was held in San Francisco on June 22, 2017.	D.17-12-009	text-p63	D.17-12-009: ...we retain the directive for the IOU's to host a workshop with CSD. For efficiency, this workshop shall be incorporated in the public meetings directed in D.12-08-044, OP 5 directing the IOU's to review and discuss the prior years' CARE and ESA Program activities. D.12-08-044: These Utilities shall convene a minimum of one public meeting per year, within 60 days of their filing of the annual reports and other public meetings as deemed necessary by either the Utilities, ED, the ALJ or the Commission.	6/22/2017
29	PG&E phased out CFLs in 2017, and began offering LEDs. The ESA program launched LED A-Lamps January 2, 2017. LED fixtures launched April 2017. CFLs were completely phased out by September 2017.	D.16-11-022	OP 19	19. The complete phase-out of Compact Fluorescent Lightbulbs (CFL) in the Energy Savings Assistance (ESA) Program shall occur for San Diego Gas & Electric Company (SDG&E), Southern California Edison Company (SCE) and Pacific Gas and Electric Company (PG&E) as soon as practicable and no later than January 1, 2018. SDG&E, SCE and PG&E shall incrementally add light emitting diode (LED) bulbs that meeting the California Energy Commission's LED lamp specification requirements to their ESA Program. We direct SCE, SDG&E, and PG&E to begin offering LED bulbs that are in compliance with this new standard and any future updates. Text p.114: PG&E is ordered to pursue cost-effective LED products at least on par with the prices proposed by SCE and SDG&E for their LED programs.	6/30/2017
30	PG&E reported on CHANGES in its Monthly Report and at two LIOB meetings in 2017.	D.15-12-047	OP 16, OP 17	Pacific Gas and Electric Company, Southern California Edison, Southern California Gas Company, and San Diego Gas & Electric Company shall not include the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program activities in their California Alternate Rates for Energy (CARE) program monthly reports once the CHANGES program is no longer funded through the CARE program, but shall report on CHANGES Activities and trends raised in issues faced by CHANGES clients at least two times per year during reports at the California Public Utilities Commission's Low-Income Oversight Board meetings.	7/3/2017 and 12/4/2017
31	PG&E's (U 39 M) Marketing and Outreach Plan for Low Income Per Decision 16-11-022 was filed on July 21, 2017 with the CPUC and served upon all parties listed on the official service list for A.14-11-007 et al.	D.16-11-022	OP 36	36. Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), and Southern California Gas Company (SoCalGas) (collectively IOUs) shall work with the Commission's Energy Division at the Marketing and Outreach (M&O) workshop to encourage and seek useful input from workshop participants. PG&E, SCE, SDG&E, and SoCalGas shall submit revised, detailed M&O plans, incorporating input gathered from the workshop. These plans should include a clear description of how IOUs will leverage and coordinate with M&O activities currently under consideration in the mainstream Energy Efficiency Proceeding (Rulemaking (R.) 13 11 005) and in the Residential Rate Reform Proceeding (R.12 06 013).	7/21/2017
32	By July 2017, PG&E complied with the directives of D.16-11-022, OP.109: -- CARE automatically transfers participation when a customer stops service at one address and starts service at a new address if customer was on CARE and within 90 days of a new service starting on that same account number. -- CARE provided this data (Q2 2017) to populate the new EPO enhancement filter created for "CARE Recently Moved" -- ESA Program outreach contractors, can obtain leads for CARE customers who have moved to new address by selecting filters, "CARE Recently Moved" and "Untreated" in the Global List function in EPO.	D.16-11-022	OP 109	109. Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company shall automatically transfer a customer's California Alternate Rates for Energy Program participation when a customer stops service at one address and starts service at a new address. The Energy Savings Assistance (ESA) Program shall screen this new address for prior treatment and this customer will be provided as a lead to ESA Program outreach contractors. The information provided to the contractors shall also include information noting that the customer recently started service at the new address, and whether the customer participated in the ESA Program at his or her previous address (and if so, when).	7/21/2017

2017 ESA-CARE Program Activities and Compliance					
No	ESA-CARE Activity	CPUC Directive	Directive Reference	Action Required	Complete Date
33	PG&E updated its database systems to track the number of households with an inefficient 2nd refrigerator eligible for replacement.	D.16-11-022	OP14	14. Pacific Gas and Electric Company, Southern California Edison Company and San Diego Gas & Electric Company shall track the number of households treated under the Energy Savings Assistance Program where there is an inefficient second refrigerator onsite that would otherwise be eligible for replacement under the revised Program rules. Using this data, the Investor Owned Utilities should determine whether it is most effective to offer a second refrigerator replacement to all, or to limit replacements to certain criteria or groups, and shall make appropriate proposals for the next Program cycle.	9/5/2017
34	The IOUs discussed coordination of ESA impacts with the Cal Technical forum in 2017. It was determined that the ESA impact evaluation schedule made 2018 a more feasible time for coordinating with the Cal Tech forum.	D.16-11-022	Text p.397	p. 397: We direct the IOUs to coordinate with the California Technical forum to recommend prospective savings values and revisions to its EM&V methodologies for the low-income program.	9/6/2017
35	No PG&E households received energy education only in 2017; however, set up tracking to ensure that no household receiving energy education alone would be counted as treated. This was reported in Monthly Reports beginning in October 2017, prior to implementation of new reporting tables for 2018..	D.16-11-022	OP11	11. The four large Investor Owned Utilities' (Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, Southern California Edison Company) (IOUs') shall not count a household as "treated" if provided energy education alone. The four large IOUs must track and report all households that only receive Energy Education in their monthly and annual compliance reports. Households receiving only education will not be permitted to self certify and these households will be required to demonstrate their eligibility to receive energy education.	10/23/2017
36	Cooling Centers are being added to the 2020 GRC Pricing Products and Low Income chapters.	D.16-11-022	OP 116	116. Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company (electric Investor-Owned Utilities) shall include cooling center costs in their General Rate Case Proceedings going forward. The electric Investor Owned Utilities are authorized to continue to utilize California Alternate Rates for Energy Program administrative dollars for cooling center activity, only until each utility's next General Rate Case.	12/4/2017
37	Updates to My Account were performed by PG&E's IT.	D.16-11-022	OP 76, p.482	77. By December 31, 2017, Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company shall update their My Account/My Energy websites for mobile versioning (must be viewable from a mobile browser, application or device). These updates, among other upgraded functions, must allow a customer to be able to facilitate secure California Alternate Rates for Energy Program Post Enrollment Verification and Recertification Processes.	12/6/2017
38	Updates to My Account were performed by PG&E's IT.	D.17-12-009	OP 81, p.484	82. By December 31, 2017, Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company shall, if they have not already done so, develop mobile versioning of their websites that allow, among other specified functions, secure California Alternate Rates for Energy Program Post Enrollment Verification and Recertification.	12/6/2017
39	Updates to My Account were performed by PG&E's IT.	D.17-12-009	OP 99, p.490	100. By December 31, 2017, Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company shall ensure that the mobile versioning of the IOU's websites allow California Alternate Rates for Energy Program Post Enrollment Verification and Recertification Processes also allow viewing of household hourly interval energy usage for energy management purposes.	12/6/2017
40	Updates to My Account were performed by PG&E's IT.	D.17-12-009	OP 100, p.491	102. By December 31, 2017, Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company (the Investor-Owned Utilities) must update their My Account/My Energy websites for mobile versioning (i.e., must be viewable from a mobile browser or device). These updates must allow a customer to be able to increase the font size on the screen, be available in the main Limited English Proficient languages in the Investor Owned Utility's service territory, allow for enrollment in the California Alternate Rates for Energy Program (CARE) and allow for CARE Program application processing status updates.	12/6/2017

2017 ESA-CARE Program Activities and Compliance					
No	ESA-CARE Activity	CPUC Directive	Directive Reference	Action Required	Complete Date
41	Updates to My Account were performed by PG&E's IT.	D.16-11-022	OP 103	103. To prevent the enrollment of ineligible households into the California Alternate Rates for Energy (CARE) Program Programming and the generation of false leads into the Energy Savings Assistance (ESA) Program, Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company (the four large Investor Owned Utilities) must prescreen My Account/My Energy customers so that only those with a high likelihood of CARE Program eligibility are provided a customized or tailored My Energy/ My Account experience that allows for CARE Program Programming and ESA Program enrollment. This prescreening process shall mimic the logic employed by the four large Investor Owned Utilities' probability modeling utilized in the CARE Program post enrollment verification process.	12/6/2017
42	In early December 2017, PG&E completed the updates to its MyAccount website for mobile versioning, as required by D.16-11-022, OP.102.	D.16-11-022	OP 102	For the ESA Program: By December 31, 2017, Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company (the Investor-Owned Utilities) must update their My Account/My Energy websites for mobile versioning (i.e., must be viewable from a mobile browser or device). These updates must allow a customer to be able to increase the font size on the screen, be available in the main Limited English Proficient languages in the Investor Owned Utility's service territory, allow for enrollment in the California Alternate Rates for Energy Program (CARE) and Energy Savings Assistance (ESA) Program, allow for CARE Program and ESA Program application processing status updates.	12/6/2017
43	PG&E worked with the other IOUs to align and document its CARE High Usage Appeals Process.	D.16-11-022	OP87	87. Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company (the three large electric Investor Owned Utilities) shall align their internal California Alternate Rates for Energy Program High Usage Appeals Process with the goal of equality and uniformity across service territories. The three large electric Investor Owned Utilities' High Usage Appeals Boards shall use the same criteria and evaluation of customer appeals.	12/12/2017
44	Incremental benefit to existing local government cooling center patrons resulting from authorized cooling center funding, such as an increase in the number of patrons, and/or in an increase in the availability and accessibility of cooling center are documented in PG&E's Annual Cooling Center Program Report for Program Year 2017 filed in December 2017, and described in PG&E's CARE Cooling Center Brochure and PG&E's Integrated Program Brochure.	D.16-11-022	OP 117	117. Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company (the electric Investor Owned Utilities) must demonstrate that all authorized cooling center funding results in incremental benefit to existing local government cooling center patrons, in an increase in the number of patrons, and/or in an increase in the availability and accessibility of cooling centers (for example: longer hours or more locations). The electric Investor Owned Utilities must also demonstrate that the cooling centers specifically benefit the low income population.	12/20/2017
45	Incremental benefit to existing local government cooling center patrons resulting from authorized cooling center funding are documented in PG&E's Annual Cooling Center Program Report for Program Year 2017 filed in December 2017, and described in PG&E's CARE Cooling Center Brochure and PG&E's Integrated Program Brochure.	D.16-11-022	OP 120	120. Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company shall inform cooling center patrons how to escape heat, how to minimize energy usage, and what low income and other programs are available to further assist cooling center patrons, including relevant transportation and accessibility issues.	12/20/2017
46	Incremental benefit to existing local government cooling center patrons resulting from authorized cooling center funding are documented in PG&E's Annual Cooling Center Program Report for Program Year 2017 filed in December 2017, and described in PG&E's CARE Cooling Center Brochure and PG&E's Integrated Program Brochure.	D.16-11-022	OP 122	122. Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company shall continue to produce the cooling center compliance annual report, but may in the future revisit the existing metrics and modify where appropriate. The reports must inform the Commission of how ratepayer funds are being utilized to support and promote cooling centers and simultaneously encourage low income program enrollments and participation throughout the state. The reports must also include a description of any changes to cooling center operations that were enabled by ratepayer funding, such as extended hours or the opening of additional locations. If no such changes occurred, that must still be reported.	12/20/2017
47	Budgets and coordination efforts were included in PG&E's (U 39 M) Annual Cooling Center Program Report for Program Year 2017, filed on Dec. 20, 2017 with the CPUC and served in A.11-05-017 et al.	D.16-11-022	text-p334	We direct the utilities to continue current coordination efforts with local and tribal entities with respect to cooling center operations, and approve cooling center budgets for SCE, SDG&E, and PG&E that are more closely aligned with actual expenditures for prior program years, instead of relying solely on previously authorized amount.	12/20/2017
48	Included in PG&E's (U 39 M) Annual Cooling Center Program Report for Program Year 2017, filed on Dec. 20, 2017 with the CPUC and served in A.11-05-017 et al.	D.16-11-022	text 336	Cooling Centers: Allowing CARE to support transportation to Cooling Centers as a pilot before Cooling Center expenditures are considered in the GRC will give the Commission data to examine the effect of transportation, and the combination of transportation and education, on cooling center participation and ESA enrollment by eligible low-income customers. We authorize the use of unspent program funds for these purposes.	12/20/2017

2017 ESA-CARE Program Activities and Compliance					
No	ESA-CARE Activity	CPUC Directive	Directive Reference	Action Required	Complete Date
49	Incremental benefit to existing local government cooling center patrons resulting from authorized cooling center funding are documented in PG&E's Annual Cooling Center Program Report for Program Year 2017 filed in December 2017, and described in PG&E's CARE Cooling Center Brochure and PG&E's Integrated Program Brochure.	D.16-11-022	OP 121	121. Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company must ensure information is available to cooling center patrons regarding how customer bills may be impacted by the recently adopted retail rates reform and on what customers can do to offset bill increases, such as conserving, participating in demand response programs, and participating in the Energy Savings Assistance (ESA) or other energy efficiency programs. This outreach should be conducted in coordination with any Marketing Outreach and Education programs and aligned with all updates to the utilities' ESA Program Energy Education modules.	12/21/2017
50	The ESA program leveraged and coordinated with the Energy Efficiency Team's Energy Insight Data Platform, though IT, to develop the Energy Insight Data Platform for ESA.	D.16-11-022	OP 94	For the ESA Program: Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company shall coordinate their information technology upgrades with any planned Information Technology (IT) in other proceedings, including the new energy efficiency financing pilot programs directed in Decision 13 09 044, to leverage economies of scale and reduce overall IT upgrade costs.	12/29/2017

7. **Appendix B: ESA and CARE Program Tables**

Summary Table – ESA Program and CARE Program

ESA Program – Table 1 – Overall Program Expenses

ESA Program – Table 2 – Expenses & Energy Savings by Measures Installed

ESA Program – Table 2A - Expenses & Energy Savings by Measures Installed: CSD Leveraging

ESA Program – Table 2B - Expenses & Energy Savings by Measures Installed: MF Common Area

ESA Program – Table 3 – Cost Effectiveness

ESA Program – Table 4 – Detail By Housing Type and Source

ESA Program – Table 5 – Direct Purchases & Installation Contractors

ESA Program – Table 6 – Installation Cost of Program Installation Contractors

ESA Program – Table 7 – Expenditures by Cost Elements

ESA Program – Table 8 – Homes Unwilling/Unable to Participate

ESA Program – Table 9 – Life Cycle Bill Savings by Measure

ESA Program – Table 10 – Energy Rate Used for Bill Savings Calculations

ESA Program – Table 11 – Bill Savings Calculations by Program Year

ESA Program – Table 12 – Fund Shifting

ESA Program – Table 13 – Categorical Enrollment

ESA Program – Table 14 – Leveraging and Integration

ESA Program – Table 15 – Lighting

ESA Program – Table 16 – “Add Back” Measures

ESA Program – Table 17 – Expenditures for Pilots and Studies

ESA Program – Table 18 – Miscellaneous (2nd Refrigerators, Education Only, A/C Cycling, etc.)

CARE Program – Table 1 – CARE Overall Program Expenses

CARE Program – Table 2 – CARE Enrollment, Re-certification, Attrition, and Penetration

CARE Program – Table 3A – CARE Post Enrollment Verification Results (Model)

CARE Program – Table 3B – CARE Post Enrollment Verification Results (High Usage)

CARE Program – Table 4 – Self Certification and Re-Certification

CARE Program – Table 5 – Enrollment by County

CARE Program – Table 6 – Re-certification Results

CARE Program – Table 7 – Capitation Contractors

CARE Program – Table 8 – Participants per Month

CARE Program – Table 9 – Average Monthly Usage & Bill

CARE Program – Table 10 – CARE Surcharge & Revenue

CARE Program – Table 11 – CARE Capitation Applications

CARE Program – Table 12 – CARE Expansion Program

CARE Program – Table 13 – CARE High Usage Verification Results

CARE Program – Table 13A – CARE Customer Usage and ESA Program Treatment

CARE Program – Table 14 – CARE Categorical Enrollment

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**Energy Savings Assistance Program and
California Alternate Rates for Energy Program
Pacific Gas and Electric Company
2017 Summary Highlights**

ESA Program

2017 Energy Savings Assistance Program Summary			
2017	Authorized / Planning Assumptions	Actual	%
Budget	\$154,671,971	\$122,778,059	79%
Funded from 2009-2016 Unspent Fu	\$30,416,596	\$2,377,763	8%
Summary Homes Treated	90,030	87,052	97%
Summary kWh Saved	47,000,000	59,263,365	126%
Summary kW Demand Reduced	55,000	69,550	126%
Summary Therms Saved	2,000,000	1,651,228	83%
First Touches Homes Treated		51,442	
- kWh Saved		31,457,458	
- kW Demand Reduced		33,528	
- Therms Saved		1,002,633	
Go-Backs/Retreated Homes		35,610	
- kWh Saved		27,805,907	
- kW Demand Reduced		36,022	
- Therms Saved		648,595	

Note: The authorized budgets (including from unspent funding) and values shown for planning assumptions are from PG&E Conforming Advice Letter 3830-G/5043-E filed on April 3, 2017 and Supplemental Conforming Advice Letter 3830-G-A/5043-E-A filed on June 20, 2017. These were authorized by Commission Resolution G-3531 issued December 21, 2017.

