

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

Application of Southern California Edison
Company (U 338-E) 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)

A.14-11-009
A.14-11-010
A.14-11-011

**SOUTHERN CALIFORNIA EDISON COMPANY'S (U338-E) 2016 ANNUAL REPORT
FOR 2015 LOW INCOME PROGRAMS**

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Dated: **May 2, 2016**

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**SOUTHERN CALIFORNIA EDISON COMPANY'S (U338-E) 2016 ANNUAL REPORT
FOR 2015 LOW INCOME PROGRAMS**

Southern California Edison Company (SCE) hereby submits its Annual Progress Report for the Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE) Programs, and its Annual Progress Report for the Family Electric Rate Assistance (FERA) Program for the period January through December 2015. The information in this report supersedes all prior reports submitted by SCE.

Respectfully submitted,

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Attachment A

SCE's ESA and CARE Programs Annual Report for Program Year 2015



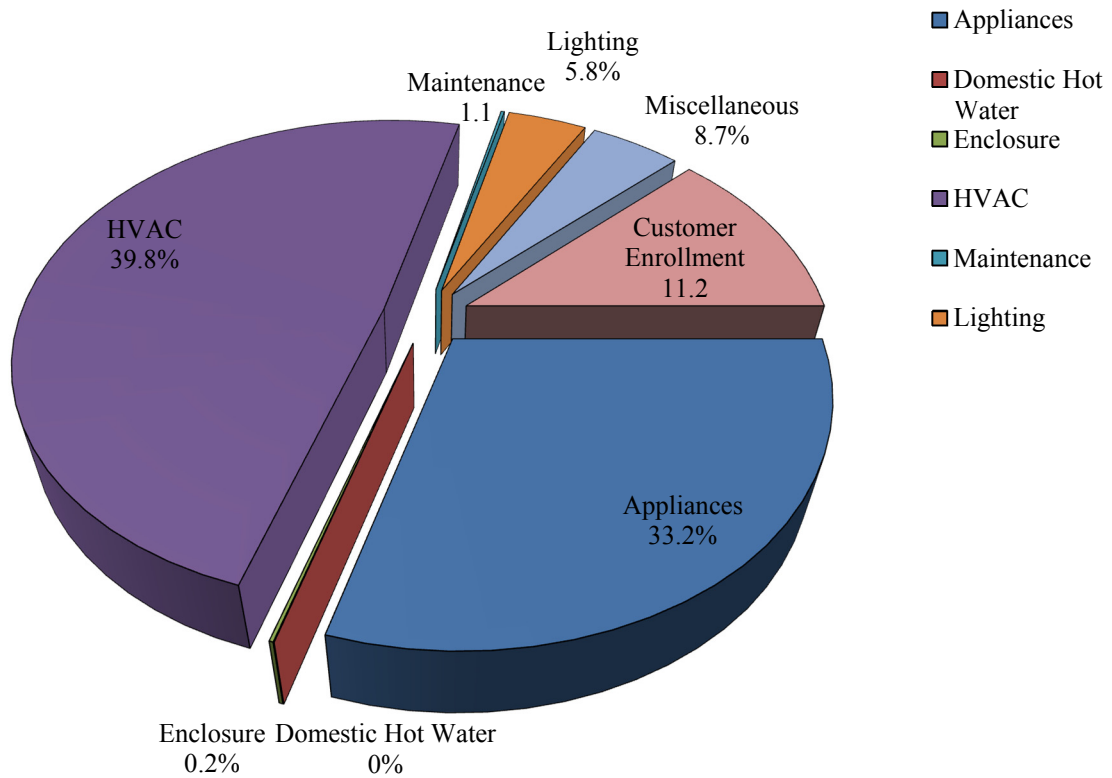
**Southern California Edison Company's
2015 Energy Savings Assistance (ESA)
And
California Alternate Rates for Energy (CARE)
Programs Annual Report**

May 1, 2016

2015 Energy Savings Assistance Program Summary			
2015	Authorized / Planning Assumptions	Actual	%
Budget	\$72,736,630	\$51,331,186	71%
Homes Treated	87,389	54,127	62%
kWh Saved	33,504,938	28,285,308	84%
kW Demand Reduced	7,539	4,416	59%
Therms Saved		N/A	

2015 CARE Program Summary			
2015	Authorized Budget	Actual	%
Administrative Expenses	\$7,019,650	\$4,771,387	68%
Subsidies and Benefits	\$416,800,000	\$372,593,533	89%
Service Establishment Charge	-	-	-
Total Program Costs and Discounts	\$423,819,650	\$377,364,921	89%
2015 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc.	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	34,621	154,036	78,621
2015 CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
Total Enrolled	1,499,342	1,281,620	85.5%

2015 ESA Program Expenditures by Measure Group



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1. Energy Savings Assistance Executive Summary

Provide an executive summary of the ESA program year:

SCE's Energy Savings Assistance (ESA) Program's objective is to help income qualified customers reduce their energy consumption and costs while increasing their health, comfort, and safety at no cost. Through the ESA Program, SCE offers a number of energy-efficient appliances to income-qualified customers, including energy-efficient refrigerators, air conditioners, as well as home efficiency solutions like weatherization that will help customers save energy and money every day. To be eligible for the program, customers must meet the program's income guidelines, which are established by the California Public Utilities (CPUC), and updated on an annual basis. Specific measures are authorized according to criteria observed in each home for existing appliances and feasibility of installation.

This report provides information on SCE's ESA Program accomplishments and expenditures for program year 2015. In 2015 the ESA program treated 54,127 homes representing 71% of its authorized budget. In addition, the ESA program saved 28,285 MWh. These savings were achieved by providing a mix of measures and services, including energy education, energy efficient appliances, and home weatherization.

There are three stages in the program. Each stage is delivered by respected community-based organizations (CBOs), faith-based organizations (FBOs) and established local private contractors under contract to SCE.

1. Enrollment & Assessment

SCE sends authorized service providers to visit customer homes to collect information about the home and the home's appliances. SCE then determines if customers are eligible for one or more measures or services, according to the following criteria:

- Customers must provide proof of income;
- Homeowners must provide proof of ownership; and
- The property owner's written permission must be obtained before renters can receive program services.

2. Installation

Any services deemed eligible will be referred to a qualified, licensed contractor for installation. The CPUC requires installers to:

- Complete all installations in accordance with the policies and procedures found in the California Installation Standards Manual;
- Meet or exceed existing codes and regulations; and
- Follow accepted building practices.

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3. Inspection

An independent inspections service provider performs an in-home inspection to ensure that installations under the ESA Program are completed in accordance with the standards established for the program. If the work does not meet program standards, it will be redone at no cost to the customer.

SCE's 2015 ESA Program operated in accordance with direction provided by the CPUC in Decision (D) 14-08-030, which "authorizes bridge funding for the IOUs' ESA and CARE Programs to continue for 12 months after the 2012-2014 cycle ends at the 2014 authorized budget level." SCE continued progress toward offering all eligible customers the opportunity to participate in ESA, and, for those who wish to participate, installing all cost-effective energy-efficiency measures in their residences by 2020.