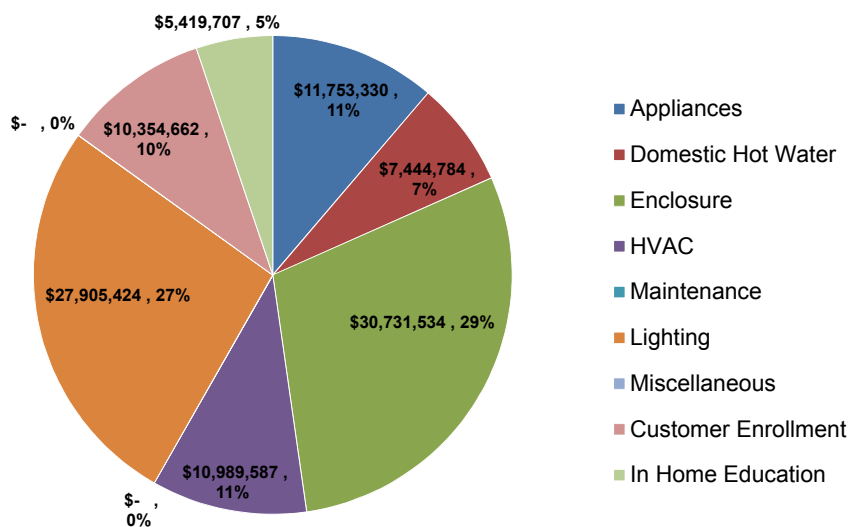
There were no authorized planning assumptions for First Touch or ReTreated homes in D.16-11-022.

CARE Program

2017 CARE Program Summary			
2017	Authorized Budget	Actual	%
Administrative Expenses	\$18,060,001	\$13,168,911	73%
Subsidies	\$580,353,000	\$643,538,184	111%
Service Establishment Charge			
Total Program Costs and Discoun	\$598,413,001	\$656,707,096	110%
2017 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	16,314	93,628	140,061
2017 CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
Total Enrolled	1,588,016	1,406,396	89%

[1] Total program administrative expenses did not exceed the overall authorized budget. The CARE discount exceeded the authorized amount by \$63,185,184. Per D.02-09-021, PG&E is authorized to recover the full value of the discount through the CARE two-way balancing account on an automatic pass-through basis.

**2017
ESA Program Energy Efficiency Expenditures by Measure Group**



Pacific Gas and Electric Company
PY 2017 ESA-CARE Annual Report

	A	B	C	D	E	F	G	H	I	J
1	ESA Table 1 - ESA Overall Program Expenses									
2	Pacific Gas and Electric Company									
3	Program Year 2017									
4		2017 Authorized Budget [1] [2] [3]			2017 Annual Expenses			% of Budget Spent		
5	ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
6	Energy Efficiency									
7	Appliances	\$ 11,162,774	\$ 2,427,200	\$ 13,589,974	\$ 11,162,774	\$ 590,557	\$ 11,753,330	100%	24%	86%
8	Domestic Hot Water	\$ 577,102	\$ 8,425,937	\$ 9,003,039	\$ 446,451	\$ 6,998,333	\$ 7,444,784	77%	83%	83%
9	Enclosure	\$ 7,314,222	\$ 33,178,868	\$ 40,493,090	\$ 5,099,450	\$ 25,632,084	\$ 30,731,534	70%	77%	76%
10	HVAC	\$ 6,924,903	\$ 7,789,302	\$ 14,714,206	\$ 6,924,903	\$ 4,064,684	\$ 10,989,587	100%	52%	75%
11	Maintenance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
12	Lighting	\$ 35,898,232	\$ -	\$ 35,898,232	\$ 27,905,424	\$ -	\$ 27,905,424	78%	0%	78%
13	Miscellaneous	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
14	Customer Enrollment	\$ 5,851,950	\$ 5,401,800	\$ 11,253,750	\$ 5,384,424	\$ 4,970,238	\$ 10,354,662	92%	92%	92%
15	In Home Education	\$ 3,089,830	\$ 2,852,150	\$ 5,941,980	\$ 2,818,248	\$ 2,601,459	\$ 5,419,707	91%	91%	91%
16	Pilot	\$ 127,400	\$ 117,600	\$ 245,000	\$ -	\$ -	\$ -	0%	0%	0%
17	Implementation [4]	\$ 3,372,706	\$ 2,809,123	\$ 6,181,830	\$ 3,372,706	\$ 1,960,196	\$ 5,332,902	100%	70%	86%
18	Energy Efficiency TOTAL	\$ 74,319,119	\$ 63,001,981	\$ 137,321,100	\$ 63,114,381	\$ 46,817,550	\$ 109,931,931	85%	74%	80%
19	Training Center	\$ 573,279	\$ 529,181	\$ 1,102,460	\$ 198,317	\$ 183,062	\$ 381,378	0%	0%	0%
20	Inspections	\$ 2,613,564	\$ 2,412,520	\$ 5,026,084	\$ 2,049,320	\$ 1,891,680	\$ 3,941,001	78%	78%	78%
21	Marketing and Outreach	\$ 1,077,723	\$ 994,821	\$ 2,072,544	\$ 799,801	\$ 738,278	\$ 1,538,079	74%	74%	74%
22	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
23	Measurement and Evaluation Studies	\$ 134,420	\$ 124,080	\$ 258,500	\$ 29,549	\$ 27,276	\$ 56,824	22%	22%	22%
24	Regulatory Compliance	\$ 271,053	\$ 250,203	\$ 521,256	\$ 198,837	\$ 183,542	\$ 382,380	73%	73%	73%
25	General Administration	\$ 4,321,131	\$ 3,988,736	\$ 8,309,867	\$ 3,372,879	\$ 3,113,427	\$ 6,486,307	78%	78%	78%
26	CPUC Energy Division	\$ 31,283	\$ 28,876	\$ 60,159	\$ 31,283	\$ 28,876	\$ 60,159	100%	100%	100%
27	TOTAL PROGRAM COSTS	\$ 83,341,572	\$ 71,330,399	\$ 154,671,971	\$ 69,794,367	\$ 52,983,692	\$ 122,778,059	84%	74%	79%
28	Funded Outside of ESA Program Budget									
29	Indirect Costs				\$ -	\$ -	\$ -			
30	NGAT Costs				\$ -	\$ 3,710,040	\$ 3,710,040			
31										
32	[1] Authorized budget includes \$5,159.35 carried forward from 2016 due to the CPUC Energy Division costs going over the authorized budget. This was due \$6,035.84 of invoices for PY2016 recorded in 2017; these invoices were received in June 2017 after the PY2016 annual report was filed. An advice letter to shift these funds from 2016 to 2017 will be filed.									
33	[2] Reflects the funding authorized in D.16-11-022 per year and updated in Commission Resolution G-3531 issued December 21, 2017 which addressed PG&E Conforming Advice Letter 3830-G/5043-E filed on April 3, 2017 and Supplemental Conforming Advice Letter 3830-G-A/5043-E-A filed on June 20, 2017.									
34	[3] Program budgets have been updated by \$1,738,402 to include employee benefits costs approved in the GRC (D.17-05-013) - Decision Authorizing Pacific Gas and Electric Company's General Rate Case Revenue Requirement for 2017-2019, issue date of May 11, 2017.									
35	[4] This budget category includes the administrative fee paid to PG&E's ESA Regional Administrators. In the past, PG&E apportioned this fee across measures, but now tracks it separately.									
36										

Pacific Gas and Electric Company
PY 2017 ESA-CARE Annual Report

	A	B	C	D	E	F	G	H	I	J
1	ESA Table 1A - Expenses Funded From 2009-2016 Unspent ESA Program Funds									
2	Pacific Gas and Electric Company									
3	Program Year 2017									
4		Authorized Budget [1]			Annual Expenses			% of Budget Spent YTD		
5	ESA Program	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
6	Energy Efficiency									
7	Appliances [2]	\$ 10,746,138	\$ -	\$ 10,746,138	\$ -	\$ -	\$ -	0%	0%	0%
8	Domestic Hot Water [2]	\$ 8,775	\$ 15,745	\$ 24,520	\$ -	\$ -	\$ -	0%	0%	0%
9	Lighting [2]	\$ 9,604,957	\$ -	\$ 9,604,957	\$ -	\$ -	\$ -	0%	0%	0%
10	In Home Energy Education [2]	\$ 465,955	\$ 430,112	\$ 896,067	\$ -	\$ -	\$ -	0%	0%	0%
11	Implementation [3]	\$ 62,400	\$ 57,600	\$ 120,000	\$ 18,841	\$ 17,391	\$ 36,232	30%	30%	30%
12	Multi-Family Common Area Measures	\$ 2,808,000	\$ 2,592,000	\$ 5,400,000	\$ 23,568	\$ 21,755	\$ 45,323	1%	1%	1%
13	Leveraging - CSD and MCE [4]	\$ 2,331,835	\$ 537,079	\$ 2,868,914	\$ 1,750,000	\$ -	\$ 1,750,000	75%	0%	61%
14	Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
15	Measurement and Evaluation Studies	\$ 46,800	\$ 43,200	\$ 90,000	\$ -	\$ -	\$ -	0%	0%	0%
16	Regulatory Compliance	\$ 48,880	\$ 45,120	\$ 94,000	\$ -	\$ -	\$ -	0%	0%	0%
17	General Administration	\$ 297,440	\$ 274,560	\$ 572,000	\$ 284,028	\$ 262,180	\$ 546,207	95%	95%	95%
18										
19	TOTAL UNSPENT PROGRAM COSTS [1]	\$ 26,421,180	\$ 3,995,416	\$ 30,416,596	\$ 2,076,437	\$ 301,326	\$ 2,377,763	8%	8%	8%
20										
21	[1] D.16-11-022 directed funding for new initiatives to come from unspent 2009-2016 ESA Program funds, and directed IOUs to update their budgets by Conforming Advice Letter. Resolution G-3531 authorized PG&E's 2017-2020 ESA budget, including the addition of unspent funding reported here.									
22	[2] Incremental increases in existing energy efficiency measures from new directives (e.g., removal of 3 measure minimum) use authorized funds shown in Table 1 until depleted, then will use carryover funds. New measures and activities not included in PG&E' Application use 2009-2016 unspent funds.									
23	[3] This budget category includes the primary administrative fee for Implementer(s), including multifamily SPOC activities.									
24	[4] Includes unspent funds transferred to Marin Clean Energy (as authorized by OP 147 in Decision 16-11-022) and unspent funds to support Department of Community Services and Development's Low-Income Weatherization Program initiative.									

ESA Table 2 - Measure Installations and Savings
Pacific Gas and Electric Company
Program Year 2017

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
1																								
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	A	B	C	D	E	F	G	H
1	ESA Table 2A - CSD Measure Installations and Savings							
2	Pacific Gas and Electric Company							
3	Program Year 2017							
4								
5								
6			ESA Program - CSD Leveraging [6]					
7	Measures	Units	Quantity Installed	kWh [3] (Annual)	kW [3] (Annual)	Therms [3] (Annual)	Expenses (\$)	% of Expenditure
8	Appliances							
9	High Efficiency Clothes Washer	Each						#DIV/0!
10	Refrigerators	Each						#DIV/0!
11	Microwaves [4]	Each						#DIV/0!
12	Domestic Hot Water							
13	Water Heater Blanket [5]	Home						#DIV/0!
14	Low Flow Shower Head [5]	Home						#DIV/0!
15	Water Heater Pipe Insulation [5]	Home						#DIV/0!
16	Faucet Aerator [5]	Home						#DIV/0!
17	Water Heater Repair/Replacement	Each						#DIV/0!
18	Thermostat-controlled Shower Valve	Each						#DIV/0!
19	New - Combined Showerhead/TSV	Each						#DIV/0!
20	New - Heat Pump Water Heater	Each						#DIV/0!
21	New - Tub Diverter/ Tub Spout	Each						#DIV/0!
22	Enclosure							
23	Air Sealing / Envelope [1]	Home						#DIV/0!
24	Attic Insulation	Home						#DIV/0!
25	HVAC							
26	FAU Standing Pilot Conversion	Each						#DIV/0!
27	Furnace Repair/Replacement	Each						#DIV/0!
28	Room A/C Replacement	Each						#DIV/0!
29	Central A/C replacement	Each						#DIV/0!
30	Heat Pump Replacement	Each						#DIV/0!
31	Evaporative Cooler (Replacement)	Each						#DIV/0!
32	Duct Testing and Sealing	Home						#DIV/0!
33	New - Energy Efficient Fan Control	Home						#DIV/0!
34	New - Prescriptive Duct Sealing	Home						#DIV/0!
35	New - High Efficiency Forced Air Unit (HE FAU)	Home						#DIV/0!
36	Maintenance							
37	Furnace Clean and Tune	Home						#DIV/0!
38	Central A/C Tune up	Home						#DIV/0!
39	Lighting							
40	Compact Fluorescent Lights (CFL)	Each						#DIV/0!
41	Interior Hard wired CFL fixtures	Each						#DIV/0!
42	Exterior Hard wired CFL fixtures	Each						#DIV/0!
43	Torchiere (CFL)	Each						#DIV/0!
44	Interior Hard wired LED fixtures	Each						#DIV/0!
45	Exterior Hard wired LED fixtures	Each						#DIV/0!
46	LED Torchiere	Each						#DIV/0!
47	Vacancy Sensor	Each						#DIV/0!
48	LED Night Lights	Each						#DIV/0!
49	New - LED Diffuse Bulb (60W Replacement)	Each						#DIV/0!
50	New - LED Reflector Bulb	Each						#DIV/0!
51	New - LED Reflector Downlight Retrofit Kits	Each						#DIV/0!
52	New - LED A-Lamps	Each						#DIV/0!
53	Miscellaneous							
54	Pool Pumps	Each						#DIV/0!
55	Smart Power Strips - Tier 1	Each						#DIV/0!
56	New - Smart Power Strips - Tier 2	Each						#DIV/0!
57	Pilots							
58								
59	Customer Enrollment							
60	Outreach & Assessment	Home					\$ -	#DIV/0!
61	In-Home Education	Home					\$ -	#DIV/0!
62								
63	Total Savings/Expenditures			-	-	-	\$ -	#DIV/0!
64								
65	Total Households Weatherized [2]							
66								
67	CSD MF Buildings Treated					Total		
68								
69	- Multifamily							
70								
71								
72	[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking							
73	minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.							
74	[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.							
75	[3] All savings are calculated based on the following sources:							
76	Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013							
77	[4] Microwave savings are from ECONorthWest Studies received in December of 2011.							
78	[5] Evergreen Economics "Impact Evaluation of the 2009 CA Low Income Energy Efficiency Program, Final Report." June 16, 2011							
79	[6] LIWP leveraging will begin in 2018. PG&E is working with CSD on the process to leverage funding for CSD LIWP efforts for those measures provided by the ESA Program, preserving the remaining CSD funding for use to install central systems and common area., as required by D.17-12-009, OP.41.d.							

	A	B	C	D	E	F	G	H
1	ESA Table 2B - MF CAM Measure Installations and Savings							
2	Pacific Gas and Electric Company							
3	Program Year 2017							
4								
5								
6	*ESA Program - Multifamily Common Area [8]							
7	Measures	Units	Quantity Installed	kWh [3] (Annual)	kW [3] (Annual)	Therms [3] (Annual)	Expenses (\$)	% of Expenditure
8	Appliances							
9	High Efficiency Clothes Washer	Each						#DIV/0!
10	Refrigerators	Each						#DIV/0!
11	Microwaves [4]	Each						#DIV/0!
12	Domestic Hot Water							
13	Water Heater Blanket [5]	Home						#DIV/0!
14	Low Flow Shower Head [5]	Home						#DIV/0!
15	Water Heater Pipe Insulation [5]	Home						#DIV/0!
16	Faucet Aerator [5]	Home						#DIV/0!
17	Water Heater Repair/Replacement	Each						#DIV/0!
18	Thermostat-controlled Shower Valve	Each						#DIV/0!
19	New - Combined Showerhead/TSV	Each						#DIV/0!
20	New - Heat Pump Water Heater	Each						#DIV/0!
21	New - Tub Diverter/ Tub Spout	Each						#DIV/0!
22	Enclosure							
23	Air Sealing / Envelope [1]	Home						#DIV/0!
24	Attic Insulation	Home						#DIV/0!
25	HVAC							
26	FAU Standing Pilot Conversion	Each						#DIV/0!
27	Furnace Repair/Replacement	Each						#DIV/0!
28	Room A/C Replacement	Each						#DIV/0!
29	Central A/C replacement	Each						#DIV/0!
30	Heat Pump Replacement	Each						#DIV/0!
31	Evaporative Cooler (Replacement)	Each						#DIV/0!
32	Duct Testing and Sealing	Home						#DIV/0!
33	New - Energy Efficient Fan Control	Home						#DIV/0!
34	New - Prescriptive Duct Sealing	Home						#DIV/0!
35	New - High Efficiency Forced Air Unit (HE FAU)	Home						#DIV/0!
36	Maintenance							
37	Furnace Clean and Tune	Home						#DIV/0!
38	Central A/C Tune up	Home						#DIV/0!
39	Lighting							
40	Compact Fluorescent Lights (CFL)	Each						#DIV/0!
41	Interior Hard wired CFL fixtures	Each						#DIV/0!
42	Exterior Hard wired CFL fixtures	Each						#DIV/0!
43	Torchiere (CFL)	Each						#DIV/0!
44	Interior Hard wired LED fixtures	Each						#DIV/0!
45	Exterior Hard wired LED fixtures	Each						#DIV/0!
46	LED Torchiere	Each						#DIV/0!
47	Vacancy Sensor	Each						#DIV/0!
48	LED Night Lights	Each						#DIV/0!
49	New - LED Diffuse Bulb (60W Replacement)	Each						#DIV/0!
50	New - LED Reflector Bulb	Each						#DIV/0!
51	New - LED Reflector Downlight Retrofit Kits	Each						#DIV/0!
52	New - LED A-Lamps	Each						#DIV/0!
53	Miscellaneous							
54	Pool Pumps	Each						#DIV/0!
55	Smart Power Strips - Tier 1	Each						#DIV/0!
56	New - Smart Power Strips - Tier 2	Each						#DIV/0!
57	Ancillary Services							
58	Commissioning [6]	Home						#DIV/0!
59	Audit	Home						#DIV/0!
60	Administration [7]	Home						#DIV/0!
61	Pilots							
62								
63	Customer Enrollment							
64	Outreach & Assessment	Home					\$ -	#DIV/0!
65	In-Home Education	Home					\$ -	#DIV/0!
66								
67	Total Savings/Expenditures			-	-	-	\$ -	#DIV/0!
68								
69	Total Multifamily Buildings Weatherized [2]							
70								
71	Multifamily Buildings Treated	Total						
72								
73	- Multifamily							
74								
75	<p>[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.</p> <p>[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.</p> <p>[3] Unless otherwise indicated, all savings are calculated based on the following sources: Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013</p> <p>[4] Microwave savings are from ECONorthWest Studies received in December of 2011.</p> <p>[5] Evergreen Economics "Impact Evaluation of the 2009 CA Low Income Energy Efficiency Program, Final Report." June 16, 2011</p> <p>[6] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.</p> <p>[7] Per D.16-11-022 at p.210, the CPUC imposes a cap of 10% of ESA Program funds for administrative activities and a ceiling of 20% for direct implementation non-incentive costs.</p> <p>[8] Implementation of the MF CAM Initiative is pending approval of PG&E's March 1, 2018</p> <p>* Note: Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are income eligible based on CPUC income requirements of at or below 200% of the Federal Poverty Guidelines.</p>							

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	A	B	C	D	E
1	ESA Table 3 - Program Cost Effectiveness Pacific Gas and Electric Company Program Year 2017				
2					
3					
4	Ratio of Benefits Over Costs			Net Benefits (\$ in Millions)	
5	ProgramYear	ESACET	Resource TRC	ESACET	ResourceTRC
6	2017	1.03	0.81	3.87	(15.41)
7	Notes: - All program measures "resource and non-resource measures" are included in the ESACET. Only measures considered "resource measures" (measures with savings in kWh/Therms) are included in the Resource TRC. - The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs. - The Resource TRC includes energy benefits and program measure and installation costs, and does not include administration costs. - D.14-08-030 Ordering Paragraph 34 adopted the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report, except as indicated in ESA Table 2. - D.14-08-030, Ordering Paragraph 43 directs the application of the two new cost effectiveness tests, ESACET and Resource Measure TRC.				
8					
9					
10					
11					
12					
13					

	A	B	C	D	E	F	G
	ESA Table 4 - Detail by Housing Type and Source [*]						
	Pacific Gas and Electric Company						
	Program Year 2017						
1							
2							
3			Table 4A - 2017 Energy Savings¹				
4	Customer	Housing Type	# Homes Treated	(MWh)	MW	(MM Therm)	2017 Expenses
5	Gas and Electric Customers						
6	Owners - Total		32,129	25.939	32.426	0.809	\$ 38,785,715
7		Single Family	27,471	23.440	29.072	0.724	\$ 35,165,794
8		Multi Family	511	0.189	0.215	0.006	\$ 371,086
9		Mobile Homes	4,147	2.310	3.139	0.079	\$ 3,248,834
10	Renters - Total		30,941	17.688	19.355	0.613	\$ 28,444,415
11		Single Family	19,600	13.058	14.255	0.459	\$ 20,338,398
12		Multi Family	10,979	4.445	4.897	0.148	\$ 7,814,839
13		Mobile Homes	362	0.185	0.204	0.007	\$ 291,179
14	Electric Customers (only)						
15	Owners - Total		10,270	10.483	12.573	0.008	\$ 8,417,825
16		Single Family	8,712	9.531	11.457	0.008	\$ 7,561,455
17		Multi Family	161	0.110	0.105	-	\$ 132,472
18		Mobile Homes	1,397	0.842	1.011	0.000	\$ 723,898
19	Renters - Total		6,839	5.138	5.017	0.004	\$ 5,170,205
20		Single Family	4,117	3.579	3.657	0.004	\$ 3,499,836
21		Multi Family	2,208	1.236	1.052	0.000	\$ 1,317,405
22		Mobile Homes	514	0.323	0.308	0.000	\$ 352,965
23	Gas Customers (only)						
24	Owners - Total		4,131	0.031	0.126	0.141	\$ 3,272,114
25		Single Family	3,762	0.038	0.126	0.132	\$ 3,096,919
26		Multi Family	44	(0.001)	-	0.001	\$ 18,574
27		Mobile Homes	325	(0.006)	0.000	0.008	\$ 156,621
28	Renters - Total		2,742	(0.016)	0.053	0.076	\$ 1,615,919
29		Single Family	2,080	0.003	0.052	0.064	\$ 1,328,000
30		Multi Family	634	(0.019)	0.001	0.012	\$ 276,265
31		Mobile Homes	28	(0.000)	0.000	0.001	\$ 11,654
32	Gas and Electric Total						
33	Multifamily Common Area Bldgs - Total						
34							
35	Totals:		87,052	59.263	69.550	1.651	\$ 85,706,194
36							
37	* Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.						
38							
39							
40	Tables 4B - Penetration History						
41	Year	Homes Treated¹	Ineligible & Unwilling²	Estimated Eligible in Current Year³	Current year Penetration Rate for Homes Treated⁴		
42	2002	70,683					
43	2003	47,271					
44	2004	48,456					
45	2005	57,700					
46	2006	66,043					
47	2007	63,319					
48	2008	61,034					
49	2009	81,308					
50	2010	133,329					
51	2011	128,071					
52	2012	115,229					
53	2013	123,566					
54	2014	123,539					
55	2015	100,573					
56	2016	74,319					
57	2017	51,442	705,035	1,762,588	1.3%		
58	2018						
59	2019						
60	2020						
61	Total Homes Treated since 2002	1,345,882	705,035	1,762,588	1.3%		
62							
63	¹ Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative. Beginning in 2017, IOUs were allowed to re-treat customer homes that had been treated by the ESA Program since 2002, although these homes do not count toward the 2020 goal. This cumulative total includes only the 51,442 First Touch homes treated by PG&E in 2017 . Additionally, this total does not include the homes treated by CSD's LIHEAP program that are allowed to count towards PG&E's 2020 goal.						
64	² Customers that were ineligible, unwilling, or infeasible to participate. Estimate is 40% of the total eligible population, based on the 60% remaining Willing and Feasible to Participate (WFTP) factor authorized in D.16-11-022 and D.17-12-009 for the 2017-2020 cycle. Per the Commission authorized methodology, the WFTP factor is applied to the escalated 2020 estimated eligible population. On this table, there is no escalation, and it is applied to the 2017 estimated eligible population, updated annually by Athens Research from census data.						
65	³ Based on Attachment F of D.12-08-044, D.14-08-030, and Ordering Paragraph 79 of D.16-11-022. Total eligibility shown in this column does not deduct homes treated by CSD's LIHEAP program, as authorized by the Commission.						
66	⁴ Penetration is percent of customers treated (Column B) relative to the total eligible customers (Column D) less the unwilling/ineligible customers (Column C): B/(D-C) . This calculation is consistent with PG&E's methodology for estimating customers willingness / unwillingness to participate as authorized by the Commission, except that it is not applied to an escalated estimated 2020 eligibility. PG&E plans to update WFTP forecasts in its Mid-Cycle Update Advice Letter in July 2018.						
67							
68							
69	Table 4C - Households in Shared Service Territory						
70	Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory			
71							
72	2017	SCE	4,997	8			
73	2017	SoCalGas	104,440	2,706			
74							
75							
76							
77							
78	[*] Summary data which includes ESA Program, CSD Leveraging, and MF efforts.						

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	A	B	C	D	E	F	G
1	ESA Table 5 - ESA Direct Purchases & Installation Contractors Pacific Gas and Electric Company Program Year 2017						
2	Contractor	County	Contractor Type (Check one or more if applicable)				2017 Annual Expenditures
3			Private	CBO	WMDVBE	LIHEAP	
4	AE3V dba Western Heating and Cooling	Alameda, Contra Costa, Fresno, Kern, Kings, Madera, Marin, Merced, Monterey, Napa, Sacramento, San Benito, San Joaquin, San Luis Obispo, Santa Barbara, Santa Clara, Santa Cruz, Solano, Sonoma, Stanislaus, Tulare, Yolo, Butte, Colusa, Glenn, Shasta, Sutter, Tehama, Yuba	X				\$ 1,419,312
5	Lovotti Inc- AC Tune Up	Alameda, Alpine, Amador, Butte, Calaveras, Colusa, Contra Costa, El Dorado, Fresno, Glenn, Humboldt, Kern, Kings, Lake, Lassen, Madera, Marin, Mariposa, Mendocino, Merced, Monterey, Napa, Nevada, Placer, Plumas, Sacramento, San Benito, San Bernardino, San Francisco, San Joaquin, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Sierra, Siskiyou, Solano, Sonoma, Stanislaus, Sutter, Tehama, Trinity, Tulare, Tuolumne, Yolo, Yuba	X				\$ 1,419,304
6	Amador-Tuolumne Community Action Agency	Amador, Tuolumne, Calaveras		X		X	\$ 1,600
7	Central Coast Energy Services	Monterey, San Benito, Santa Cruz, San Mateo		X		X	\$ 12,800
8	Redwood Community Action Agency	Humboldt		X		X	\$ 6,400
9	San Joaquin Human Services Agency	San Joaquin		X		X	\$ -
10	American Insulation, Inc.	Merced San Joaquin			x		\$ 2,419,297
11	Bright Ideas Construction	Fresno Madera Mariposa Merced Stanislaus Tuolumne	x				\$ 4,383,077

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	A	B	C	D	E	F	G
1	ESA Table 5 - ESA Direct Purchases & Installation Contractors Pacific Gas and Electric Company Program Year 2017						
2	Contractor	County	Contractor Type (Check one or more if applicable)				2017 Annual Expenditures
3			Private	CBO	WMDVBE	LIHEAP	
		Alameda Contra Costa Marin Napa San Francisco San Benito San Mateo Santa Clara Amador Calaveras San Joaquin Stanislaus Tuolumne Alpine Butte Colusa El Dorado Glenn Humboldt Lake Lassen Mendocino Nevada Placer Plumas Sacramento Shasta Sierra					
12	California Builder Appliances, Inc. dba Monark of California	Siskiyou Solano	x				\$ 3,899,638
13	CarrollCo, Inc.	Fresno Humboldt Siskiyou Trinity				x	\$ 5,067,416
14	Community Action Agency of Butte County, Inc.	Butte Glenn Sutter Yuba		x		x	\$ 832,884
15	Community Action Partnership of San Luis Obispo, Inc.	Monterey San Luis Obispo Santa Barbara Santa Cruz		x	x	x	\$ 907,415
16	Community Energy Services Corporation	Alameda Contra Costa Marin		x		x	\$ 366,465
17	Community Housing Opportunities Corporation	Sacramento Contra Costa Napa Solano		x			\$ 4,087,213
18	CWES, Inc.	Fresno			x		\$ 2,203,518
19	El Concilio of San Mateo County, Inc.	San Mateo Santa Clara		x		x	\$ 1,291,857
20	Energy Efficiency, Inc. dba Synergy EE	Santa Clara San Mateo Alameda Contra Costa San Francisco Marin			x		\$ 9,432,308
21	Fresno County Economic Opportunities Commission	Fresno		x	x	x	\$ 2,226,938

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	A	B	C	D	E	F	G
1	ESA Table 5 - ESA Direct Purchases & Installation Contractors Pacific Gas and Electric Company Program Year 2017						
2	Contractor	County	Contractor Type (Check one or more if applicable)				2017 Annual Expenditures
3			Private	CBO	WMDVBE	LIHEAP	
22	Highlands Diversified, Inc. dba dba Highlands Trade Partners	Calaveras Fresno Kern Kings Madera Merced San Joaquin Stanislaus Tulare Tuolumne			x		\$ 12,937,841
23	TruTeam of California	Merced Sacramento San Joaquin Solano Stanislaus Yolo	x				\$ 346,760
24	Pacific Coast Energy Conservation Services	Kern San Luis Obispo Monterey	x				\$ 3,313,722
25	Polvera Drywall of Riverside Corporation dba Empire Insulation	Sacramento Yolo San Luis Obispo Santa Barbara			x		\$ 4,247,094
26	Project Go Incorporated	El Dorado Nevada Placer Sacramento		x			\$ 284,254
27	Proteus	Fresno Kings Tulare Kern		x			\$ 224,883
28	Quality Conservation Services Inc.	Solano Santa Clara Alameda Contra Costa San Francisco	x				\$ 8,270,382
29	Residential Weatherization Inc.	Butte Colusa Glenn Lake Lassen Mendocino Nevada Placer Plumas Sacramento Shasta Sutter Tehama Yolo Yuba Marin Napa San Francisco			x		\$ 3,473,663
30	Salvador F. Calderon dba Salco Better Energy	Butte Glenn Mendocino Shasta Sonoma Tehama	x				\$ 2,551,295
31	Self- Help Home Improvement	Shasta Tehama		x		x	\$ 1,004,715

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	A	B	C	D	E	F	G
1	ESA Table 5 - ESA Direct Purchases & Installation Contractors						
2	Pacific Gas and Electric Company						
3	Program Year 2017						
	Contractor	County	Contractor Type (Check one or more if applicable)				2017 Annual Expenditures
			Private	CBO	WMDVBE	LIHEAP	
32	Sierra Weatherization Compnay Inc. dba Bo Enterprises	Santa Clara Santa Cruz Alameda	x				\$ 3,069,650
33	Silicon Valley Foundation, Inc.	Santa Clara			x		\$ 1,676,666
34	Staples & Associates, Inc.	Amador Calaveras Kern Kings San Joaquin El Dorado Nevada Placer Sacramento Yuba Monterey Santa Cruz San Luis Obispo	x				\$ 11,209,606
35	Sundowner Insulation Company, Inc.	San Joaquin Stanislaus Monterey San Luis Obispo	x				\$ 556,730
36	Ventura TV	Fresno Kern Kings Madera Mariposa Merced Monterey San Benito San Bernardino San Luis Obispo Santa Barbara Santa Cruz Tulare	x				\$ 3,449,768
37	Winegard Energy, Inc.	Fresno Kern Kings Madera Tulare	x				\$ 4,952,649
38	Action AC (ROY SAKAMOTO)		x				\$ 408,600
39	Barker		x				\$ 1,249,441
40	Empire		x				\$ 905,054
41	Lovotti		x				\$ 803,724
42	Masco (TRU TEAM OF CALIFORNIA INC)		x				\$ 46,334
43	Total						\$ 104,960,271