1.1 Alignment of ESA Program with Strategic Plan Goals and Strategy

The long-term California Strategic Plan vision for the ESA program is to have 100% of all eligible and willing low income customers receive all cost effective measures by 2020. The Plan 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.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
1.1: Strengthen ESA outreach using segmentation analysis and social marketing tools.	<ul style="list-style-type: none"> Implement energy education designed to help customers understand and change behaviors in ways that support ESA savings. 	<ul style="list-style-type: none"> Partnered and integrated with other Income Qualified Programs, joint enrollment with investor-owned utility (IOU) counterparts, leveraged organizations that service clients with disabilities, and utilized self-certification. SCE contracts with both Community-Based Organizations (CBOs) and Faith-Based Organizations (FBOs) with existing ties to the disabled customer segment in SCE service territory.

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<p>1.2: Improve program delivery.</p>	<ul style="list-style-type: none"> • Use information from segmentation analysis to achieve efficiencies in program delivery. • Leverage with Local, State, and Federal agencies as well as other organizations to increase seamless coordination, efficiency and enrollment. 	<ul style="list-style-type: none"> • Implementation of the Joint Utility Datasharing Tool (DST), which is a tool developed by SCE and SoCalGas to share their respective ESAP participation data • Coordinated the development of the Joint Utility Customer Application (JUCA) with SoCalGas to eliminate duplicate work and further streamline the delivery of program services to eligible customer households. Implementation of JUCA is expected to occur during Q1 of 2016 • Coordinated the development of a joint Energy Education curriculum with SoCalGas to ensure that Program Reps are able to deliver a comprehensive Energy Education offering covering gas- and electricity-related topics • Developed and implemented an Invoice Scanning Project to electronically store all required enrollment documents within the EMAPS database. The efficiencies gained at the IOU and Service Provider level include a reduction in postage expenses, minimize the potential for lost paperwork and a reduction in the contractor invoicing end-to-end cycle.
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Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
1.3: Promote the growth of a trained ESA workforce.	<ul style="list-style-type: none"> • Implement ESA workforce education and training. • Coordinate resources for training related to ESA program needs to ensure delivery of ESA-trained resources to the program. 	<ul style="list-style-type: none"> • Three types of training were offered in 2015: home assessment training, back-office training, and CBT software training. This training was offered to employees from existing service providers to improve workforce skills and increase program efficiency. • SCE also enhanced the existing workforce training content for the home assessment training course, including instruction on time management skills, communications skills, customer service skills, and safety best practices. • Engaged directly with ESA Service Providers to foster “town hall” discussions about their current and future training needs

1.1.2 Please identify the IOU strategies employed in meeting Goal 2: ESA is an Energy Resource

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
2.1: Increase collaboration and leveraging of other low-income programs and services.	<ul style="list-style-type: none"> • Continue to expand partnerships with stakeholders and seek new opportunities for data sharing. 	<ul style="list-style-type: none"> • Coordination between CARE and ESA Programs to identify CARE customers with high energy usage for the purpose of enrolling the household in ESA • Leveraging with EAF to simplify enrollment into ESA Program • Continued use of the Joint Utility Datasharing Tool, which is a tool developed by SCE and SoCalGas to share their respective ESAP participation data.

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Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
2.2: Coordinate and communicate between ESA, energy efficiency and DSM programs to achieve service offerings that are seamless for the customer.	<ul style="list-style-type: none"> Continually reevaluate and update programs to take advantage of new technologies. Explore in-home displays; home area networks and/or “pay-as-you-go” technology to assist low income customers manage their use. 	<ul style="list-style-type: none"> During delivery of ESA, and where appropriate, customers were provided information on SCE’s DSM/EE programs including the Summer Discount Program Increased coordination between ESA and MIDI programs through the use of contractors shared by both programs to leverage the opportunity to enroll customers in MIDI that are not income-eligible for ESA in the same visit Single Family Affordable Homes (SASH) Program: SCE coordinates with the SASH contractor, Grid Alternatives (GA), to provide leads for low income households and to ensure that all homes that sign up for SASH are either previously treated or scheduled to be treated by ESA.
2.3: Provide low income customers with measures that result in the most savings in the ESA program.	<ul style="list-style-type: none"> Assess opportunities to incorporate new energy efficiency measures into the ESA program, e.g., plug-load reduction, new HVAC technology. 	<ul style="list-style-type: none"> SCE’s program design includes measures that increase the cost effectiveness of the program (CFLs, torchieres, pool pumps, and refrigerators), reduce energy bills, improve the quality of life of customers (cooling measures), and provide long term energy savings (refrigerators and cooling measures).
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	<ul style="list-style-type: none"> Evaluate approach determine whether additional segments are needed. 	<ul style="list-style-type: none"> The ESA Program refined the database to allow more efficient creation of ZIP Code-specific outreach and canvassing lists by the following metrics to target areas with the most eligible and willing households: ZIPs with high estimated ESA Program income eligibility

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Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
		<ul style="list-style-type: none">• CARE participants• Non-ESA Program participants• High energy users (CARE High Usage)

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1.2 Energy Assistance Savings Program Overview

1.2.1 *Provide a summary of the ESA Program elements as approved in Decision 12-08-044:*

Program Summary			
	Authorized / Planning Assumptions	Actual	%
Budget	\$72,736,630	\$51,331,186	71%
Homes Treated ^[1]	87,389	54,127	62%
kWh Saved	33,504,938	28,285,308	84%
kW Demand Reduced	7,539	4,416	59%
Therms Saved			

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).**

In 2015, SCE continued to utilize the Energy Management Assistance Partnership System (EMAPS), which is the database used to track program participation and to identify neighborhoods with a dense low-income population and low ESA program penetration. The database tracks the marketing and outreach tactics used in the various neighborhoods to evaluate effectiveness and provide guidance to our contractors/community-based organizations (CBOs/FBOs). Marketing efforts are staggered to address specific neighborhoods (small geographic areas or "ZIP7s") within SCE's service territory where city partnerships may have been established. In 2015, SCE collaborated with SoCalGas' ESA program to co-launch targeted communications in partnership with cities in the Western Riverside area – Hemet, Temecula, and Murrieta. In total, nearly 100,000 ESA program eligible customers received this mailer.

The ESA program continued to focus the majority of its marketing and outreach efforts on CARE customers who have not previously received ESA services. SCE's ESA program team strategically scheduled each

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marketing and outreach campaign to address specific neighborhoods within the service territory.

The ESA program aggregates leads in small geographic areas and then allocates the leads among service providers in a manner that engages the service provider in a full day's worth of work within a specific neighborhood. This method was used to manage the work throughout the funding cycle in order to distribute ESA work throughout the year for each ESA service provider. SCE partners with CBOs, FBOs, and private service providers to assess homes and deliver ESA Program services in local communities. ESA Table 5 lists contractors, activities, and actual expenses for SCE's ESA service providers, as well as Women, Minority, Disabled Veteran Business Enterprise (WMDVBE) status. Workload management is particularly important when taking into consideration that a majority of CBOs/FBOs delivering ESA Program services are small, independently-owned companies

As the Paperless Enrollment process with the use of the Tablet PC technology continues to mature and gains acceptance from service providers, the effectiveness of outreach will be maximized by allowing mobility in door-to-door canvassing. Increased mobility in canvassing allows ESA Program representatives to respond to customer requests for enrollment more quickly without the need to visit their respective offices. ESA Program representatives are able to sort leads based on ZIP-7 clusters to determine the order of customers to be visited. Through Paperless Enrollment, ESA Program representatives were able to determine customer's previous participation and eligibility while in the customer's home which eliminated wasted return visits. In 2015, 39 ESA Program representatives (formerly referred to as Assessors) from 4 different service providers used the paperless enrollment process to enroll 17,056 qualified customer households.

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 the Whole Neighborhood Approach to program outreach.

SCE is using various approaches to segment customers. For example, according to the 2013 ESA Program Multi-family Segmentation Study, 30 percent or approximately 1.2 million California households, meet the ESA Program's definition of the multi-family market--defined as properties with five or more units. This figure increases to 46 percent when adding properties with two to four units, which is the definition used for multi-family energy efficiency programs. With this

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in mind, SCE increased its integration efforts with other energy-efficiency programs targeting the multi-family sector such as the Middle Income Direct Install (MIDI) Program and developed a Single Point of Contact (SPOC). These integration efforts will continue to develop in future program years.

In 2015, SCE continued to leverage CARE's High Usage customers who have been identified as using 400%-600% above the baseline CARE rate. The ESA Program refers these customers out to contractors as leads with the intent of enrolling these households into the ESA Program and providing energy-saving services.

Another segmentation effort continued in 2015 consisted of five (4) Community Forums targeting the Latino, African American, Native American, and Pacific Islander segments. These Community Forums provided a wealth of information on programs and services available to customers, businesses, and non-profit organizations. This strategy builds program awareness at a grass-root and community level where many income-qualified households may connect.

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.*

In previous years, the ESA Program restricted its marketing and outreach efforts in response to concerns about limited funding and over-subscription. Other components of the ESA Program, in general, have not changed in terms of enrollment, assessment, energy audit, measure installations, and inspections. Specific improvements and system enhancements were developed related to bulk assignment of leads and installation jobs ensuring ESA Program representatives and work crews maintain a full day's worth of work and minimize the program's carbon footprint.

Utilizing Athens Research eligibility estimates has helped improve identification of underpenetrated areas within SCE's service territory and has served as the foundation of planned marketing and outreach efforts. The Customer Marketing Tool module helps to strategically group customers specific to a targeted effort; assists in gathering customers based on the criteria of particular efforts (Climate Zone, County, City, ZIP Code); and ultimately tracks the results of an effort. SCE continued its aggressive integration and partnering efforts between the ESA Program and various local governments and internal and external organizations that serve within the disabled community to

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increase program penetration and bring benefits to a wider range of customers.

SCE continued to strategize effective ways to enhance and improve current ESA Program deliveries and deploy effective marketing and outreach efforts to bring ESA services to underserved communities. While deploying the WNA strategy, SCE remains cognizant of the need to ensure that contractors throughout SCE's service area have sufficient and balanced demand for services. SCE also ensures that customers receive a timely response to ESA service requests even if they are not within a neighborhood currently being targeted through a WNA strategy.

In 2015, SCE and SoCalGas continued the use of the Joint Utility Datasharing Tool (DST) for use by their service providers. The DST provides visibility of enrollments completed by each respective utility so that service providers can more effectively coordinate the delivery of services and eliminate duplicate efforts, while ensuring compliance with the Modified Three Measure Minimum Rule.

1.4 ESA Customer Enrollment

1.4.1 *Distinguish between customers treated as “go backs” and brand new customers so that the Commission has a clear idea of how many new customers the IOUs are adding to the ESA program.*

Approximately 2 percent of the homes treated in 2015 are classified as “go backs.” These customers were identified as having received services between 1999 and 2001.

No. of Home Treated in 2015	No. of Service Accounts Treated in 2015 previously Treated in 1999-2001	Percentage of Go Back Homes
54,127	974	2%

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

Efforts to streamline the customer enrollment process included, but were not limited to:

- Households that met the income verification requirements for either CARE and/or the Energy Assistance Fund (EAF) are referred to service providers. Since these households' incomes have been verified by the respective program(s), the households

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are not required to provide additional income documentation in order to qualify for ESA enrollment.

- Customers that can provide documentation proving one or more household members currently participate in approved state or federal assistance programs do not need to provide additional income documentation in order to qualify for the ESA Program. The addition or deletion of programs approved for Categorical Eligibility is determined by the Commission.
- SCE leveraged the capabilities of the Schedule Manager and Routing Tool (SMART) module in its EMAPS database and implemented automated appointment reminders for customer installations scheduled through SMART. By automating reminders in this manner, fewer cancellations and wasted visits were reported by service providers.
- With the current Paper Enrollment process, previous participation and eligibility is determined when the Program Representative brings enrollment paperwork back to their respective service provider's office for validation. SCE has implemented a Paperless Enrollment process with the use of the Tablet PC technology that increases the effectiveness of outreach by allowing mobility in door-to-door canvassing and allows ESA Program Representatives to determine customer's previous participation and eligibility at the customer's home, which minimizes visits to ineligible homes. Furthermore, customers are enrolled in the program faster because they are not required to provide hard copies of income documents. The Paperless Enrollment software installed on the tablet PC provides immediate validation of customer data at the point of capture, and customer data is immediately transferred to SCE's customer database to determine measure eligibility. In addition, the software protects customers by removing sensitive customer information from the tablet PC upon successful transfer to SCE's customer database.
- SCE and SCG engaged in a "blueprinting" effort to examine their internal processes for the purpose of identifying areas of alignment that will generate increased efficiencies to enrollment procedures. The blueprinting effort has generated a number of efficiencies, including the implementation of a Joint Utility Datasharing Tool (DST), which allows the IOUs to share ESA Program participation data with service providers in the areas jointly served by both utilities. The sharing of participation in this manner allows service providers to more efficiently coordinate outreach efforts, while also ensuring compliance with the Modified Three Measure Minimum Rule.

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- The SCE/SoCalGas blueprinting effort also resulted in the implementation of a Joint Utility Property Owners Authorization form (POA). Implementation of the POA eliminates duplicate efforts and streamlines ESA enrollment for customers and property owners. This level of integration is in alignment with the Commission's directive to streamline enrollment through the creation of forms that are shared by all IOUs. In 2015, SCE and SoCalGas continued this level of integration to include the development of a Joint Utility Customer Application (JUCA), with implementation scheduled to occur in 1st Quarter of 2016.

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.

The ESA Program did not meet the 2015 annual goal of homes treated. In November 2014, SCE filed an application for approval that identified several programmatic barriers to goal attainment that were ripe for CPUC modification. While the CPUC did approve a bridge funding decision in January 2015 based on existing program rules, a final decision on whether identified mitigation for programmatic barriers will be removed are still undecided. The most significant programmatic barriers that SCE has identified to achieving the goals are described below:

- The Modified Three Measure Minimum (3MM) Rule impacted the reporting of homes treated. Many homes are denied measures due to the 3MM Rule, which requires they be assessed as eligible for a minimum number of measures, or generate sufficient energy savings, to receive program services. Many of these homes subsequently will be eligible for electric measures based on measures installed by the gas utility. These homes then will receive electric measures in 2015 through go-back visits and then can be classified as treated.
- As we near the end of the programmatic initiative to enroll all eligible and willing households into the ESA Program by 2020, it is becoming increasingly difficult to identify eligible households that have not been enrolled in the ESA Program and then engage those households. Because of previous program year successes, there are not large segments of the low income population that have not been outreached, but rather, smaller pockets within those segments that have not yet participated, or have previously been unwilling to participate. Outreach efforts to these households come with higher marketing costs due to the additional refinement required, while generating fewer enrollments.

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1.5 Disability Enrollment Efforts

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

In 2015, SCE continued its efforts to target low-income customers with disabilities and opportunities to work with disability-related community based organizations. For example:

In collaboration with SCE's Income Qualified Programs department and SCE's Consumer Affairs department, SCE actively distributed low income program-related brochures and pamphlets at twenty-one (21) events focused on the disabled community, including the Disability Rights California Symposium, the IEDC Disability Collaborative and the Special Olympics Summer Games. Active participation in these numerous events allowed SCE to further educate and provide awareness about the availability of program offerings and eligibility requirements.