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	ESA Table 6 - ESA Installation Cost of Program Installation Contractors Pacific Gas and Electric Company Program Year 2017																		
2		Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2017 Program Total				
3			Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Household	Costs	Cost/ Unit	Cost/ Household
4			Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
5	Dwellings	Each	709,646	49%	-	0%	\$ 38,007,036	44%	739,612	51%	-	0%	\$ 47,699,158	56%	1,449,258	-	\$ 85,706,194	\$ 59.14	
6	Appliances																		
7	High Efficiency Clothes Washer	Each	-	0%	-	0%	-	0%	8,728	100%	8,708	100%	\$ 7,584,519	100%	-	-	\$ -	\$ -	\$ -
8	Refrigerators	Each	-	0%	-	0%	-	0%	-	-	-	-	\$ 6,928	-	-	-	\$ 7,584,519	\$ 869	\$ 871
9	Microwaves	Each	9,791	49%	9,778	49%	\$ 890,561	49%	10,029	51%	10,022	51%	\$ 912,209	51%	19,820	19,800	\$ 1,802,769	\$ 91	\$ 91
10	Domestic Hot Water																		
11	Water Heater Blanket	Home	6,425	56%	6,308	56%	\$ 494,489	56%	5,097	44%	5,056	44%	\$ 392,282	44%	11,522	11,364	\$ 886,770	\$ 77	\$ 78
12	Low Flow Shower Head	Home	44,538	51%	30,142	51%	\$ 1,351,266	51%	42,251	49%	28,930	49%	\$ 1,281,879	49%	86,789	59,072	\$ 2,633,146	\$ 30	\$ 45
13	Water Heater Pipe Insulation	Home	519	64%	519	64%	\$ 12,399	64%	290	36%	290	36%	\$ 6,928	36%	809	809	\$ 19,327	\$ 24	\$ 24
14	Faucet Aerator	Home	29,318	54%	29,318	54%	\$ 464,785	54%	25,028	46%	25,028	46%	\$ 396,774	46%	54,346	54,346	\$ 861,559	\$ 16	\$ 16
15	Water heater Repair/Replacement	Each	-	0%	-	0%	-	0%	869	100%	869	100%	\$ 1,075,024	100%	869	869	\$ 1,075,024	\$ 1,237	\$ 1,237
16	Thermostat-controlled Shower Valve	Each	28,529	50%	18,881	50%	\$ 820,349	50%	28,549	50%	19,237	50%	\$ 820,925	50%	57,078	38,118	\$ 1,641,274	\$ 29	\$ 43
17	New - Combined Showerhead/TSV	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
18	New - Heat Pump Water Heater	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
19	New Tub Diverter/ Tub Spout	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
20	Enclosure																		
21	Air Sealing / Envelope [1]	Home	28,722	54%	28,722	54%	\$ 12,560,357	54%	24,447	46%	24,447	46%	\$ 10,690,866	46%	53,169	53,169	\$ 23,251,223	\$ 437	\$ 437
22	Attic Insulation	Home	2,678	67%	2,678	67%	\$ 4,103,474	67%	1,340	33%	1,340	33%	\$ 2,053,269	33%	4,018	4,018	\$ 6,156,744	\$ 1,532	\$ 1,532
23	HVAC																		
24	FAU Standing Pilot Light Conversion	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
25	Furnace Repair/Replacement	Each	-	0%	-	0%	-	0%	1,112	100%	1,112	100%	\$ 2,260,979	100%	1,112	1,112	\$ 2,260,979	\$ 2,033	\$ 2,033
26	Room A/C Replacement	Each	1,482	61%	1,141	59%	\$ 1,029,254	61%	955	39%	798	41%	\$ 663,251	39%	2,437	1,939	\$ 1,692,505	\$ 695	\$ 873
27	Central A/C Replacement	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
28	Heat Pump Replacement	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
29	Evaporative Coolers (Replacement)	Each	2,330	60%	1,941	58%	\$ 1,353,601	60%	1,568	40%	1,433	42%	\$ 910,921	40%	3,898	3,374	\$ 2,264,523	\$ 581	\$ 671
30	Duct Testing and Sealing	Home	1,183	53%	1,183	53%	\$ 926,518	53%	1,064	47%	1,064	47%	\$ 833,318	47%	2,247	2,247	\$ 1,759,835	\$ 783	\$ 783
31	New - Energy Efficient Fan Control	Home	-	0%	-	0%	-	0%	5,784	100%	5,637	100%	\$ 452,889	100%	5,784	5,637	\$ 452,889	\$ 78	\$ 80
32	New - Prescriptive Duct Sealing	Home	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
33	New - High Efficiency Forced Air Unit	Home	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
34	Maintenance																		
35	Furnace Clean and Tune	Home	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
36	Central A/C Tune-up	Home	-	0%	-	0%	-	0%	9,518	100%	9,518	100%	\$ 2,312,938	100%	9,518	9,518	\$ 2,312,938	\$ 243	\$ 243
37	Lighting																		
38	Compact Fluorescent Lights (CFL)	Each	67,593	50%	9,039	51%	\$ 541,057	50%	66,663	50%	8,645	49%	\$ 533,613	50%	134,256	17,684	\$ 1,074,671	\$ 8	\$ 61
39	Interior Hard wired CFL fixtures	Each	26,690	48%	6,799	49%	\$ 2,220,203	48%	28,351	52%	7,064	51%	\$ 2,358,373	52%	55,041	13,863	\$ 4,578,576	\$ 83	\$ 330
40	Exterior Hard wired CFL fixtures	Each	6,513	48%	3,210	49%	\$ 552,935	48%	7,004	52%	3,395	51%	\$ 594,620	52%	13,517	6,605	\$ 1,147,555	\$ 85	\$ 174
41	Torchiere (CFL)	Each	2,642	49%	2,355	47%	\$ 206,963	49%	2,792	51%	2,651	53%	\$ 218,713	51%	5,434	5,006	\$ 425,677	\$ 78	\$ 85
42	Interior Hard wired LED fixtures	Each	92,782	48%	29,863	50%	\$ 4,832,707	48%	100,823	52%	29,780	50%	\$ 5,251,536	52%	193,605	59,643	\$ 10,084,243	\$ 52	\$ 169
43	Exterior Hard wired LED fixtures	Each	22,153	45%	9,775	47%	\$ 1,372,648	45%	27,171	55%	11,042	53%	\$ 1,683,574	55%	49,324	20,817	\$ 3,056,222	\$ 62	\$ 147
44	Torchiere (LED)	Each	7,225	50%	5,029	45%	\$ 405,524	50%	7,326	50%	6,213	55%	\$ 411,192	50%	14,551	11,242	\$ 816,716	\$ 56	\$ 73
45	Vacancy Sensor	Each	1,180	62%	856	62%	\$ 73,062	62%	732	38%	531	38%	\$ 45,323	38%	1,912	1,387	\$ 118,386	\$ 62	\$ 85
46	LED Night Lights	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
47	New - LED Diffuse Bulb (60W Replac	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
48	New - LED Reflector Bulb	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
49	New - LED Reflector Downlight Retrof	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
50	New - LED A-Lamps	Each	311,295	50%	26,690	50%	\$ 2,957,142	50%	312,736	50%	26,298	50%	\$ 2,970,831	50%	624,031	52,988	\$ 5,927,973	\$ 9	\$ 112
51	Miscellaneous																		
52	Pool Pumps	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -
53	Smart Power Strips	Each	8,497	43%	6,199	43%	\$ 336,675	43%	11,342	57%	8,369	57%	\$ 449,402	57%	19,839	14,568	\$ 788,077	\$ 40	\$ 54
54	New - Smart Power Strips - Tier 2	Each	7,561	48%	4,063	50%	\$ 501,066	48%	8,043	52%	3,983	50%	\$ 533,008	52%	15,604	8,046	\$ 1,034,074	\$ 66	\$ 129
55	Ancillary Services																		
56	Commissioning [2]	Home	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
57	Audit	Home	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
58	Administration [3]	Home	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
59	Pilots																		
60		Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
61		Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	\$ -	\$ -	\$ -
62	Customer Enrollment																		
63	Outreach & Assessment	Home	-	-	-	-	-	-	-	-	-	-	-	-	87,052	87,052	\$ 10,321,232	\$ 119	\$ 119
64	In-Home Education	Home	-	-	-	-	-	-	-	-	-	-	-	-	87,052	87,052	\$ 5,107,981	\$ 59	\$ 59
65																			
66																			
67	[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.																		
68	[2] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.																		
69	[3] Per D.16-11-022 at p.210, the CPUC imposes a cap of 10% of ESA Program funds for administrative activities and a ceiling of 20% for direct implementation non-incentive costs.																		
70																			
71																			

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	A	B	C	D	E
1	ESA Table 7 - Expenditures Recorded by Cost Element Pacific Gas and Electric Company Program Year 2017				
2	ESA Program:	Labor [1]	Non-Labor [2]	Contractor [3]	Total
3	Energy Efficiency				
4	Appliances	\$ -	\$ -	\$ 11,753,330	\$ 11,753,330
5	Domestic Hot Water	\$ -	\$ -	\$ 7,444,784	\$ 7,444,784
6	Enclosure	\$ -	\$ -	\$ 30,731,534	\$ 30,731,534
7	HVAC	\$ -	\$ -	\$ 10,989,587	\$ 10,989,587
8	Maintenance	\$ -	\$ -	\$ -	\$ -
9	Lighting	\$ -	\$ -	\$ 27,905,424	\$ 27,905,424
10	Miscellaneous	\$ -	\$ -	\$ -	\$ -
11	Customer Enrollment	\$ -	\$ -	\$ 10,354,662	\$ 10,354,662
12	In Home Education	\$ -	\$ -	\$ 5,419,707	\$ 5,419,707
13	Pilot	\$ -	\$ -	\$ -	\$ -
14	Implementation [4]	\$ -	\$ -	\$ 5,369,134	\$ 5,369,134
15	Energy Efficiency TOTAL	\$ -	\$ -	\$ 109,968,163	\$ 109,968,163
16					
17	Training Center	\$ 238,318	\$ 13,385	\$ 129,676	\$ 381,378
18	Inspections	\$ 3,918,873	\$ 18,408	\$ 3,720	\$ 3,941,001
19	Marketing and Outreach	\$ 307,533	\$ 151,577	\$ 1,078,969	\$ 1,538,079
20	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
21	Measurement and Evaluation Studies	\$ -	\$ -	\$ 56,824	\$ 56,824
22	Regulatory Compliance	\$ 347,214	\$ 35,166	\$ -	\$ 382,380
23	General Administration	\$ 5,930,912	\$ 108,525	\$ 993,077	\$ 7,032,514
24	CPUC Energy Division	\$ -	\$ 60,159	\$ -	\$ 60,159
25	Multi-Family Common Area Measures	\$ 45,323	\$ -	\$ -	\$ 45,323
26	Leveraging - CSD and MCE [4]	\$ -	\$ 1,750,000	\$ -	\$ 1,750,000
27					
28	TOTAL PROGRAM COSTS	\$ 10,788,173	\$ 2,137,220	\$ 112,230,428	\$ 125,155,822
29					
30	[1] Labor costs include any internal direct (administrative and/or implementation) costs (indirect costs are a separate line item), burdened by overhead, that represents person hours.				
31	[2] Non-Labor costs include all direct internal (administrative and/or implementation) costs (indirect costs are given as a separate line item) not covered under labor.				
32	[3] Contract costs include all outsourced costs (administrative and/or implementation). Contract costs do not need to be further broken out by labor/non-labor. This category includes agency employees.				
33	[4] This budget category includes the primary administrative fee for Implementer(s).				
34	Note: This table is consistent with costs reflected on ESA Table 1 and Table 1A, and includes total program costs from both authorized costs (shown in Table 1) and authorized costs from unspent funding (shown in Table 1A).				

	A	B	C	D	E	F	G	H
1	ESA Table 8 - ESA Homes Unwilling / Unable to Participate							
2	Pacific Gas and Electric Company							
3	Program Year 2017							
4	ESA Program	Reason Provided						
5	County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
6	ALAMEDA	23	1516	3	1	20	1	20
7	ALPINE	0		0	0	0	0	0
8	AMADOR	40	112	0	0	0	0	1
9	BUTTE	83	1594	5	2	21	1	71
10	CALAVERAS	16	101	1	0	1	0	0
11	COLUSA	1	169	0	0	7	0	8
12	CONTRA COSTA	164	2191	1	0	20	6	59
13	EL DORADO	91	243	0	0	2	0	4
14	FRESNO	259	3642	6	2	63	3	69
15	GLENN	9	225	1	0	0	0	1
16	HUMBOLDT	4	120	2	0	15	0	3
17	KERN	109	3108	2	2	14	0	30
18	KINGS	2	236	0	0	1	0	8
19	LAKE	5	77	0	0	0	0	2
20	LASSEN	0	4	0	0	0	0	0
21	MADERA	25	404	0	0	5	0	8
22	MARIN	6	169	1	0	0	2	0
23	MARIPOSA	4	14	0	0	0	0	0
24	MENDOCINO	0	49	1	0	0	0	0
25	MERCED	18	809	1	0	9	0	33
26	MONTEREY	94	966	0	0	14	0	146
27	NAPA	3	408	0	0	45	0	0
28	NEVADA	74	211	0	0	5	0	4
29	PLACER	138	352	2	0	10	1	36
30	PLUMAS	0	29	0	0	0	0	0
31	SACRAMENTO	276	956	3	1	14	3	8
32	SAN BENITO	5	179	0	0	1	0	3
33	SAN BERNARDINO	0	0	0	0	0	0	0
34	SAN FRANCISCO	14	1316	3	0	2	0	7
35	SAN JOAQUIN	206	2356	6	0	43	3	54
36	SAN LUIS OBISPO	31	263	1	0	0	1	1
37	SAN MATEO	43	812	0	0	6	0	7
38	SANTA BARBARA	111	291	0	0	0	0	0
39	SANTA CLARA	30	2198	1	1	0	0	155
40	SANTA CRUZ	94	599	2	1	0	0	27
41	SHASTA	60	969	4	0	0	6	32
42	SIERRA	0	0	0	0	0	0	0
43	SISKIYOU	0	0	0	0	0	0	0
44	SOLANO	217	1693	5	2	20	0	15
45	SONOMA	13	646	2	2	59	0	61
46	STANISLAUS	103	832	1	0	27	2	9
47	SUTTER	13	435	2	0	2	1	2
48	TEHAMA	42	811	2	1	8	3	7
49	TRINITY	0	1	0	0	0	0	0
50	TULARE	0	345	0	0	0	0	8
51	TUOLUMNE	12	50	2	0	1	0	0
52	YOLO	63	1294	2	1	4	1	6
53	YUBA	18	533	0	0	1	0	0
54	Total	2,519	33,328	62	16	440	34	905
55								

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	A	B	C	D	E	F	G
1	ESA Table 9 - Life Cycle Bill Savings by Measure[1] Pacific Gas and Electric Company Program Year 2017						
2	Measure Description		2017 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2017 Total Measure Life Cycle Bill Savings
3	Appliances						
4	High Efficiency Clothes Washer	Each					\$ -
5	Refrigerators	Each	8,728	5,719,679.18	-	15	\$ 9,056,087.20
6	Microwaves [2]	Each	19,820	1,892,643.30	145,332.62	15	\$ 4,765,134.25
7	Domestic Hot Water						
8	Water Heater Blanket [3]	Home	11,522	55,402.35	65,882.10	5	\$ 363,919.62
9	Low Flow Shower Head [3]	Home	86,789	806,376.00	457,720.40	10	\$ 5,046,783.11
10	Water Heater Pipe Insulation [3]	Home	809	2,265.00	7,056.80	15	\$ 89,456.54
11	Faucet Aerator [3]	Home	54,346	111,004.80	159,601.16	5	\$ 866,569.14
12	Water Heater Repair/Replacement	Each	869	-	4,735.29	13	\$ 51,961.25
13	Thermostat-controlled Shower Valve	Each	57,078	10,279.00	99,102.00	8	\$ 751,139.76
14	New - Combined Showerhead/TSV	Each					\$ -
15	New - Heat Pump Water Heater	Each					\$ -
16	New Tub Diverter/ Tub Spout	Each					\$ -
17	Enclosure						
18	Air Sealing / Envelope	Home	53,169	272,458.26	470,687.12	7	\$ 3,381,986.61
19	Attic Insulation	Home	4,018	548,884.28	171,420.60	20	\$ 3,577,576.53
20	HVAC						
21	FAU Standing Pilot Light Conversion	Each					\$ -
22	Furnace Repair/Replacement	Each	1,112	0	3677.33	16	\$ 46,803.45
23	Room A/C Replacement	Each	2,437	483793.22	0	15	\$ 765,999.88
24	Central A/C Replacement	Each	-	-	-	18	\$ -
25	Heat Pump Replacement	Each					\$ -
26	Evaporative Coolers (Replacement)	Each	3,898	1,034,993.16	-	15	\$ 1,638,726.23
27	Duct Testing and Sealing	Home	2,247	115,523.23	66,012.61	25	\$ 1,360,503.76
28	New - Energy Efficient Fan Control	Home	5,784	1,095,456	-	10	\$ 1,278,527.04
29	New - Prescriptive Duct Sealing	Home					\$ -
30	New - High Efficiency Forced Air Unit (HE FAU)	Home					\$ -
31	Maintenance						
32	Furnace Clean and Tune	Home					\$ -
33	Central A/C Tune-up	Home	9,518	2,452,622.89	-	15	\$ 3,883,288.92
34	Lighting						
35	Compact Fluorescent Lights (CFL)	Each	134,256	2,148,096.00	-	8	\$ 2,090,276.27
36	Interior Hard wired CFL fixtures	Each	55,041	880,656.00	-	16	\$ 1,458,428.71
37	Exterior Hard wired CFL fixtures	Each	13,517	652,580.80	-	20	\$ 1,250,942.04
38	Torchiere (CFL)	Each	5,434	604,601.51	-	9	\$ 648,282.18
39	Interior Hard wired LED fixtures	Each	193,605	13,009,107.39	-	16	\$ 21,544,003.29
40	Exterior Hard wired LED fixtures	Each	49,324	511,3419.08	0	16	\$ 8,468,184.19
41	Torchiere (LED)	Each	14,551	991941.67	0	16	\$ 1,642,725.67
42	Vacancy Sensor	Each	1,912	205526.6497	0	8	\$ 199,994.54
43	LED Night Lights	Each					\$ -
44	New - LED Diffuse Bulb (60W Replacement)	Each					\$ -
45	New - LED Reflector Bulb	Each					\$ -
46	New - LED Reflector Downlight Retrofit Kits	Each					\$ -
47	New - LED A-Lamps	Each	624,031	18545447.66	0	16	\$ 30,712,574.93
48	Miscellaneous						
49	Pool Pumps	Each					\$ -
50	Smart Power Strips	Each	19,839	482087.7	0	5	\$ 312,321.58
51	New - Smart Power Strips - Tier 2	Each	15,604	2028520	0	5	\$ 1,314,181.16
52	Ancillary Services						
53	Commissioning [4]	Home					\$ -
54	Audit	Home					\$ -
55	Administration [5]	Home					\$ -
56	Pilots						
57							\$ -
58							
59	Total		1,449,258	59,263,365	1,651,228		\$ 106,566,378
60							
61	Total Homes Served By the Program		87,052				
62	Life Cycle Bill Savings Per Home	\$	1,224.17				

[1] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation (Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013). Unless otherwise noted, the results from that study were used in this Annual Report.