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

Our marketing, education, and training efforts continue to identify segments more likely to include disabled customers through collaborations with organizations focused on the needs of the disabled community. SCE leverages disability-related information in its account system so that customer households interested in participating in the ESA Program, are identified as having at least one household member with a disability. In its training workshops delivered to ESA Service Providers, SCE includes guidelines on proper etiquette to observe when working with customers with disabilities. Through this approach, assessment and installation contractors are able to customize service delivery for households based on their needs.

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

Information on Enrollment of Customers with Disabilities			
Source	Total Enrollments	Disability Enrollments	% of Disability Enrollment
SCE Referral	21,210	3,139	15%
Joint Utility	35,588	5,033	14%
Outreach	21,106	3,123	15%

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Total	77,904	11,295	14.5%
Target Enrollment Rate			15%

1.5.4 *If participation from the disabled community is below the 15% goal, provide an explanation why:*

SCE was able to meet the programmatic initiative of increasing outreach efforts to the disabled community so that 15% of all new enrollments consist of households where at least one household member has a permanent disability.

1.6 Leveraging Success, Including LIHEAP

- As further detailed below, SCE continues to coordinate its ESA Program with programs outside of the IOUs, including LIHEAP that serves low income customers in an effort to reduce program costs, increase energy savings, and promote new customer enrollments. Measures of success include:
- *Reduce Program Costs.* 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).
- *Increase Energy Savings.* Leveraging efforts are measurable and quantifiable in terms of home energy benefits/savings to the eligible households.
- *New Customer Enrollments.* Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

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.*

SCE continues to partner with the Single-family Affordable Solar Homes (SASH) Program administered outside of the utility by Grid Alternatives. In specific, Grid Alternatives provides SCE with a list of homes determined to be eligible for SASH treatment. SCE ensures

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that the homes on the list are enrolled in the ESA Program and receive all eligible and feasible measures if they have not been previously enrolled. This ensures that the energy generated by the solar systems is not wasted by inefficient consumption.

SCE works closely with CBOs that operate multiple programs targeting low-income, disabled, senior, and/or other hard-to-reach population segments, leveraging the CBOs' existing and ongoing relationships with their respective client bases to increase customer awareness and overcome potential unwillingness to participate. For example, a number of CBOs delivering services to qualified customers for SCE's ESA Program also have contracts with CSD and/or LIHEAP, which allows customers to realize the benefits of a number of low-income programs.

SCE also contracts with service providers that serve other IOU ESA Programs. In areas jointly served by two utilities, contracting with the same service providers allows the IOUs to split the cost of educating the customer on energy efficiency practices and resources. This leveraging has been highly successful in the large number of jointly treated households resulting in the delivery of a more comprehensive set of services, while also ensuring compliance with the Modified 3MM Rule.

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.*

Many, perhaps most, of the benefits from leveraging with other external programs are not directly and/or feasibly quantifiable. For example, working with external programs has likely resulted in increased awareness of ESA, which leads to new enrollments. Perhaps more importantly, leveraging ESA in combination with multiple external programs also likely enhances the credibility of marketing for all programs involved helping to overcome the public perception that receiving "free" measures from ESA (or any other source) is too good to be true. This same barrier is also overcome--to some degree-- by the fact that the client may already have a trusting relationship with the external service provider and thus will be more likely to trust the ESA Program messaging.

SCE employs several service providers that also have contracts with Southern California Gas Company's ESA Program. This type of leveraging has multiple benefits, including reducing the number of contractor visits to a customer's home as compared to being enrolled

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by separate contractors for each utility with additional trips and expenses required to ensure compliance with the Modified 3MM Rule.

1.6.3 *Please provide a status of the leveraging effort with California Department of Community Services and Development (CSD). What new steps or programs have been implemented for this program year? What was the result in terms of new enrollments?*

A CSD/ESA collaborative project was created to address two closely related problems: LIHEAP contractors are typically unaware of homes previously serviced through ESA and what services have been installed until they actually do the assessment visit.

Similarly, ESA contractors are typically unaware of homes previously serviced through LIHEAP and what services have been installed. This wastes resources of both ESA and LIHEAP service providers pursuing previously treated homes that have no remaining feasible measures to be installed.

SCE enhanced its database to allow contractors working in both the LIHEAP and ESA programs to enter into SCE's Energy Management Assistance Partnership System (EMAPS) data on homes treated, services installed, and whether ESA services were installed. During 2015, SCE continued to discuss the best ways to share necessary data and reduce duplication of services.

1.7 Integration Success

According to Decision 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."

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

In 2015, the CARE Program identified customer households that had energy consumption in excess of 400% over their Tier 1 baseline allocation and coordinated with the ESA Program to expedite enrollment of these households into the ESA Program in support of Senate Bill No. 1207 (SB 1207). SB 1207 authorizes electrical corporations to require CARE Program participants with excessive

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energy usage (over 600% of baseline) to participate in the ESA Program. SB 1207 also authorizes electrical corporations to require these households, as a condition of their continue participation in CARE, to enroll in the ESA Program and reduce their energy consumption below 600% or be subject to removal from the CARE Program. Households with energy consumption exceeding 400% of baseline were selected so as to minimize the risk of removal from the CARE Program.

In addition, the ESA and CARE Programs continue to coordinate their respective marketing plans in order to create cross-enrollment opportunities where feasible. Program management from both ESA and CARE participate routinely in each other's marketing and outreach planning activities and share day-to-day operational information.

SCE also actively worked to resolve any disputes with the High Usage Appeals Board for customers that assert they should not be removed from the CARE rate. SCE works to ensure that customers receive a fair and balanced review for appeals.

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

The ESA Program increased its integration efforts with the Middle Income Direct Install (MIDI) Program by employing a single-enrollment approach involving contractors common to both programs. By employing service providers with experience in both programs, SCE was able to streamline enrollment into the MIDI Program for households that were unable to meet the income qualifications for the ESA Program without the need to schedule an additional visit. The existing ESA Program forms, including the Enrollment and Property Owner's Authorization forms, were revised to allow the customer household to be enrolled seamlessly into the appropriate program, with minimal disruptions to any existing enrollment processes.

SCE continued its coordination with other residential energy-efficiency programs such as the Energy Upgrade California Multifamily Pilot and Multifamily Energy Efficiency Rebate Program to ensure that messaging related to the ESA Program was included in each program's customer materials. Through integrated program offerings, the contractor is able to enroll households in the most appropriate program which enhances the value of both programs for potential participants.

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

ESA and Local Government Partnerships (LGP) staff continued to coordinate plans and schedules for outreach events. ESA staff regularly met with LGP staff to identify potential opportunities for integrating the respective programs. In addition, ESA program materials are always available to SCE's local public affairs representatives for distribution and discussion in conjunction with routine meetings with the public and officials.

1.7.4 *Describe the new efforts in program year to integrate and coordinate the ESA program with any additional Energy Efficiency Programs.*

SCE's ESA Program is a residential program. SCE focuses ESA integration with Energy Efficiency Residential Programs as discussed in Section 1.7.2 above.