[2] For microwaves, the savings estimate comes from a separate analysis completed by Evergreen Economics. A reasonable estimate for the usage of the microwave, which would be shown as negative kWh, is not available at this time; however, we expect this to be addressed in the next impact evaluation.

[3] Energy savings are from: Evergreen Economics "Impact Evaluation of the 2009 CA Low Income Energy Efficiency Program, Final Report." June 16, 2011

[4] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.

[5] Per D.16-11-022 at p.210, the CPUC imposes a cap of 10% of ESA Program funds for administrative activities and a ceiling of 20% for direct implementation non-incentive costs.

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	A	B	C
1	ESA Table 10 - Energy Rate Used for Bill Savings Calculations[1]		
	Pacific Gas and Electric Company		
	Program Year 2017		
2	Year	\$/kWh	\$/Therm
3			
4	2017	0.1413	1.0858
5	2018	0.1455	1.1184
6	2019	0.1499	1.1519
7	2020	0.1544	1.1865
8	2021	0.1590	1.2221
9	2022	0.1638	1.2588
10	2023	0.1687	1.2965
11	2024	0.1738	1.3354
12	2025	0.1790	1.3755
13	2026	0.1843	1.4167
14	2027	0.1899	1.4592
15	2028	0.1956	1.5030
16	2029	0.2014	1.5481
17	2030	0.2075	1.5946
18	2031	0.2137	1.6424
19	2032	0.2201	1.6917
20	2033	0.2267	1.7424
21	2034	0.2335	1.7947
22	2035	0.2405	1.8485
23	2036	0.2477	1.9040
24	2037	0.2552	1.9611
25	2038	0.2628	2.0199
26	2039	0.2707	2.0805
27	2040	0.2788	2.1430
28	2041	0.2872	2.2072
29			
30	[1] For 2017, the average cost per kWh and therm paid by ESA participants is shown. Cost is escalated 3% annually for remaining years.		

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	A	B	C	D	E
1	ESA Table 11 - Bill Savings Calculations by Program Year Pacific Gas and Electric Company Program Year 2017				
2	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
3	2011	\$ 145,900,978	\$ 58,889,388	0.40	\$ 460
4	2012	\$ 131,145,519	\$ 44,191,560	0.34	\$ 384
5	2013	\$ 142,181,389	\$ 54,007,801	0.38	\$ 437
6	2014	\$ 145,940,449	\$ 53,008,314	0.36	\$ 429
7	2015	\$ 136,775,345	\$ 63,956,471	0.47	\$ 636
8	2016	\$ 105,094,305	\$ 52,052,655	0.50	\$ 700
9	2017 *	\$ 122,778,059	\$ 106,566,378	0.87	\$ 1,224
10					
11	Increased bill savings due to larger numbers of LED and Smart power strip installations resulting from removal of measure caps in 2017. Also to decreased actual cost of LEDs in 2017 as compared to forecasted planning costs.				

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	A	B
1	ESA Table 13 - Categorical and Other Enrollment [1] Pacific Gas and Electric Company Program Year 2017	
2	Type of Enrollment	Number of Homes Treated
3	Women, Infants, and Children Program (WIC)	8,575
4	Supplemental Security Income (SSI)	6,074
5	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	3,691
6	CalWORKs/Temporary Assistance for Needy Families (TANF)	604
7	Tribal TANF	
8	Medicaid/Medi-Cal for Families	7,250
9	Healthy Families A&B	127
10	National School Lunch Program (NSLP) - Free Lunch	693
11	Low-income Home Energy Assistance Program (LIHEAP)	173
12	Bureau of Indian Affairs General Assistance	3
13	Head Start Income Eligible - (Tribal Only)	2
14	Targeted Self Certification	
15	Standard Enrollment	
16	Total	27,192
17		
18	Note: does not include MF common area efforts.	

	A	B	C	D	E	F	G	H	I	J	K	L
1	ESA Table 14 - Leveraging & Integration Pacific Gas and Electric Company Program Year 2017											
2	Coordination Type ¹	Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Savings ³	Other Measureable Benefits ⁴	Enrollments Resulting from Leveraging Effort ⁴	Methodology ⁵	Meets all Criteria	If not, Explain
3	Program Coordination	Amadore-Tuolumne Community Action Agency	Coordination with Southern California Gas	Yes	Yes	\$ -	Unknown	Unknown	Unknown	Unknown	N	Unknown amount of energy or dollar savings
4	Program Coordination	American Insulation	Coordination with SoCal Gas, Modesto Irrigation District and Turlock Irrigation District	Yes	Yes	\$ -	Unknown	15 customers referred to LIHEAP	107 into MID and TID, collectively	Unknown	N	Unknown amount of energy or dollar savings
5	Program Coordination	Bright Ideas Inc.	Coordination with LIHEAP and REACH	Yes	Yes	\$ -	Unknown	107 customers referred to LIHEAP, 140 to REACH	66 into LIHEAP, HEAP and REACH, collectively	Unknown	N	Unknown amount of energy or dollar savings
6	Leveraging	-- Central Coast Energy Services -- San Joaquin Human Services Agency	Through Refrigerator Leveraging Contracts with PG&E, LIHEAP agencies in PG&E's service area that are not ESA contractors can receive ESA Program funding to purchase refrigerators for qualified PG&E electric customers, thus freeing up more LIHEAP funding to provide other services to low income households. PG&E counts these refrigerators and their savings, but not the CSP "treated" home	Yes	Yes	\$ 21,000	20,000 kWh 4 kW	Unknown	26 ESA refrigerators provided to LIHEAP customers	Cost: PG&E provided 26 refrigerators Energy Savings: ESA refrigerator savings	Y	NA
7	Program Coordination	Community Action Agency of Butte County, Inc.	Coordination with SoCal Gas	Yes	Yes	\$ -	Unknown	Unknown	2 into LIHEAP	Unknown	N	Unknown amount of energy or dollar savings
8	Program Coordination	Community Action Partnership - San Luis Obispo	Coordination with Contra Costa Home Repair, Marin LIHEAP	Yes	Unknown	\$ -	Unknown	Unknown	0	Unknown	N	Unknown amount of energy or dollar savings
9	Program Coordination	Community Energy Services Co-partion	Coordination with LIHEAP, Medical Baseline	Yes	Unknown	\$ -	Unknown	9 customers referred to LIHEAP, 13 to Medical Baseline	16 into LIHEAP, Contra Costa Home Repair and Antioch Home Repair, collectively	Unknown	N	Unknown amount of energy or dollar savings
10	Program Coordination	El Concilio	Coordination with LIHEAP	Yes	Unknown	\$ -	Unknown	4 customers referred to LIHEAP	90 into CHANGES AND PMHR	Unknown	N	Unknown amount of energy or dollar savings
11	Program Coordination	Empire	Coordination with LIHEAP	Yes	Unknown	\$ -	Unknown	93 customers referred to LIHEAP	63 into SoCal Gas	Unknown	N	Unknown amount of energy or dollar savings
12	Program Coordination	Highlands Energy Services	Coordination with LIHEAP	Yes	Unknown	\$ -	Unknown	49 customers referred to LIHEAP	0	Unknown	N	Unknown amount of energy or dollar savings
13	Program Coordination	Pacific Coast Energy	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	2,483 customers referred to LIHEAP	0	Unknown	N	Unknown amount of energy or dollar savings
14	Program Coordination	Quality Conservation Services	Coordination with LIHEAP	Yes	Unknown	\$ -	Unknown	2 customers referred to LIHEAP	0	Unknown	N	Unknown amount of energy or dollar savings
15	Program Coordination	Residential Weatherization Services	Coordination with LIHEAP	Yes	Unknown	\$ -	Unknown	7 customers referred to LIHEAP	47 into Cal Am Water Program	Unknown	N	Unknown amount of energy or dollar savings
16	Program Coordination	Self Help Home Improvement	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	Unknown	29 customers enrolled into LIHEAP	Unknown	N	Unknown amount of energy or dollar savings
17	Program Coordination	Winegard Energy	Coordination with Southern California Edison	Yes	Yes	\$ -	Unknown	Unknown	44 into LIEE Gas Co	Unknown	N	Unknown amount of energy or dollar savings
18	Interdepartmental Integration	ESA Water Project w/ Cal Am Water	RHA is working in collaboration with ESA, water utilities and other stakeholders to develop a strategic leveraging plan that will provide for the integration of existing water conservation program offerings with the ESA Program offerings. The plan will address the shared cost associated with the following: - Co-funded energy-water savings measures - Water conservation education and collateral - Development of tools for residential water conservation audit and survey data collection - Development of a database to consolidate data collected and provide program reports - Contractor training	Yes	Yes	TBD	~7,583 kWh/yeat ~6.5 million gal	TBD	1,394 HHS rec'd water conservation education and multiple water measures	Unknown	N	Unknown amount of energy or dollar savings
19	Interdepartmental Integration	ESA/LGP MIDI Program	Telemarketing from their installed AC Tune-up customers, the ESA Energy Specialist will reach out to participating AC Tune-up customers introducing the SmartAC technology, answering any questions and, if successful, enrolling the customer in the SmartAC program. SmartAC technicians will then return to install the SmartAC device at the ESA customer's home.	No	No	\$ -	Unknown	Unknown	Unknown	Unknown	N	Unknown amount of energy or dollar savings
20	Interdepartmental Integration	IDSM ESA Program Coordination	Part of the Residential Integrated Campaign, the newsletter is sent out monthly to over 1.6MM residential customers. The goal of this effort is to go beyond a transactional one-time interaction with our customers in exchange for a continued dialogue about energy efficiency and management.	No	No	\$ -	Unknown	Unknown	Unknown	Unknown	N	Unknown amount of energy or dollar savings
21	Interdepartmental Integration	Residential Newsletter	To better link PG&E's ESA program and LGP offerings, this program will leverage ESA infrastructure to provide audit and installation services to hard-to-reach moderate income customers in regions of PG&E's service territory where the LGP program chooses to offer the ESA/LGP MIDI program.	No	No	\$ -	Unknown	Unknown	Unknown	Unknown	N	Unknown amount of energy or dollar savings
22	Interdepartmental Integration	SmartAC and ESA	ESA has worked with RHA's technical office to contact EUC MIDI and direct install lighting program managers to identify ways these programs may work with the ESA Program to better serve multifamily buildings.	No	No	\$ -	Unknown	Unknown	Unknown	Unknown	N	Unknown amount of energy or dollar savings
23	[1] Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.											
24	[2] Leveraging and integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).											
25	[3] Annual Energy savings/benefits for measures installation in 2017. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.											
26	[4] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.											
27	[5] Methodology used to calculate cost and/or resource savings.											
28	[6] Fields not applicable to specific efforts are marked "N/A"											

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	A	B	C	D	E	F
1	ESA Table 15 - Lighting (CFLs) [4]					
2	Pacific Gas and Electric Company					
3	Program Year 2017					
4	ESA Program CFL Tracking Table					
5	<i>CFL bulbs used within PG&EESA program</i>					
6	Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	Admin Cost (overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin) [1]	AB 1109 Compliant? [2]
7	CFL - Low	CFL - Low	\$2.20	\$5.28	\$7.48	Yes
8	CFL - Medium	CFL - Medium	\$2.44	\$5.28	\$7.72	Yes
9	CFL - High	CFL - High	\$2.65	\$5.28	\$7.93	Yes
10	Year	Number of Homes Treated in ESA Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs [3]	
11	2009	81,308	69,970	4.57	5.12	
12	2010	133,329	109,663	4.69	8.23	
13	2011	128,071	105,849	4.69	7.95	
14	2012	115,229	91,906	4.67	5.88	
15	2013	123,566	92,655	4.56	5.84	
16	2014	123,539	96,508	4.60	6.12	
17	2015	100,573	79,887	4.93	6.30	
18	2016	74,319	58,626	6.50	6.10	
19	2017	87,052	17,684	7.59	2.15	
20						
21	[1] Bulb cost and admin cost were combined effective 2013.					
22	[2] Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?					
23	Do all models comply with Europe's RoHS standards on toxicity?					
24	[3] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.					
25	[4] PG&E transitioned from CFLs to LEDs in 2017, and by mid-year was not installing any CFLs. This table does not include LEDs.					

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	A	B	C	D	E	F	G
1	ESA Table 16 - "Add Back" Measures Pacific Gas and Electric Company Program Year 2017						
2	Measure [1]	Climate Zone	Ratio of Benefits Over Costs		Quantity Installed	Budget Impact of "Add Back"	Lifecycle Bill Savings Impact
3			ESACET	Resource TRC			
4	Water Heater Blanket MF/CZ-All/Elec	System	0.00	0.00	150	\$11,544	\$8,022
5	Low Flow Shower Head MF/CZ-All/Elec	System	2.95	3.44	1679	\$50,940	\$121,179
6	Low Flow Shower Head MF/CZ-All/Gas	System	1.93	1.84	11149	\$338,256	\$7,267
7	Faucet Aerator MF/CZ-All/Elec	System	0.00	0.00	1646	\$26,094	\$105,053
8	Water Heater Pipe Insulation MF/CZ-All/Elec	System	0.00	0.00	70	\$1,672	\$2,464
9	AC TIME DELAY SF/CZ3	3A	0.35	0.31	6	\$470	\$20,871
10	AC TIME DELAY SF/CZ3	3B	0.35	0.30	55	\$4,307	\$55,336
11	HTG Sys Repair/Replace : GSH w/CZ2 w/MH	System	0.00	0.00	12	\$24,399	\$2,038
12	HTG Sys Repair/Replace : GSH w/CZ2 w/MH	System	0.00	0.00	1	\$2,033	\$427,111
13	HTG Sys Repair/Replace : GSH w/CZ2 w/SF	System	0.18	0.02	8	\$16,266	\$4,964
14	HTG Sys Repair/Replace : GSH w/CZ3 w/MF	System	0.00	0.00	1	\$2,033	\$2,828
15	HTG Sys Repair/Replace : GSH w/CZ3 w/MH	System	0.33	0.04	17	\$34,565	\$51
16	HTG Sys Repair/Replace : GSH w/CZ3 w/SF	System	0.16	0.02	193	\$392,418	\$6,243
17	HTG Sys Repair/Replace : GSH w/CZ4 w/MH	System	0.22	0.03	7	\$14,233	\$194
18	HTG Sys Repair/Replace : GSH w/CZ4 w/SF	System	0.13	0.02	68	\$138,261	\$58,208
19	HTG Sys Repair/Replace : GSH w/CZ11 w/MH	System	0.23	0.03	8	\$16,266	\$22,333
20	HTG Sys Repair/Replace : GSH w/CZ11 w/SF	System	0.16	0.02	35	\$71,164	\$434,358
21	HTG Sys Repair/Replace : GSH w/CZ12 w/MH	System	0.23	0.03	41	\$83,363	\$83,062
22	HTG Sys Repair/Replace : GSH w/CZ12 w/SF	System	0.14	0.02	469	\$953,597	\$433,633
23	HTG Sys Repair/Replace : GSH w/CZ13 w/MF	System	0.00	0.00	3	\$6,100	\$358,307
24	HTG Sys Repair/Replace : GSH w/CZ13 w/MH	System	0.22	0.03	8	\$16,266	\$212,828
25	HTG Sys Repair/Replace : GSH w/CZ13 w/SF	System	0.12	0.02	241	\$490,014	\$27,393
26	Duct Sealing - ESH & AC w/CZ11 w/MH	11	0.00	0.00	1	\$783	\$7,943
27	Duct Sealing - ESH & AC w/CZ11 w/SF	11	0.00	0.00	2	\$1,566	\$25,956
28	Duct Sealing - ESH & AC w/CZ12 w/SF	12	0.00	0.00	12	\$9,398	\$21,524
29	Duct Sealing - ESH & AC w/CZ13 w/SF	13	0.00	0.00	1	\$783	\$571
30	Duct Sealing - GSH & AC w/CZ2 w/MH	2	1.19	1.26	1	\$783	\$580
31	Duct Sealing - GSH & AC w/CZ3 w/MH	3B	1.03	0.95	1	\$783	\$13,918
32	Duct Sealing - GSH & AC w/CZ3 w/SF	3A	1.18	1.16	23	\$18,013	\$9,982
33	Duct Sealing - GSH & AC w/CZ3 w/SF	3B	1.18	1.15	32	\$25,062	\$117,878
34	Duct Sealing - GSH & AC w/CZ4 w/MH	4	0.98	0.98	1	\$783	\$1,528
35	Duct Sealing - GSH & AC w/CZ4 w/SF	4	1.12	1.18	56	\$43,859	\$25,838
36	Duct Sealing - GSH & AC w/CZ11 w/MH	11	0.70	0.55	29	\$22,713	\$163,973
37	Duct Sealing - GSH & AC w/CZ11 w/SF	11	0.93	0.82	18	\$14,097	\$61,381
38	Duct Sealing - GSH & AC w/CZ12 w/MH	12	0.90	0.82	15	\$11,748	\$184,883
39	Duct Sealing - GSH & AC w/CZ12 w/SF	12	1.09	1.13	1097	\$859,163	\$20,559
40	Duct Sealing - GSH & AC w/CZ13 w/MH	13	0.67	0.50	10	\$7,832	\$45,287
41	Duct Sealing - GSH & AC w/CZ13 w/SF	13	0.79	0.62	746	\$584,262	\$2,842
42	Duct Sealing - ESH w/o AC w/CZ12 w/SF	12	0.00	0.00	1	\$783	\$163
43	Duct Sealing - GSH w/o AC w/CZ2 w/MH	2	0.00	0.00	5	\$3,916	\$8,455
44	Duct Sealing - GSH w/o AC w/CZ3 w/SF	3A	0.00	0.00	59	\$46,208	\$3,695
45	Duct Sealing - GSH w/o AC w/CZ3 w/SF	3B	0.00	0.00	48	\$37,593	\$3,201
46	Duct Sealing - GSH w/o AC w/CZ4 w/SF	4	0.00	0.00	31	\$24,279	\$52,552
47	Duct Sealing - GSH w/o AC w/CZ11 w/MH	11	0.00	0.00	5	\$3,916	\$906
48	Duct Sealing - GSH w/o AC w/CZ12 w/MH	12	0.00	0.00	2	\$1,566	\$228
49	Duct Sealing - GSH w/o AC w/CZ12 w/SF	12	0.00	0.00	49	\$38,376	\$6,536
50	Duct Sealing - GSH w/o AC w/CZ13 w/SF	13	0.00	0.00	1	\$783	\$1,191
51	Water Heater Repair & Replacement - GWH w/CZ w/SF	System	0.33	0.04	831	\$1,028,015	\$291,264
52	Water Heater Repair & Replacement - GWH w/CZ w/MF	System	0.00	0.00	4	\$4,948	\$12,708
53	Water Heater Repair & Replacement - GWH w/CZ w/MH	System	0.33	0.04	34	\$42,061	\$15,690
54	Air Slg/Envelope : ESH w/CZ4 w/SF V12	4	0.00	0.00	23	\$10,058	\$74,383
55	Air Slg/Envelope : ESH w/CZ2 w/SF V12	2	0.59	0.08	62	\$27,113	\$344,945
56	Air Slg/Envelope : ESH w/CZ2 w/MH V12	2	0.88	0.12	11	\$4,810	\$10,671
57	Air Slg/Envelope : OGSH w/CZ13 w/MF V12	13	0.31	0.06	2	\$875	\$24
58	Air Slg/Envelope : GSH w/CZ4 w/MF V12	4	0.15	0.03	416	\$181,920	\$114,566
59	Air Slg/Envelope : GSH w/CZ13 w/MF V12	13	0.31	0.06	1428	\$624,476	\$223,052
60	Air Slg/Envelope : ESH w/CZ3 w/MF V12	3A	0.55	0.07	11	\$4,810	\$12,861
61	Air Slg/Envelope : ESH w/CZ3 w/MF V12	3B	0.54	0.07	6	\$2,624	\$34,624
62	Air Slg/Envelope : GSH w/CZ2 w/MF V12	2	0.13	0.02	51	\$22,303	\$271,817
63	Air Slg/Envelope : ESH w/CZ2 w/MF V12	2	0.55	0.07	8	\$3,498	\$257,703
64	Air Slg/Envelope : ESH w/CZ1 w/MF V12	1	1.21	0.17	9	\$3,936	\$3,633
65	Air Slg/Envelope : ESH w/CZ4 w/MF V12	4	0.00	0.00	40	\$17,492	\$50,233
66	Air Slg/Envelope : ESH w/CZ5 w/MF V12	5	0.00	0.00	4	\$1,749	\$23,014
67	Air Slg/Envelope : GSH w/CZ3 w/MF V12	3A	0.13	0.02	55	\$24,052	\$12,089
68	Air Slg/Envelope : GSH w/CZ3 w/MF V12	3B	0.13	0.02	92	\$40,232	\$189,153
69	Air Slg/Envelope : ESH w/CZ1 w/SF V12	1	1.17	0.17	4	\$1,749	\$49,460
70	Air Slg/Envelope : GSH w/CZ11 w/MF V12	11	0.12	0.02	431	\$188,480	\$305,355
71	Air Slg/Envelope : ESH w/CZ4 w/MH V12	4	0.00	0.00	4	\$1,749	\$205,416
72	Air Slg/Envelope : GSH w/CZ12 w/MF V12	12	0.29	0.06	818	\$357,718	\$3,400,145
73	Air Slg/Envelope : ESH w/CZ3 w/SF V12	3A	0.00	0.00	3	\$1,312	\$88,243

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	A	B	C	D	E	F	G
1	ESA Table 16 - "Add Back" Measures Pacific Gas and Electric Company Program Year 2017						
2	Measure [1]	Climate Zone	Ratio of Benefits Over Costs		Quantity Installed	Budget Impact of "Add Back"	Lifecycle Bill Savings Impact
3			ESACET	Resource TRC			
74	Air Slq/Envelope : ESH w/CZ3 w/SF V12	3B	0.00	0.00	9	\$3,936	\$540,994
75	Air Slq/Envelope : ESH w/CZ1 w/MF	1	1.20	0.17	19	\$8,309	\$8,811
76	Air Slq/Envelope : ESH w/CZ1 w/MH	1	1.18	0.17	4	\$1,749	\$428,654
77	Air Slq/Envelope : ESH w/CZ1 w/SF	1	1.17	0.16	12	\$5,248	\$29,153
78	Air Slq/Envelope : ESH w/CZ2 w/MF	2	0.54	0.07	331	\$144,749	\$9,363
79	Air Slq/Envelope : ESH w/CZ2 w/MH	2	0.90	0.12	3	\$1,312	\$7,027
80	Air Slq/Envelope : ESH w/CZ2 w/SF	2	0.59	0.08	35	\$15,306	\$287,018
81	Air Slq/Envelope : ESH w/CZ3 w/MF	3A	0.54	0.07	1509	\$659,898	\$386,792
82	Air Slq/Envelope : ESH w/CZ3 w/MF	3B	0.55	0.07	233	\$101,893	\$245,051
83	Air Slq/Envelope : ESH w/CZ3 w/MH	3A	0.09	0.01	3	\$1,312	\$670
84	Air Slq/Envelope : ESH w/CZ3 w/MH	3B	0.09	0.01	5	\$2,187	\$1,871,877
85	Air Slq/Envelope : ESH w/CZ3 w/SF	3A	0.00	0.00	119	\$52,040	\$9,948
86	Air Slq/Envelope : ESH w/CZ3 w/SF	3B	0.00	0.00	117	\$51,165	\$12,177
87	Air Slq/Envelope : ESH w/CZ4 w/MF	4	0.00	0.00	248	\$108,452	\$493,704
88	Air Slq/Envelope : ESH w/CZ4 w/MH	4	0.00	0.00	3	\$1,312	\$154,420
89	Air Slq/Envelope : ESH w/CZ4 w/SF	3B	0.00	0.00	1	\$437	\$130,852
90	Air Slq/Envelope : ESH w/CZ4 w/SF	4	0.00	0.00	72	\$31,486	\$2,845,590
91	Air Slq/Envelope : ESH w/CZ5 w/MF	5	0.00	0.00	54	\$23,615	\$46,980
92	Air Slq/Envelope : ESH w/CZ5 w/SF	5	0.00	0.00	20	\$8,746	\$139,906
93	Air Slq/Envelope : ESH w/CZ11 w/MF	11	0.61	0.08	51	\$22,303	\$31,132
94	Air Slq/Envelope : ESH w/CZ11 w/MH	11	0.38	0.05	13	\$5,685	\$26,281
95	Air Slq/Envelope : ESH w/CZ11 w/SF	11	0.50	0.07	58	\$25,364	\$8,640
96	Air Slq/Envelope : ESH w/CZ12 w/MF	12	0.08	0.01	41	\$17,930	\$18,857
97	Air Slq/Envelope : ESH w/CZ12 w/MH	12	0.00	0.00	8	\$3,498	\$221,419
98	Air Slq/Envelope : ESH w/CZ12 w/SF	12	0.00	0.00	138	\$60,348	\$2,171
99	Air Slq/Envelope : ESH w/CZ13 w/MF	13	0.20	0.03	34	\$14,868	\$236
100	Air Slq/Envelope : ESH w/CZ13 w/MH	13	0.16	0.02	4	\$1,749	\$226
101	Air Slq/Envelope : ESH w/CZ13 w/SF	13	0.17	0.02	42	\$18,367	\$13,667
102	Air Slq/Envelope : ESH w/CZ16 w/MF	16	1.18	0.17	1	\$437	\$612
103	Air Slq/Envelope : ESH w/CZ16 w/SF	16	0.76	0.10	30	\$13,119	\$4,479
104	Air Slq/Envelope : OGS w/CZ5 w/MF	5	0.16	0.03	1	\$437	\$770
105	Air Slq/Envelope : OGS w/CZ12 w/MF	12	0.30	0.06	2	\$875	\$291,901
106	Air Slq/Envelope : GSH w/CZ1 w/MF	1	0.17	0.03	1	\$437	\$35
107	Air Slq/Envelope : GSH w/CZ2 w/MF	2	0.13	0.02	240	\$104,954	\$26,709
108	Air Slq/Envelope : GSH w/CZ3 w/MF	3A	0.12	0.02	2034	\$889,484	\$197,501
109	Air Slq/Envelope : GSH w/CZ3 w/MF	3B	0.13	0.02	718	\$313,987	\$271,943
110	Air Slq/Envelope : GSH w/CZ4 w/MF	4	0.16	0.03	607	\$265,446	\$135,848
111	Air Slq/Envelope : GSH w/CZ11 w/MF	11	0.12	0.02	21	\$9,183	\$15,124
112	Air Slq/Envelope : GSH w/CZ12 w/MF	12	0.29	0.06	118	\$51,602	\$935
113	Air Slq/Envelope : GSH w/CZ13 w/MF	13	0.31	0.06	80	\$34,985	\$203,898
114	Air Slq/Envelope : GSH w/CZ16 w/MF	16	0.00	0.00	1	\$437	\$0
115	Attic Insulation : GSH w/o AC w/CZ2 w/SF	2	0.50	0.34	9	\$13,791	\$37,948
116	Attic Insulation : GSH w/o AC w/CZ3 w/MF	3A	0.54	0.37	5	\$7,661	\$2,880
117	Attic Insulation : GSH w/o AC w/CZ3 w/MF	3B	0.53	0.37	1	\$1,532	\$308
118	Attic Insulation : GSH w/o AC w/CZ3 w/SF	3A	0.54	0.38	195	\$298,797	\$207,251
119	Attic Insulation : GSH w/o AC w/CZ3 w/SF	3B	0.55	0.38	158	\$242,102	\$2,853
120	Attic Insulation : GSH w/o AC w/CZ4 w/MF	4	0.57	0.40	1	\$1,532	\$5,355
121	Attic Insulation : GSH w/o AC w/CZ4 w/SF	3B	0.58	0.41	1	\$1,532	\$161
122	Attic Insulation : GSH w/o AC w/CZ4 w/SF	4	0.57	0.40	120	\$183,875	\$1,697
123	Attic Insulation : GSH w/o AC w/CZ11 w/SF	11	0.54	0.38	57	\$87,341	\$15,263
124	Attic Insulation : GSH w/o AC w/CZ12 w/MF	12	0.55	0.39	3	\$4,597	\$2,772
125	Attic Insulation : GSH w/o AC w/CZ12 w/SF	12	0.57	0.40	128	\$196,133	\$1,705
126	Attic Insulation : GSH w/o AC w/CZ13 w/MF	13	0.58	0.41	2	\$3,065	\$90,954
127	Attic Insulation : GSH w/o AC w/CZ13 w/SF	13	0.60	0.43	54	\$82,744	\$17,581
128	Attic Insulation : GSH w/o AC w/CZ16 w/SF	16	0.56	0.39	5	\$7,661	\$4,112
129	Attic Insulation : OGS w/o AC w/CZ3 w/SF	3B	0.54	0.38	1	\$1,532	\$37
130	Attic Insulation : OGS w/o AC w/CZ11 w/SF	11	0.54	0.37	4	\$6,129	\$1,358
131	Attic Insulation : OGS w/o AC w/CZ12 w/SF	12	0.58	0.41	1	\$1,532	\$300,933
132	Attic Insulation : OGS w/o AC w/CZ13 w/SF	13	0.59	0.42	3	\$4,597	\$4,248
133	Attic Insulation : GSH w/AC w/CZ3 w/SF	3A	0.59	0.41	18	\$27,581	\$5,651
134	Attic Insulation : GSH w/AC w/CZ3 w/SF	3B	0.59	0.41	28	\$42,904	\$631
135	A/C Replacement-Room w/CZ13 w/MF	13	0.41	0.20	31	\$21,530	\$58,715
136	A/C Replacement-Room w/CZ13 w/MH	13	1.05	0.59	213	\$147,929	\$38,184
137	A/C Replacement-Room w/CZ13 w/SF	13	1.17	0.69	2,193	\$1,523,046	\$25,941
138	Duct Sealing - ESH & AC w/CZ4 w/SF	4	0.00	0.00	1	\$783	\$9,414
139							
140	Notes:						
141	[1] Based on Appendix H.1 and H.2 in D.12-08-044 and D.14-08-030.						

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	A	B	C	D	E	F	G	H	I	J
1	ESA Table 17 - ESA Expenditures for Pilots and Studies Pacific Gas and Electric Company Program Year 2017									
2		Authorized 2017 Funding			2017 Expenses			Budget Expended		
3		Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
4	Pilots									
5	Programmable Controllable Thermostat/ Smart Thermostat TOU ^[1]	\$250,000	0	\$ 250,000	\$ -	\$ -	\$ -	0%	0%	0%
6	Consumption Driven Weatherization ^[2]	\$212,160	\$195,840	\$ 408,000	\$ -	\$ -	\$ -	0%	0%	0%
7	Total Pilots	\$462,160	\$195,840	\$658,000	\$0	\$0	\$0	0%	0%	0%
8										
9	Studies									
10	Low Income Needs Assessment (LINA) Study ^[3]	\$ 78,000	\$ 72,000	\$ 150,000	\$ -	\$ -	\$ -	0%	0%	0%
11	Load Impact Evaluation Study ^[4]	\$ 85,800	\$ 79,200	\$ 165,000	\$ 29,549	\$ 27,276	\$ 56,824	34%	34%	34%
12	Non Energy Benefits (NEB) Study ^[5]	\$ 23,400	\$ 21,600	\$ 45,000	\$ -	\$ -	\$ -	0%	0%	0%
13	2017 Potential and Goals Study	\$ 46,800	\$ 43,200	\$ 90,000	\$ -	\$ -	\$ -	0%	0%	0%
14	Rapid Feedback Research and Analysis	\$104,000	\$ 96,000	\$ 200,000	\$ -	\$ -	\$ -	0%	0%	0%
15	Total Studies	\$338,000	\$312,000	\$650,000	\$29,549	\$27,276	\$56,824	9%	9%	9%
16										
17	^[1] D.17-12-009, Attachment 1 (modified D.16-11-022), OP.66 directed electric IOUs to file PCT pilot implementation plans by March 1, 2018. Updated pilot plans have not been authorized and this pilot has not yet begun. D.16-11-022 authorized \$250,000.									
18	^[2] PG&E proposed the CDWx pilot in its 2015-2017 ESA Application, authorized in D.16-11-022, OP.144. In December 2017, PG&E requested and was granted an extension to implement this pilot so that CSD could be included in it. This pilot will begin implementation in 2018.									
19	^[3] A contract for this statewide study was awarded in January 2018. SCE is the project manager. There has been no cross-billing.									
20	^[4] SCG is the contract manager of this co-funded statewide study. Cross-billing from SCG typically occurs quarterly.									
21	^[5] This statewide study has not been bid out yet. SDG&E is the contract manager.									