1.7.5 *Describe the new efforts in program year to integrate and coordinate the ESA program with the Demand Response Programs.*

As part of its integration effort, the ESA Program provides information related to Demand Response programs such as the Summer Discount Plan (SDP) and Save Power Days in its educational materials so that ESA Program representatives can share this information with customers who meet the Modified 3MM Rule during Energy Education.

1.7.6 *Describe the new efforts in program year to integrate and coordinate the ESA program with the California Solar Initiative Programs.*

The low income portion of the California Solar Initiative is divided into the Single-Family Affordable Solar Housing (SASH) and Multifamily Affordable Solar Housing (MASH) programs. SASH is managed by a program manager outside of SCE, and therefore coordination with SASH falls under the "leveraging" umbrella and is described in Section 1.6.1 above. To the extent MASH funds are available, SCE's MASH program staff meets with multi-family housing organizations, contractors, tenants, building owners, and government officials to explain opportunities that may be available for eligible low income tenants through the ESA Program. These organizations partner with SCE in supporting both the MASH and ESA programs and assist in spreading the word about how

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communities and their low income residents can enroll and take advantage of SCE's income qualified programs as a whole.

1.8 Workforce Education & Training

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

During 2015, SCE continued its use of proven strategies to provide training on different aspects of the program to its Service Providers, which included installation contractors, Community-Based Organizations (CBOs), Faith-Based Organizations (FBOs), and vendors working in the program. SCE also engaged its Service Providers directly in order to better understand their individual training needs.

The training curriculum includes workshops providing instruction on topics including the policies and procedures for the various components of the program, back-office best practices and computer skills training. Workshops related to policies, procedures and best practices are instructor-led. Computer skills training is delivered through an online, computer-based system. The curriculum includes hands-on interactive workshops to ESA service providers in the use of EMAPS, which is the web-based database used to process and track program activity. The assessment training curriculum consists of a four-day training workshop that provides trainees with three days of comprehensive instruction on income documentation, customer and measure eligibility, and hands-on exercises. The fourth day consists of an extensive discussion of energy education-related topics and demonstrations used to gauge the participants' understanding of the material. The assessment training curriculum has also been updated to include instruction on the benefits associated with SmartConnect, specifically as it relates to the implementation of new functions and features available to customers, such as Budget Assistant and Save Power Day Events. Moving forward, the curriculum will continue to be updated to include information on other programs and services that can empower customers to reduce their electricity usage, and thereby lower their bills.

During 2015, SCE continued its use of online seminars ("webinars") as a low-cost alternative to face-to-face meetings. The use of webinars reduces the overhead and travel costs typically associated with face-to-face meetings and can be scheduled almost immediately. The use of webinars was most effective when delivering training related to

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changes to existing policies and procedures as it allowed all Service Providers to receive the same information.

SCE continued offering free on-line software training to employees of ESA Service Providers through the CBT Learning System. Courses included Microsoft Office, Windows Navigation, etc. An additional benefit of the CBT Learning System is that it is self-contained, meaning that users are not required to have purchased any software (e.g., Microsoft Office 2007) in order to gain skills for that course. During 2015, 104 users enrolled in the system and approximately 3000 different tutorials were completed.

During February 2015, SCE hosted representatives of ESA Service Providers at a Training Summit which was an all-day meeting to discuss their current and future training needs in a “town hall” setting. The Training Summit included a presentation by SCE on its training plans for the remainder of 2015, but also included breakout sessions amongst participants to share ideas on what improvements could be made. SCE plans to continue this direct engagement with ESA Service Providers in future program years.

During 2015, SCE and SoCalGas also engaged in a “blueprinting” effort to review existing internal processes related to the ESA Program for the purpose of identifying areas where processes could be aligned, and efficiencies gained. One of the aims of the blueprinting effort was to increase coordination amongst the respective training teams in order to streamline procedures where appropriate, to simplify the enrollment of customers into each utility’s ESA Program, and maximizing the benefits to customers in areas jointly served by SCE and SoCalGas. During 2015, the respective training teams of SCE and SoCalGas collaborated in the development of a joint curriculum for the Energy Education component in order to ensure consistent and unified messages for customer households receiving Energy Education in areas jointly served by SCE and SoCalGas. Full implementation of a joint Energy Education training is expected to occur in Q1 of 2016.

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

Many of the ESA program service providers, especially CBOs, are situated in low-income and disadvantaged communities and provide jobs within these communities. Currently, these organizations provide approximately 611 jobs that support the ESA program. SCE’s training includes:

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- Home Assessment Training – Offered to new employees hired by the ESA program service providers and required prior to employees conducting customer enrollment, income verification, and home assessment activities. In addition, trainees receive instruction on different approaches for the delivery of energy education.
- Back-Office Skills Training – Offered to the ESA program service providers' employees processing customer enrollment and conducting other program-related data entry tasks.
- CBT Learning System (Computer Skills Training) – Offered to existing and new employees. Workshop includes, but is not limited to, basic computer skills and utilizing tools such as Microsoft Word, Excel and PowerPoint.

Type of training or recruitment conducted	Employees trained	Employees hired
Home Assessment Training	151	1382
Computer Skills Training	104	

1.9 Legislative Lighting Requirements Status

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

The ESA program has not experienced any Compact Florescent Light bulb (CFL) supply issues and does not anticipate any future issues. In the Testimony in support of its 2015-2017 funding application, SCE proposed to phase out the installation of CFLs during the 2015 program year, and proposes to add LED A-Lamps as a new measure in 2016.

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

The ESA home energy education program for customers meeting the Modified 3MM Rule includes information about the proper disposal of CFLs. The information includes:

- The energy savings benefits associated with replacing incandescent light bulbs with CFLs.

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- Information regarding mercury in CFLs, a toxic substance that can be harmful if not appropriately handled.
- Instructions for the proper procedures for collecting and disposing burned-out and broken CFLs, such as placing them in a sealed plastic bag and taking them to a local recycling center or contacting a local hazardous waste agency for local recycling options.

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.*

Traditionally, the electric IOUs have procured CFLs and other lighting measures independently of each other. For the 2012-2014 program cycle and subsequent bridge funding period, the electric IOUs coordinated the procurement of the CFLs in order to obtain the highest quality at the lowest possible price. Each IOU remained responsible for contracting with the successful bidder to authorize the purchase of CFLs.

The successful lighting supplier was selected based on product availability, quality, pricing, experience, warranty, location, and warehousing. As part of the procurement process, SCE requires the supplier to maintain at least 30 days of product for all service providers and deliver product to the service providers' facilities within 14 days from the order date.

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*

Very little activity on studies occurred in 2015. The information in Section 1.10 corresponds to what was included in last year's report and includes proposed studies and activities conducted during 2015. While SCE used prior studies in developing the November 2014 application to the Commission, 2015, was a bridge year and any new studies have not been approved for new funding by the Commission.

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As per direction in Decision (D.)14-08-030, there are several new or continued studies that will be considered for approval once the final application is approved. These studies being considered by the Commission are: (1) A Low Income Needs Assessment Study (LINA); (2) an impact evaluation of the 2015 ESA Program; (3) a phase II ESA energy education study; and (4) an IOU proposed fourth study evaluating non-energy benefits and equity criteria. Although the above-referenced studies have not been authorized, based on Energy Division direction, the IOUs proceeded to bid out two time-sensitive studies in 2015 during the bridge year. The two studies are: (1) The Low Income Needs Assessment required as per statute to be completed by December 2016; and (2) the Impact Evaluation. Current ESA impacts are necessary for planning the next program cycle to ensure there is sufficient time to get study results that can be included in the next application cycle which is expected to be due in 2017, if prior Commission schedules are followed.