	A	B	C	D
1	ESA Table 18 - Homes Receiving Second Refrigerators and In-Home Energy Education Only Pacific Gas and Electric Company Program Year 2017			
2				
3	Measures	Units	Received Refrigerator	Not eligible for Refrigerator Due to Less than Six Occupants
4	Second Refrigerators [1]	Each	NA	NA
5				
6				
7				
8	Measures	Units	Households that Only Received Energy Education [2]	
9	In-Home Energy Education	Home	0	
10				
11				
12				
13	Households for My Energy/My Account Platform [3]			
14	Opt-Out	Already Enrolled	Opt-In	
15	NA	NA	NA	
16	[1] PG&E will implement 2nd refrigerators in 2018. [2] D.16-11-022 removed the 3 measure minimum. No income qualified home in 2017 did not also qualify to receive at least one measure. [3] PG&E will implement My Energy/ My Account tracking in 2018.			
17				
18				
19				

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	A	B	C	D	E	F	G	H
1	PY 2017 CARE Annual Report							
2	CARE Table 1							
3	Overall Program Expenses							
4	Category	Overall Expenditures [1]		Total	Authorized Budget	% of Budget Spent	Total Shifted [2]	Shifted to/from?
5		Electric	Gas					
6	Outreach	\$ 5,752,920	\$ 1,438,230	\$ 7,191,150	\$ 10,043,108	72%		
7	Processing, Certification, Recertification	\$ 855,361	\$ 213,840	\$ 1,069,201	\$ 1,985,120	54%		
8	Post Enrollment Verification	\$ 1,178,529	\$ 294,632	\$ 1,473,161	\$ 1,611,838	91%		
9	IT Programming	\$ 1,035,681	\$ 258,920	\$ 1,294,602	\$ 1,843,221	70%		
10	Cool Centers	\$ 124,126	\$ -	\$ 124,126	\$ 137,447	90%		
11	Pilots	\$ 407,536	\$ 101,884	\$ 509,420	\$ 532,126	96%		
12	Measurement & Evaluation	\$ 107,741	\$ 26,935	\$ 134,677	\$ 146,902	0%		
13	Regulatory Compliance	\$ 299,341	\$ 74,835	\$ 374,176	\$ 500,235	75%		
14	General Administration	\$ 698,866	\$ 174,717	\$ 873,583	\$ 1,132,004	77%		
15	CPUC Energy Division	\$ 99,853	\$ 24,963	\$ 124,817	\$ 128,000	98%		
16								
17	TOTAL Program Costs	\$ 10,559,954	\$ 2,608,957	\$ 13,168,911	\$ 18,060,001	73%	\$ -	
18								
19	CARE Rate Discount	\$ 533,683,875	\$ 109,854,309	\$ 643,538,184	\$ 580,353,000	111%	\$ 63,185,184	
20	Service Establishment Charge Discount							
21								
22	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 544,243,829	\$ 112,463,266	\$ 656,707,096	\$ 598,413,001	110%	\$ 63,185,184	
23								
24	[1] Program authorized budget per D.16-11-022 has been updated to include \$851,547 as authorized in the 2017 GRC Decision (D.) 17-05-013 - Decision Authorizing Pacific Gas and Electric Company's General Rate Case Revenue Requirement for 2017-2019. Actual employee benefit burden costs have been included in the program expenses.							
25	[2] Total program administrative expenses did not exceed the overall authorized budget. The CARE discount exceeded the authorized amount by \$63,185,184. Per D.02-09-021, PG&E is authorized to recover the full value of the discount through the CARE two-way balancing account on an automatic pass-through basis. The information in the "Total Shifted" and "Shifted to/from?" column is for illustrative purposes only, to disclose how funds from the overall authorized budget can be shifted between categories per Section 20.3.3 in D.08-11-031.							
26								
27								

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	
	PY 2017 CARE Annual Report																									
	CARE Table 2																									
	Enrollment, Recertification, Attrition, & Penetration																									
	Month	New Enrollment								Recertification							Attrition (Drop Offs)					Enrollment		Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)
		Automatic Enrollment			Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)		Automatic	Total Recertification (L+M+N)	No Response ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)				
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)			Scheduled	Scheduled (Duplicates)										Automatic	Total Recertification (L+M+N)	No Response ⁴	Failed PEV
7	January	0	982	0	982	16,276	8,564	1,764	97	26,701	27,683	33,779	7,721	6,256	47,756	n/a	11,983	8,693	10,788	31,464	75,439	-3,781	1,419,543	1,588,016	89.4%	
8	February	0	1,518	0	1,518	14,529	7,108	1,251	128	23,016	24,534	29,922	8,283	10,315	48,520	n/a	5,497	7,075	8,002	20,574	73,054	-3,960	1,423,503	1,588,016	89.6%	
9	March	0	1,192	0	1,192	14,034	9,423	1,214	121	24,792	25,984	29,895	7,264	6,885	44,044	n/a	6,691	8,853	12,086	27,630	70,028	-1,646	1,421,857	1,588,016	89.5%	
10	April	0	1,495	0	1,495	9,044	6,481	729	79	16,333	17,828	33,417	10,613	9,808	53,838	n/a	6,517	5,767	8,712	20,996	71,666	-3,168	1,418,689	1,588,016	89.3%	
11	May	0	1,417	0	1,417	11,693	5,255	1,037	59	18,044	19,461	30,972	7,042	9,185	47,199	n/a	5,065	6,483	15,139	26,687	66,660	-7,226	1,411,463	1,588,016	88.9%	
12	June	0	2,153	0	2,153	11,065	6,766	897	62	18,790	20,943	34,202	8,471	15,694	58,367	n/a	7,942	7,064	12,699	27,705	79,310	-6,762	1,404,701	1,588,016	88.5%	
13	July	0	1,375	0	1,375	11,860	5,874	947	44	19,725	20,100	30,304	9,076	11,004	50,384	n/a	5,389	6,114	6,389	17,892	70,484	2,208	1,406,909	1,588,016	88.6%	
14	August	0	1,464	0	1,464	13,914	9,345	1,883	49	25,191	26,655	30,999	11,244	10,012	52,255	n/a	4,304	4,273	18,374	26,951	78,910	-296	1,406,613	1,588,016	88.6%	
15	September	0	1,523	0	1,523	9,360	8,275	1,622	66	19,323	20,846	28,861	15,678	9,505	54,044	n/a	2,655	4,672	11,110	18,437	74,880	2,409	1,409,022	1,588,016	88.7%	
16	October	0	1,347	0	1,347	8,997	6,140	881	106	16,124	17,471	30,873	14,491	8,024	53,388	n/a	5,769	5,998	7,927	19,694	70,859	-2,223	1,406,799	1,588,016	88.6%	
17	November	0	1,441	0	1,441	8,868	4,650	651	70	14,239	15,680	23,704	6,869	9,247	39,820	n/a	5,433	6,155	4,005	15,593	55,500	87	1,406,886	1,588,016	88.6%	
18	December	0	407	0	407	6,292	5,724	324	71	12,411	12,818	25,702	5,312	12,568	43,572	n/a	860	5,680	6,788	13,308	56,390	-490	1,406,396	1,588,016	88.6%	
19	YTD Total	0	16,314	0	16,314	135,932	83,605	13,200	952	233,689	250,003	362,630	112,064	118,493	593,187	n/a	68,105	76,807	122,019	266,931	843,190	-16,928	1,406,396	1,588,016	88.6%	
20																										
21	¹ Enrollments via data sharing between the IOUs.																									
22	² Enrollments via data sharing between departments and/or programs within the utility.																									
23	³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.																									
24	⁴ No response includes no response to both Recertification and Verification.																									

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	A	B	C	D	E	F	G	H	I
1	PY 2017 CARE Annual Report								
2	CARE Table 3A								
3	Post-Enrollment Verification Results (Model)								
4	Month	Total CARE Households Enrolled	Households Requested to Verify¹	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible)²	Total Households De-enrolled³	% De-enrolled through Post Enrollment Verification⁴	% of Total CARE Households De-enrolled
5	January	1,419,543	3,724	0.26%	2,772	155	2,927	78.60%	0.21%
6	February	1,423,503	3,221	0.23%	2,307	138	2,445	75.91%	0.17%
7	March	1,421,857	4,381	0.31%	2,728	273	3,001	68.50%	0.21%
8	April	1,418,689	5,227	0.37%	3,647	262	3,909	74.78%	0.28%
9	May	1,411,463	6,250	0.44%	4,742	282	5,024	80.38%	0.36%
10	June	1,404,701	5,367	0.38%	3,895	232	4,127	76.90%	0.29%
11	July	1,406,909	3,737	0.27%	2,534	171	2,705	72.38%	0.19%
12	August	1,406,613	2,202	0.16%	1,628	84	1,712	77.75%	0.12%
13	September	1,409,022	1,480	0.11%	1,032	49	1,081	73.04%	0.08%
14	October	1,406,799	868	0.06%	603	34	637	73.39%	0.05%
15	November	1,406,886	3,607	0.26%	2,329	147	2,476	68.64%	0.18%
16	December	1,406,396	3,297	0.23%	2,364	58	2,422	73.46%	0.17%
17	YTD Total	1,406,396	43,361	3.08%	30,581	1,885	32,466	74.87%	2.31%
18									
19	¹ Includes customers selected randomly or via PG&E's CARE probability model.								
20	² Includes customers verified as over income or who requested to be de-enrolled.								
21	³ Verification results are tied to the month initiated.								
22	⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.								
23									
24									
25	PY 2017 CARE Annual Report								
26	CARE Table 3B								
27	Post-Enrollment Verification Results (Electric only High Usage)								
28	Month	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled³	% De-enrolled through HU Post Enrollment Verification	% of Total CARE Households De-enrolled
29	January	1,419,543	4,127	0.29%	3,938	51	3,989	96.66%	0.28%
30	February	1,423,503	6,559	0.46%	6,423	63	6,486	98.89%	0.46%
31	March	1,421,857	2,926	0.21%	2,814	51	2,865	97.92%	0.20%
32	April	1,418,689	1,275	0.09%	1,183	31	1,214	95.22%	0.09%
33	May	1,411,463	555	0.04%	520	11	531	95.68%	0.04%
34	June	1,404,701	803	0.06%	753	20	773	96.26%	0.06%
35	July	1,406,909	2,983	0.21%	2,750	60	2,810	94.20%	0.20%
36	August	1,406,613	3,759	0.27%	3,417	107	3,524	93.75%	0.25%
37	September	1,409,022	6,476	0.46%	6,038	134	6,172	95.31%	0.44%
38	October	1,406,799	5,483	0.39%	5,028	147	5,175	94.38%	0.37%
39	November	1,406,886	867	0.06%	775	37	812	93.66%	0.06%
40	December	1,406,396	591	0.04%	557	10	567	95.94%	0.04%
41	YTD Total	1,406,396	36,404	2.59%	34,196	722	34,918	95.92%	2.48%
42									
43	¹ Includes all participants who were selected for high usage verification process.								
44	² Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.								

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	A	B	C	D	E	F	G
1	PY 2017 CARE Annual Report						
2	CARE Table 4						
3	CARE Self-Certification and Self-Recertification Applications¹						
4		Provided ²	Received	Approved	Denied	Pending/Never Completed	Duplicates
5	Total (Y-T-D)	5,888,478	526,054	480,681	31,694	13,679	112,064
6	Percentage³		100%	91%	6%	3%	21%
7							
8	¹ Includes sub-metered customers.						
9	² Includes number of applications provided via direct mail campaigns, call centers, bill inserts and other outreach methods. Because there are other means by which customers obtain applications which are not counted, this number is only an approximation.						
10	³ Percentage of Received. Duplicates are also counted as Approved, so the total will not add up to 100%.						

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	A	B	C	D	E	F	G	H	I	J
1	PY 2017 CARE Annual Report									
2	CARE Table 5									
3	CARE Enrollment by County									
4	County	Estimated Eligible Households			Total Households Enrolled			Penetration Rate		
5		Urban	Rural ¹	Total	Urban	Rural ¹	Total	Urban	Rural ¹	Total
6	ALAMEDA	133,821	3	133,824	119,091	3	119,094	89%	n/a	89%
7	ALPINE	0	134	134	0	6	6	n/a	4%	4%
8	AMADOR	1	5,493	5,494	0	4,247	4,247	n/a	77%	77%
9	BUTTE	25,760	12,468	38,228	24,441	12,191	36,632	95%	98%	96%
10	CALAVERAS	54	7,614	7,668	44	5,094	5,138	81%	67%	67%
11	COLUSA	9	3,322	3,331	12	3,331	3,343	137%	100%	100%
12	CONTRA COSTA	88,913	20	88,932	84,981	3	84,984	96%	15%	96%
13	EL DORADO	6,921	6,204	13,125	5,385	5,576	10,961	78%	90%	84%
14	FRESNO	136,247	235	136,482	151,928	117	152,045	112%	50%	111%
15	GLENN	0	5,391	5,391	1	4,665	4,666	n/a	87%	87%
16	HUMBOLDT	0	22,316	22,316	0	17,616	17,616	n/a	79%	79%
17	KERN	35,517	55,325	90,842	43,246	63,600	106,846	122%	115%	118%
18	KINGS	159	9,023	9,182	125	9,046	9,171	79%	100%	100%
19	LAKE	1	16,017	16,018	2	12,087	12,089	n/a	75%	75%
20	LASSEN	0	214	214	0	172	172	n/a	80%	80%
21	MADERA	14,039	6,498	20,537	16,467	5,426	21,893	117%	84%	107%
22	MARIN	19,069	0	19,069	12,253	0	12,253	64%	n/a	64%
23	MARIPOSA	23	3,368	3,391	12	2,184	2,196	52%	65%	65%
24	MENDOCINO	14	15,637	15,651	6	9,826	9,832	42%	63%	63%
25	MERCED	19,755	20,765	40,520	19,671	20,726	40,397	100%	100%	100%
26	MONTEREY	38,806	4,939	43,744	36,355	6,185	42,540	94%	125%	97%
27	NAPA	13,425	0	13,425	10,434	0	10,434	78%	n/a	78%
28	NEVADA	12	11,650	11,662	2	8,899	8,901	17%	76%	76%
29	PLACER	19,243	11,216	30,459	12,304	7,792	20,096	64%	69%	66%
30	PLUMAS	109	3,051	3,160	11	1,745	1,756	10%	57%	56%
31	SACRAMENTO	149,576	0	149,576	101,566	0	101,566	68%	n/a	68%
32	SAN BENITO	101	4,362	4,463	65	4,766	4,831	64%	109%	108%
33	SAN BERNARDINO	83	448	532	34	247	281	41%	55%	53%
34	SAN FRANCISCO	74,670	0	74,670	62,044	0	62,044	83%	n/a	83%
35	SAN JOAQUIN	80,101	10,015	90,117	79,784	8,762	88,546	100%	87%	98%
36	SAN LUIS OBISPO	12,331	19,860	32,191	5,077	12,886	17,963	41%	65%	56%
37	SAN MATEO	47,510	0	47,510	32,951	0	32,951	69%	n/a	69%
38	SANTA BARBARA	18,446	1,693	20,139	16,824	698	17,522	91%	41%	87%
39	SANTA CLARA	109,742	3,859	113,601	97,147	2,916	100,063	89%	76%	88%
40	SANTA CRUZ	26,559	7	26,567	19,255	1	19,256	72%	14%	72%
41	SHASTA	12,730	11,679	24,408	10,242	8,822	19,064	80%	76%	78%
42	SIERRA	5	303	308	2	132	134	39%	44%	44%
43	SISKIYOU	0	19	19	0	7	7	n/a	37%	37%
44	SOLANO	41,128	0	41,128	42,356	0	42,356	103%	n/a	103%
45	SONOMA	45,178	2,769	47,947	36,546	2,478	39,024	81%	89%	81%
46	STANISLAUS	33,205	27,956	61,161	25,645	23,626	49,271	77%	85%	81%
47	SUTTER	12,976	0	12,976	13,880	0	13,880	107%	n/a	107%
48	TEHAMA	11	12,092	12,103	9	11,552	11,561	84%	96%	96%
49	TRINITY	0	560	560	0	286	286	n/a	51%	51%
50	TULARE	658	7,895	8,553	356	9,297	9,653	54%	118%	113%
51	TUOLUMNE	0	10,295	10,295	0	6,872	6,872	n/a	67%	67%
52	YOLO	24,842	0	24,843	20,454	1	20,455	82%	n/a	82%
53	YUBA	11,414	134	11,547	11,398	104	11,502	100%	78%	100%
54	Total	1,253,165	334,851	1,588,016	1,112,406	293,990	1,406,396	89%	88%	89%
55										
56	¹ "Rural" includes ZIP Codes classified as such by the Goldsmith modification that was developed to identify small									
57	towns and rural areas within large metropolitan counties. ZIP Codes not defined as rural are classified as urban.									

Pacific Gas and Electric Company
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	A	B	C	D	E	F	G	H
1	PY 2017 CARE Annual Report							
2	CARE Table 6							
3	CARE Recertification Results							
4	2017	Total CARE Households	Households Requested to Recertify ¹	% of Households Total (C/B)	Households Recertified ²	Households De-enrolled ³	Recertification Rate % ⁴ (E/C)	% of Total Households De-enrolled (F/B)
5	January	1,419,543	17,356	1.2%	11,589	5,767	67%	0.41%
6	February	1,423,503	20,950	1.5%	14,467	6,483	69%	0.46%
7	March	1,421,857	19,096	1.3%	12,032	7,064	63%	0.50%
8	April	1,418,689	17,484	1.2%	11,370	6,114	65%	0.43%
9	May	1,411,463	14,507	1.0%	10,234	4,273	71%	0.30%
10	June	1,404,701	15,786	1.1%	11,114	4,672	70%	0.33%
11	July	1,406,909	20,611	1.5%	14,613	5,998	71%	0.43%
12	August	1,406,613	18,784	1.3%	12,629	6,155	67%	0.44%
13	September	1,409,022	16,994	1.2%	11,334	5,660	67%	0.40%
14	October	1,406,799	16,635	1.2%	10,515	6,120	63%	0.44%
15	November	1,406,886	16,245	1.2%	10,352	5,893	64%	0.42%
16	December	1,406,396	15,551	1.1%	10,099	5,452	65%	0.39%
17	YTD	1,406,396	209,999	14.93%	140,348	69,651	67%	4.95%
18								
19	¹ Excludes count of customers recertified through the probability model.							
20	² Recertification results are tied to the month initiated.							
21	³ Includes customers who did not respond or who requested to be de-enrolled.							
22	⁴ Percentage of customers recertified compared to the total participants requested to recertify in that month.							
23								

Pacific Gas and Electric Company
PY 2017 ESA-CARE Annual Report

	A	B	C	D	E	F	G	H	I
1	PY 2017 CARE Annual Report								
2	CARE Table 7								
3	CARE Capitation Contractors								
4	Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments ²			Total Expenditures
5		Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
6	ACC Senior Services (formerly Asian Community Center)		X			0	11	11	\$ 220
7	Afghan Coalition					2	28	30	\$ 600
8	Amador-Tuolumne Community Action Agency		X			5	1	6	\$ 120
9	Area Agency on Aging Serving Napa and Solano		X			0	1	1	\$ 20
10	Arriba Juntos					0	0	0	\$ -
11	Breathe California Central Coast					0	6	6	\$ 120
12	Breathe California of the Bay Area					0	0	0	\$ -
13	California Human Development Corporation		X			0	1	1	\$ 20
14	Catholic Charities Diocese of Fresno					7	48	55	\$ 1,100
15	Center of Vision Enhancement		X			0	0	0	\$ -
16	Central California Legal Services, Inc.					1	3	4	\$ 80
17	Central Coast Energy Services, Inc.					7	51	58	\$ 1,160
18	Child Abuse Prevention Council of San Joaquin County					0	0	0	\$ -
19	Chinese Christian Herald Crusades		X			0	1	1	\$ 20
20	Chinese Newcomers Service Center					0	9	9	\$ 180
21	Community Action Marin					1	26	27	\$ 540
22	Community Action Partnership of Madera County					12	55	67	\$ 1,340
23	Community Health for Asian Americans		X			0	0	0	\$ -
24	Community Resource Project, Inc.					0	126	126	\$ 2,520
25	Community Resources for Independent Living		X			0	0	0	\$ -
26	County of San Joaquin					8	129	137	\$ 2,740
27	Disability Resource Agency for Independent Living		X			1	0	1	\$ 20
28	Filipino American Development Foundation					0	1	1	\$ 20
29	Fresno Center for New Americans		X			0	16	16	\$ 320
30	Golden Umbrella		X			1	0	1	\$ 20
31	Good Samaritan Family Resource Center of San Francisco					0	2	2	\$ 40
32	Heritage Institute for Family Advocacy					0	164	164	\$ 3,280
33	Hip Housing Human Investment Project, Inc.					0	1	1	\$ 20
34	Housing Authority of the City of Fresno					0	2	2	\$ 40
35	Housing Authority of the County of Kern					2	0	2	\$ 40
36	Independent Living Center of Kern County, Inc.					11	15	26	\$ 520
37	KidsFirst					1	5	6	\$ 120
38	Kings Community Action Organization, Inc.		X			0	0	0	\$ -
39	Korean American Community Services Inc					0	1	1	\$ 20
40	Lao Khmu Assoc., Inc					1	8	9	\$ 180
41	Madera Coalition for Community Justice					0	2	2	\$ 40
42	Marin Center for Independent Living					0	0	0	\$ -
43	Merced County Community Action Agency		X			4	11	15	\$ 300
44	Merced Lao Family Community Inc.		X			0	0	0	\$ -
45	Moncada Outreach					0	60	60	\$ 1,200
46	Monument Crisis Center		X			0	1	1	\$ 20
47	Mutual Assistance Network of Del Paso Heights					0	0	0	\$ -
48	National Asian American Coalition		X			0	2	2	\$ 40
49	Oakland Citizens Committee for Urban Renewal					0	2	2	\$ 40
50	Project Access, Inc					0	1	1	\$ 20
51	REDI (Renewable Energy Development Institute)					6	0	6	\$ 120
52	Redwood Community Action Agency					2	0	2	\$ 40
53	Resources for Independence Central Valley					0	0	0	\$ -
54	Rising Sun Energy Center					0	2	2	\$ 40
55	Sacred Heart Community Service					0	27	27	\$ 540
56	Second Harvest Food Bank of Santa Cruz and San Benito Counties					0	0	0	\$ -
57	Self-Help for the Elderly					0	47	47	\$ 940
58	Southeast Asian Community Center					0	0	0	\$ -
59	Suscol Intertribal Council					0	0	0	\$ -
60	Tri-County Independent Living Center					2	0	2	\$ 40
61	UpValley Family Centers					0	1	1	\$ 20
62	Valley Oak Children's Services, Inc.					0	1	1	\$ 20
63	West Valley Community Services		X			0	0	0	\$ -
64	Yolo County Housing Authority					0	5	5	\$ 100
65	Yolo Family Resource Center					0	5	5	\$ 100
66	Total Enrollments and Expenditures					74	878	952	\$ 19,040
67									
68	¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.								
69	² Enrollments reflect new enrollments only.								

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	A	B	C	D	E	F	G	H
1	PY 2017 CARE Annual Report							
2	CARE Table 8							
3	CARE Participants as of Month-End							
4	Month	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration	% Change
5	January	846,968	229,902	342,673	1,419,543	1,588,016	89%	-0.3%
6	February	849,114	231,576	342,813	1,423,503	1,588,016	90%	0.3%
7	March	847,251	231,671	342,935	1,421,857	1,588,016	90%	-0.1%
8	April	845,398	231,275	342,016	1,418,689	1,588,016	89%	-0.2%
9	May	840,596	230,213	340,654	1,411,463	1,588,016	89%	-0.5%
10	June	836,594	228,364	339,743	1,404,701	1,588,016	88%	-0.5%
11	July	838,841	227,550	340,518	1,406,909	1,588,016	89%	0.2%
12	August	838,791	227,104	340,718	1,406,613	1,588,016	89%	0.0%
13	September	842,003	225,814	341,205	1,409,022	1,588,016	89%	0.2%
14	October	840,099	226,352	340,348	1,406,799	1,588,016	89%	-0.2%
15	November	838,696	227,390	340,800	1,406,886	1,588,016	89%	0.0%
16	December	839,171	226,934	340,291	1,406,396	1,588,016	89%	0.0%
17								
18								

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	A	B	C	D	E
1	PY 2017 CARE Annual Report				
2	CARE Table 9				
3	CARE Average Monthly Usage & Bill				
4					
5	Average Monthly Gas / Electric Usage				
6	Residential Non-CARE vs. CARE Customers				
7	Customer	Gas Therms	Gas Therms	Total	
8		Tier 1	Tier 2		
9	Non-CARE	23.9	9.4	33.3	
10	CARE	22.8	6.6	29.5	
11	Customer	Electric KWh	Electric KWh	Total	
12		Tier 1	Tier 2 and Above		
13	Non-CARE	271	227	498	
14	CARE	328	191	519	
15					
16					
17	Average Monthly Gas / Electric Bill ⁴				
18	Residential Non-CARE vs. CARE Customers ¹				
19	(Dollars per Customer)				
20	Customer	Gas	Electric		
21	Non-CARE	\$51.49	\$110.68		
22	CARE	\$32.99	\$71.33		
23					
24					
25	¹ Excludes master-meter usage.				
26	² Average Monthly Gas/Electric Bill reflects residential Non-CARE (CARE) 2017 total billed				
27	revenues divided by the average number of Non-CARE (CARE) 2017 monthly bills.				

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	A	B	C	D	E	F
1	PY 2017 CARE Annual Report CARE Table 10 CARE Surcharge & Revenue					
2						
3						
4						
5	Electric					
6	CARE Surcharge and Revenue Collected by Customer Class					
7	Customer Class ¹	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
8		CARE Surcharge	Monthly Bill			
9						
10	Residential	\$4.57	\$111.49	4.1%	\$194,848,322	29.3%
11	Commercial	\$43.95	\$832.51	5.3%	\$284,720,579	42.8%
12	Agricultural	\$44.45	\$1,001.49	4.4%	\$47,278,699	7.1%
13	Large / Industrial	\$9,649.44	\$113,346.22	8.5%	\$137,779,568	20.7%
14						
15						
16	Gas					
17	CARE Surcharge and Revenue Collected by Customer Class					
18	Customer Class ¹	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
19		CARE Surcharge	Monthly Bill			
20						
21	Residential	\$0.95	\$51.49	1.8%	\$41,735,943	35.3%
22	Commercial	\$8.65	\$254.64	3.4%	\$23,309,539	19.7%
23	Natural Gas Vehicle	\$38.98	\$902.34	4.3%	\$1,039,657	0.9%
24	Industrial ²	\$7,219.31	\$79,822.18	9.0%	\$52,070,134	44.1%
25						
26	¹ Excludes CARE customers.					

Pacific Gas and Electric Company
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	A	B	C	D	E	F
1	PY 2017 CARE Annual Report CARE Table 11 CARE Capitation Applications¹					
2						
3						
4	Entity	Total Received	Approved ²	Denied	Pending/ Never Completed	Duplicate
5	ACC Senior Services (formerly Asian Community Center)	13	11	1	0	1
6	Afghan Coalition	43	30	2	0	11
7	Amador-Tuolumne Community Action Agency	8	6	1	0	1
8	Area Agency on Aging Serving Napa and Solano	1	1	0	0	0
9	Breathe California Central Coast	23	6	2	0	15
10	California Human Development Corporation	1	1	0	0	0
11	Catholic Charities Diocese of Fresno	109	55	22	0	32
12	Central California Legal Services, Inc.	5	4	0	0	1
13	Central Coast Energy Services, Inc.	157	58	43	0	56
14	Chinese Christian Herald Crusades	2	1	1	0	0
15	Chinese Newcomers Service Center	14	9	0	0	5
16	Community Action Marin	51	27	8	0	16
17	Community Action Partnership of Madera County	145	67	71	0	7
18	Community Resource Project, Inc.	144	126	9	0	9
19	Community Resources for Independent Living	1	0	0	0	1
20	County of San Joaquin	260	137	65	0	58
21	Disability Resource Agency for Independent Living	2	1	1	0	0
22	Filipino American Development Foundation	5	1	1	0	3
23	Fresno Center for New Americans	24	16	6	0	2
24	Golden Umbrella	3	1	1	0	1
25	Good Samaritan Family Resource Center of San Francisco	2	2	0	0	0
26	Heritage Institute for Family Advocacy	304	164	30	0	110
27	Hip Housing Human Investment Project, Inc.	2	1	0	0	1
28	Housing Authority of the City of Fresno	3	2	1	0	0
29	Housing Authority of the County of Kern	3	2	0	0	1
30	Independent Living Center of Kern County, Inc.	32	26	2	0	4
31	KidsFirst	10	6	2	0	2
32	Korean American Community Services Inc	5	1	0	0	4
33	Lao Khmu Assoc., Inc	11	9	1	0	1
34	Madera Coalition for Community Justice	4	2	1	0	1
35	Merced County Community Action Agency	21	15	5	0	1
36	Moncada Outreach	82	60	5	0	17
37	Monument Crisis Center	2	1	0	0	1

Pacific Gas and Electric Company
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	A	B	C	D	E	F
1	PY 2017 CARE Annual Report CARE Table 11 CARE Capitation Applications¹					
2						
3						
4	Entity	Total Received	Approved ²	Denied	Pending/ Never Completed	Duplicate
38	National Asian American Coalition	3	2	0	0	1
39	Oakland Citizens Committee for Urban Renewal	12	2	4	0	6
40	Project Access, Inc	3	1	0	0	2
41	REDI (Renewable Energy Development Institute)	11	6	2	0	3
42	Redwood Community Action Agency	6	2	2	0	2
43	Resources for Independence Central Valley	1	0	0	0	1
44	Rising Sun Energy Center	5	2	1	0	2
45	Sacred Heart Community Service	48	27	9	0	12
46	Second Harvest Food Bank of Santa Cruz and San Benito Counties	1	0	0	0	1
47	Self-Help for the Elderly	112	47	2	0	63
48	Tri-County Independent Living Center	2	2	0	0	0
49	UpValley Family Centers	4	1	0	0	3
50	Valley Oak Children's Services, Inc.	1	1	0	0	0
51	Yolo County Housing Authority	8	5	0	0	3
52	Yolo Family Resource Center	7	5	1	0	1
53	Total	1,716	952	302	0	462
54						
55	¹ Includes sub-metered customers.					
56	² Includes new enrollments only.					
57						

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	A	B	C	D	E	F	G
1	PY 2017 CARE Annual Report						
2	CARE Table 12						
3	CARE Expansion Program						
4							
5	Participating Facilities by Month						
6	2017	Gas			Electric		
7		CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
8	January	2,861	501	3,362	3,933	722	4,655
9	February	3,051	520	3,571	4,135	754	4,889
10	March	3,048	519	3,567	4,107	767	4,874
11	April	2,882	502	3,384	3,978	747	4,725
12	May	3,015	520	3,535	4,097	785	4,882
13	June	3,004	515	3,519	4,100	781	4,881
14	July	2,839	500	3,339	3,936	799	4,735
15	August	3,016	518	3,534	4,110	820	4,930
16	September	3,048	518	3,566	4,137	820	4,957
17	October	2,881	496	3,377	3,919	778	4,697
18	November	3,012	504	3,516	3,992	784	4,776
19	December	3,002	506	3,508	3,994	785	4,779
20							
21							
22	Average Monthly Gas / Electric Usage¹						
23	Customer	Gas	Electric				
24		Therms	KWh				
25	Residential Facilities	40	490				
26	Commercial Facilities	696	8,258				
27							
28							
29	CARE Expansion Self-Certification and Self-Recertification Applications						
30		Received	Approved	Denied	Pending/Never Completed	Duplicates	
31	Total	409	339	9	60	1	
32	Percentage		83%	2%	15%	0%	
33							
34							
35	¹ Excludes master meter usage.						

	A	B	C	D	E	F	G	H	I	J
1	PY 2017 CARE Annual Report CARE Table 13 CARE High Usage Verification Results⁵									
2										
3										
4	Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation⁶			Stage 3 - Usage Monitoring		
5	Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible)¹	Income Verified and Referred to ESA	Failed and Removed²	Ineligible³	Completed	Removed⁴	Appeals Denied	Appeals Approved
6	75,265	61,195	3,025	11,045	932	5,751	3,107	417	2	225
7										
8	¹ Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.									
9	² Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms.									
10	³ Includes customers who previously participated in ESA Program, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.									
11	⁴ Customers removed for exceeding 600% of baseline in any monthly billing cycle, after the 90-day grace period following ESA Participation.									
12	⁵ High usage is defined as a customer that exceeds 400% of baseline. Results as of March 31, 2018 (reflecting verification requests mailed in 2016 or 2017).									
13	⁶ Does not include 1,255 customers still pending ESA participation.									

	A	B	C	D	E	F	G	H	I
1	PY 2017 CARE Annual Report								
2	CARE Table 13A								
3	CARE Customer Usage and ESA Program Treatment								
4	# of CARE customers at or above 90th Percentile of Usage not subject to High Usage PEV ¹	Percent of those CARE customers not served by ESA Program ²	# of Enrollments led to ESA Program measure Installations	# of Long-Term tenancy CARE customers who have not applied for ESA Program ³	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment ⁴				Energy Usage of CARE customers who do not accept ESA Program treatment ⁴
5					Energy Usage before ESA Program treatment	Energy Usage within 3-months of ESA Program treatment	Energy Usage within 6-months of ESA Program treatment	Energy Usage within 12-months of ESA Program treatment	
6	27,916	57%	n/a	n/a	n/a	n/a	n/a	n/a	n/a
7									
8	1 Those CARE customers who have been on CARE rate at the same meter for at least six years.								
9	2 Those CARE customers who have not participated in the ESA Program prior to receiving targeted marketing.								
10	3 PG&E will implement "targeted marketing" to this group in 2018.								
11	4 This data will be tracked in PG&E's new ESA database, which went on-line in early 2018.								

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	A	B
1	PY 2017 CARE Annual Report CARE Table 14 Categorical Enrollment	
2		
3		
4	Type of Enrollment	Number of Customer Enrollments¹
5	Bureau of Indian Affairs General Assistance	351
6	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	64,476
7	CalWORKs/Temporary Assistance for Needy Families (TANF) ²	14,029
8	Head Start Income Eligible - (Tribal Only)	1,644
9	Healthy Families A&B	79,060
10	Low-income Home Energy Assistance Program (LIHEAP)	32,173
11	Medicaid/Medi-Cal	94,428
12	National School Lunch Program (NSLP) - Free Lunch	36,087
13	Supplemental Security Income (SSI)	43,052
14	Tribal TANF ²	n/a
15	Women, Infants, and Children Program (WIC)	31,874
16	¹ Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account. ² CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	
17		
18		