Table 1.10.1 provides an overview of the proposed 2015-17 Studies.

TABLE 1.10.1: 2015-2017 LOW INCOME PROGRAM STUDIES

Proposed Studies ¹	Lead Consultant	Managing Utility	Project Initiation	Public Meetings	Final Report Due
Low Income Needs Assessment Study	Evergreen Economics	SCE	11/23/2015	5/13/2015 1/28/2016	12/2016
ESA PY2015 Impact Evaluation	TBD	SCG	TBD	TBD	TBD
Phase II ESA Energy Education Study	TBD	PG&E	TBD	TBD	TBD
Non-Energy Benefits and Equity Criteria Evaluation	TBD	SDG&E	TBD	TBD	TBD

Joint Utility² Low Income Needs Assessment Study

¹ These studies were proposed in SCE's 2015-17 Application (A.14-11-007). None have been authorized or received new funding, pending a 2015-2017 Decision. However, ED requested that work start on the Needs Assessment and Impact Evaluation due to their critical deadlines. No work was conducted on the Phase II Energy Education or Non-Energy Benefits and Equity Criteria Evaluation during 2015.

² The Joint Utilities are PG&E, Southern California Edison Company (SCE), Southern California Gas Company (SCG), and San Diego Gas and Electric Company (SDG&E).

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Pursuant to the AB 327 requirement for a triennial needs assessment study, (D.)14-08-030 requested the IOUs' applications include a proposal for a Low Income Needs Assessment (LINA) Study including several key topic areas. The Low Income Needs Assessment is directed and overseen by members of the participating IOUs and Energy Division (ED). SCE serves as study team³ coordination lead and contract manager with the Energy Division serving as the overall lead on the project. An initial public workshop was initiated by SCE and conducted on behalf of the study team on May 13, 2015. The workshop included discussion of general topic areas included in D.14-08-030 (Appendix Q: Guidance Document) and was intended to assist in developing the scope of work for the 2016 LINA. A Request for Proposals (RFP) was developed following the workshop. The RFP was released on July 22, 2015 through a competitive bidding process. The contract was awarded to Evergreen Economics in October 2015. The contractor began work in November 2015. The activities conducted during November and December of 2015 focused on developing the research plan. A Public Meeting to discuss the Research Plan was held on January 28, 2016.

The overall study objective for the Low Income Needs Assessment is to provide information on the needs of the low-income customers eligible for the ESA and CARE Programs. The 2016 Needs Assessment is the third in a series of such studies required by CPUC Decision 14-08-030. The key topic areas to be examined in the 2016 LINA are energy burden and insecurity; beneficial energy efficiency (and other) measures; and unique customer needs and income documentation. The Final Report will be completed in December 2016.

Joint Utility 2015 ESA Program Impact Evaluation

The Impact Evaluation is a statewide study managed by Southern California Gas Company

A Request for Proposals to perform the ESA Impact Evaluation was released on November 16, 2015, and was awarded in February 2016. A Final Report on 2015 Impacts is anticipated to be completed in Q1 2017, with updated analysis for 2016 impacts provided in Q1 2018 and 2017 impacts in Q1 2019.

The primary objective of this evaluation is to estimate first-year electric and gas savings and coincident peak demand reduction attributable to the 2015 ESA program. The results will be used to quantify the 2015 program achievements, document the relative value of various measures in producing energy savings, produce savings forecasts, and meet filing and reporting requirements (including informing the development of the 2018-2020 ESA Program Application).

1.10.1 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 final reports were completed in 2015. SCE paid invoices for work conducted in November and December of 2015. The proposed study budgets are included in Table 1.10.2.

³ The study team includes a member of each of the participating IOUs and Energy Division.

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TABLE 1.10.2: 2015-2017 PROPOSED STUDIES:

Study	Lead Consultant	Managing Utility	Budget Proposed⁴	SCE Budget⁵	% Expended
Low Income Needs Assessment Study	Evergreen Economics	SCE	\$500,000	\$150,000	7% ⁶
ESA PY2011 Impact Evaluation	TBD	SCG	\$550,000	\$165,000	0
Phase II ESA Energy Education Study		PG&E	\$350,000	\$105,000	0
Non-Energy Benefits and Equity Criteria Evaluation		SDG&E	\$150,000	\$45,000	0

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.

All four Statewide Joint IOU studies were completed in 2013 and final reports are available at www.energydataweb.com as well as www.calmac.org. Budgets spent compared to authorized budgets are included in Table 1.10.2

⁴ The budgets reflect IOU proposed budgets pending a 2015-17 Decision. Bridge funding is currently being used to pay for work completed pending the 2015-17 Decision.

⁵ The statewide cost allocations for the studies are: SCE 30%, PG&E 30%, SDG&E 15%, and SCG 25%.

⁶ This reflects what was spent during 2015 and includes expenses against the total statewide budget (not SCE portion only). The other IOUs have not been cross-billed for their portion.

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**TABLE 1.10.2: 2012-2014 ESA PROGRAM STUDIES:
AUTHORIZED VS. EXPENSED BUDGETS**

Study	Lead Consultant	Managing Utility	Budget Authorized ⁷	Budget Expensed	%
Multifamily Segment Study	The Cadmus Group, Inc.	PG&E	\$400,000	\$399,340	100%
ESA Energy Education Study	Hiner & Partners, Inc.	SCE	\$300,000	\$217,195 ⁸	72%
Low Income Needs Assessment Study	Evergreen Economics	SCE	\$700,000	\$699,997	100%
ESA PY2011 Impact Evaluation	Evergreen Economics	SDG&E	\$600,000	\$489,364	82%

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).*

SCE did not conduct pilots in 2015.

1.11.2 *If applicable, submit Final Pilot Report describing: 1) Overview of pilot; 2) Description of Pilot Evaluation Plan (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.*

Not applicable. Please see the answer to Question 1.11.1 above.

1.12 “Add Back” Measures

For measures that fall below the cost effectiveness threshold under Decision 08-11-031, we require additional reporting to show the cost, energy savings impacts, and related metrics.

SCE has provided the required reporting on “Add Back” measures in ESA Table 16. These measures were “added back” by the Commission in

⁷ This amount represents the total authorized Joint Utility study budget. The authorized Joint Utility budget split is: PG&E--30%, SCE--30%, SCG--25%, and SDG&E--15%.

⁸ The expensed amount reported does not include the final invoice which is expected to bring the total to the contracted amount of \$250,764 for the Energy Education Study.

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Ordering Paragraphs: 41 (Envelope & Air Sealing), 45 (Central AC), 46 (Room AC), 48 (Heat Pumps), and 52 (Central AC Service) in D.12-08-044.

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

Providing these “add-back” measures has not compromised SCE’s ability to meet the 2020 Strategic Plan goal.

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2. CARE Executive Summary

SCE's California Alternate Rates for Energy (CARE) program provides extensive outreach to income-eligible households to encourage enrollment in the CARE Program. CARE provides a monthly discount on energy bills for income-qualified customers within residential single-family households, sub metered residential facilities, nonprofit group living facilities, agricultural employee housing facilities, and migrant farm worker housing centers.

This report provides information on SCE's CARE program accomplishments and expenditures for 2015. At year-end of 2015 1,281,620 customers were on the CARE rate, resulting in a penetration rate of 85.5%. SCE continues to work towards meeting the Commission's directed CARE Program goals and objectives.

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% or more in the number of participants.*

TABLE 1		
Residential CARE Program Customers by Month (electric usage)		
2015	CARE Customers	Percentage Change
January	1,301,585	-
February	1,296,351	-0.3%
March	1,293,148	-0.2%
April	1,287,808	-0.4%
May	1,285,877	-0.1%
June	1,285,934	0.0%
July	1,289,461	0.2%
August	1,288,472	-0.1%
September	1,294,962	0.4%
October	1,280,727	-0.9%
November	1,284,468	0.2%
December	1,281,620	-0.2%

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

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.

SCE and the other California IOUs used the joint utility methodology adopted by the CPUC in D.01-03-028 to develop quarterly and monthly penetration estimates for use in 2015. This method involves 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.

Sources for the estimation include the CPUC’s current guidelines; current year small area vendor marginal distributions on household characteristics; Census Public Use Microdata Survey (PUMS) 2000 and PUMS 2007-2011 sample data; utility meter and master meter household counts, Department of Finance CPI series; and various GIS 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 (ACS) 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. Each quarter the utility 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.

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

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

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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 PUMS data, ACS Data, and California Employment Development Department county and MSA 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.

A refinement in 2007 made use of Census Advance Query, PUMS, and Summary File (SF) 3 tabulations to develop estimates specific to “payer types:” i.e. individually metered, sub-metered, and non-sub-metered master meters.

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

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).*

See SCE’s response above to Question 2.1.2.1 above. CARE eligibility rates by small and large area are developed so that they apply to individually metered and sub-metered households only. Additionally, as the utilities apply these rates in successive quarters, they are applied to individually metered and sub-metered household counts for a given quarter.

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

See SCE’s response above to Question 2.1.2.1. Note that the methodology is based on estimating small area (block group) level household (size-by-income-by-household-age)

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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.

At each month's end, individually metered service accounts, or low income tenants at sub-metered residential facilities are counted.

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

CARE-participating residential households were divided by the estimated number of CARE-eligible households to calculate a penetration rate.

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

The estimate of current demographic CARE-eligible rates by energy source at year-end is 34 percent

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

The estimate of current CARE-eligible sub-metered tenants of master-meter customers by energy source at year-end is 4,541.

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

The current CARE sub-metered tenant count by energy source at year-end is 1,430.

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

The current CARE sub-metered penetration rates by energy source at year-end is 31 percent.

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

SCE continues to directly contact sub-metered tenants to expedite the recertification of CARE and Family Electric Rate Assistance (FERA). This approach has proven to be more effective than the previous tactic of solely approaching the mobile home park owners/managers in increasing tenant enrollments/recertification.

SCE generates a list of CARE and FERA tenants for owners/managers of master-meter accounts on a monthly basis. This process assists the customer with reconciling their SCE bill and number of tenants for the bill period, as well as providing the customer with the ability to identify any possible discrepancies with the number of eligible tenants for that bill period.

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2.2 CARE Program Summary

2.2.1 Please provide CARE program summary costs.

CARE Budget Categories	Authorized Budget	Total Expenditures	% of Budget Spent
Outreach (Includes Automatic Enrollment)	\$2,613,000	\$2,122,786	81.2%
Processing, Certification, Recertification	\$588,000	\$812,583	138.2%
Post Enrollment Verification	\$1,423,650	\$518,627	36.4%
Information Tech./Programming	\$1,000,000	\$234,152	23.4%
Pilots ^[3]	\$216,000	\$258,582	119.7%
Measurement and Evaluation	\$50,000	\$3,871	7.7%
Regulatory Compliance	\$264,000	\$392,855	148.8%
General Administration	\$725,000	\$351,406	48.5%
CPUC Energy Division Staff	\$140,000	\$76,526	54.7%
Cooling Centers ^[1]	N/A	N/A	N/A
Total Expenses	\$7,019,650	\$4,771,387	68.0%
Subsidies and Benefits ^{[2][3]}	\$416,800,000	\$372,593,533	89.4%
Total Program Costs and Discounts	\$423,819,650	\$377,364,921	89.0%

^[1] SCE's authorized Cool Center budget is not part of the CARE budget.

^[2] Subsidies and benefits include rate discounts.

^[3] This cost is for the CHANGES pilot program (outreach, education, need and dispute resolution services to limited English proficient customers in California).

2.2.2 Please provide the CARE program penetration rate to date.

CARE Penetration			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
1,281,620	1,499,342	85.5%	No

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.

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SCE received no recertification complaints in 2015. The complaints and resolutions are as follows:

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.*

The average monthly discount per CARE customer was \$23.99.

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

The annual subsidy (discount) for all CARE residential program customers was \$372,593,533.

2.3.2 *Administrative Cost*

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

See Section 2.2.1.

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

The requested information is provided in the table below:

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CARE Administrative Cost Category	Description
Outreach	Includes: Bill inserts, advertising, applications (printing and mailing), posters, brochures, flyers, postage, other outreach, staff labor, costs related to out bound dialing, 800#, and Capitation Fee Project.
Processing, Certification, Recertification	Includes: Staff labor, information technology, application processing, training, programming labor, and sub-meter certification.
Post Enrollment Verification	Includes: Staff labor, information technology, verification processing, training, programming labor, and sub-meter verification.
Information Technology/ Programming	Includes: Programming and labor costs associated with system enhancements, Decision compliance, and maintenance of existing processes.
Measurement & Evaluation	Needs Assessment Study
Regulatory Compliance	Includes: Applications, testimony, advice filings, comments and reply comments, hearings, reports and studies, working group meetings, public input meetings, and tariff revisions.
General Administration	Includes: Office supplies, market research, program management labor (including pensions and benefits), and technical support and software licensing.
CPUC Energy Division Staff	Includes: CPUC Energy Division Staff expenditures.

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

In D.02-09-021, the CPUC required SCE to establish the CARE balancing account (CBA), effective January 1, 2002. The balance in the CBA as of December 31, 2015 was \$20.52 million.

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

SCE does not recover CARE-related costs in base rates. In D.97-08-056, the CPUC allocated SCE's administration costs associated with

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the CARE Program to SCE's Public Purpose Programs rate component. D.02-09-021⁹ required SCE to establish a CARE balancing account (CBA) to record the following on a monthly basis: (1) the difference between CARE discounts provided to CARE-eligible customers and CARE surcharges billed to non-CARE customers, (2) the difference between the authorized CARE and Family Electric Rate Assistance (FERA) administration amounts and actual incurred CARE and FERA administration expenses, (3) costs associated with the CARE automatic enrollment program, and (4) costs associated with the Energy Division's audit of SCE's CARE program.

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.*

CARE Surcharge and Revenue Collected by Customer Class (2015)					
Customer Class	Average Monthly CARE Surcharge	Average Monthly Bill	CARE Surcharge as Percent of Bill	Total Annual CARE Surcharge Revenue Collected	Percentage of Total Annual CARE Surcharge Revenue Collected
Residential ¹	\$9,499,584	\$418,955,409	2.3%	\$113,995,003	27.9%
Agricultural	\$819,011	\$21,659,207	3.8%	\$9,828,138	2.4%
Commercial	\$18,524,564	\$488,202,712	3.8%	\$222,294,766	54.4%
Industrial	\$3,352,147	\$60,557,420	5.5%	\$40,225,760	9.8%
Public Authority	\$1,837,300	\$46,639,613	3.9%	\$22,047,602	5.4%
Railroads	\$34,695	\$1,030,078	3.4%	\$416,343	0.1%
Interdepartmental ²	\$0	\$12,485	0.0%	\$0	0.0%
Totals	\$34,067,301	\$1,037,056,923	3.3%	\$408,807,613	100.0%

¹ Excludes CARE customers

² Electricity supplied for Edison-owned water & gas operations on Santa Catalina Island

⁹ D.06-12-038 and Advice 2079-E authorized SCE to eliminate the entry associated with recording CARE balancing account (CBA)-related retail revenue and include an entry to allow for the transfer of the year-end balance recorded in the CBA to the Public Purpose Programs Adjustment Mechanism (PPAM).

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2.4 Outreach

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

The CARE and Family Electric Rate Assistance (FERA) programs' outreach efforts and communications to SCE's in-language and under-penetrated areas continued to be a priority. SCE's CARE/FERA programs partner with internal SCE departments such as Public Affairs, Consumer Affairs, Customer Experience Management, Corporate Communications, Community Involvement, Speakers Bureau, employee volunteer-based Resource Groups, as well as external organizations and various chambers, foundations, faith-based organizations and CBOs in outreach activities that target SCE's hard-to-reach customer base.

SCE's goal is to enroll as many eligible customers as are willing to participate in CARE. CARE enrollment decreased from 1,311,210 on December 31, 2014, to 1,281,620 on December 31, 2015, which represents a net decrease of 29,590.

Throughout the year, SCE hosted four "Helping our Customers Succeed" Community Forums targeting the Latino, African American, Native American, and Pacific Islander populations. These Forums provide a wealth of information on programs and services, including CARE/FERA and Energy Savings Assistance Program, available to customers, businesses, and non-profit organizations. This strategy builds program awareness at a grassroots and community level where many income-qualified households may connect.

Date	Location
March 6, 2015	Irwindale
May 21, 2015	Santa Clarita
August 14, 2015	Fullerton
September 16, 2015	Culver City

In 2015, SCE participated in nearly 140 community events targeting customers seeking information on bill payment and assistance through rate assistance and energy savings. At events including--but not limited to--Martin Luther King and Black History Month celebrations, senior and faith-based community events, Earth Day festivals, Winter festivals, and the Los Angeles County Fair, more than 31,000 customers received information on CARE/FERA and Energy Savings Assistance Program as ways to help lower their energy usage and

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ultimately their electric bill.

CHANGES

On November 19, 2010, the Commission approved Resolution CSID-004, a one-year pilot program named Community Help and Awareness with Natural Gas and Electricity Services (CHANGES), which has been subsequently extended through 2017, to provide limited English speaking customers in-language education, needs and dispute resolution, and outreach for energy issues. The program is administered through the same community contractor, Self Help for the Elderly (SHE) and 22 CBOs, which also administer the CPUC's Telecommunications Education and Assistance in Multiple-Languages (TEAM) program.

Of the 22 organizations in the program, five are in SCE's service territory. The five organizations serving SCE's territory include: Asian American Educational & Cultural Center, Inc., Delhi Center, El Concilio del Condado de Ventura, Vietnamese Community of Orange County, Inc., and YMCA of Greater Long Beach. The Resolution directs the pilot to be funded by SCE, PG&E, SDG&E and SoCalGas, through CARE outreach program funding.

Although CHANGES is currently operating as a pilot program, the CPUC authorized it as an ongoing program in Decision 15-12-047, adopted on December 15, 2015.

The CHANGES program includes three in-language components: education, dispute and need resolution, and outreach.

1. Education: The education component includes trainings, workshops, or one-to-one technical assistance for customers on various topics. Some of the topics covered include: avoiding disconnections, payment arrangements, assistance programs available, how to read a utility bill, tiered rates, and energy conservation.
2. Dispute and Need Resolution: CBOs work directly with customers and utilities to assist with issues such as bill inquiries, payment arrangements, avoidance of service disconnections, and restoration of service. The current CHANGES program provides assistance in 21 languages.
3. Outreach: CBOs leverage the existing TEAM outreach activities as an opportunity to introduce information about CHANGES, provide new energy-related materials, and market the program via various media outlets.

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Based on the program administrator's monthly reports, CHANGES completed the following activities for SCE (January-December 2015):

Component (in language)	Activity
Community Events:	
Chinese English Ilokano Japanese Korean Spanish Tagalog Vietnamese	CBOs did outreach and distributed materials at several local events
Media:	
<u>Television</u> <u>Dari</u>	Zarin TV
<u>Radio</u> Chinese	Heavenly Rainbow AM1430
Vietnamese	Bolsa Radio
<u>Print</u> ¹⁰ Spanish – reached over 145,000 Chinese – reached over 55,000 Korean – reached over 1,265,000 English – reached over 10,000 Tagalog – reached over 2,050,000 Japanese – reached over 15,000 Vietnamese – reached over 30,000	Asian Journal Chinese Christian Herald Crusades El Clasificado Japanese Daily Sun Korea Daily Korea Times LA Midweek Asian Journal RafuShimpo Tribune U.S.A. The U.S. Asian Report Viet American Weekly Vietnamese Magazine Weekend Balita
Consumer Education: By Topic	
Armenian Cantonese	CBOs provided small workshops (workshop topics include: Understanding Your Bill,

¹⁰ This information was retrieved from the monthly data report that the CHANGES program administrator, Self Help for the Elderly (SHE), submits to SCE.

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English Ilokano Indonesian Japanese Korean Mandarin Spanish Tagalog Vietnamese	Safety Tips, Level Pay Plan, Energy Conservation, CARE/FERA and Other Assistance Programs, Avoiding Disconnection, and High Energy Use) and one-to-one education with 8,945 SCE SCG customers.
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Marketing

In order to continue to offer relevant solutions to income-qualified customers, SCE deployed the following integrated efforts:

- Income qualified programs and other assistance programs (CARE, FERA, ESA, Level Pay Plan and Medical Baseline) were featured in customers' monthly electric bill 'onserts' – pre-printed newsletter-type communications – with articles providing resources to help reduce their electricity bills.
- Throughout 2015, SCE continued to reach out potentially eligible non-CARE customers in an effort to enroll them in CARE. Targeted direct to consumer mailings were sent to households on a quarterly basis, leveraging advanced analytics based on previous responses to fine-tune the targeting process.
- In Q4, SCE tested a targeted mailer to customers indicating a preference to Chinese or Vietnamese language communications. As a result of this effort, more than 1,400 new CARE households were enrolled into the program.
- As part of the CARE annual solicitation process in June 2015, SCE included CARE enrollment applications in the bills of nearly 3 million customers receiving a paper bill (not receiving bills on-line). Because of this effort, more than 12,000 new households began receiving the CARE rate discount.
- SCE's Customer Communications Organization within SCE's Call Centers continues to utilize the on-line CARE enrollment application at www.sce.com to directly enroll customers into the CARE program over the phone or offer the option to send a CARE application to the customer. In 2015, 78,183 eligible low-income customers were enrolled through Call Center outreach efforts. (This includes all web enrollments and Call Center-mailed applications.)

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- CARE enrollment is coordinated with other low-income programs such as ESA, LIHEAP, SoCalGas income qualified programs and certain water utilities. Each month, ESA participants are automatically enrolled in CARE and LIHEAP participants are automatically enrolled in CARE quarterly. In 2015, 33,584 eligible customers were enrolled in CARE through the data sharing with LIHEAP, ESA, SoCalGas, water utilities and SCE's EAF Program. The CARE Program continuously integrates its efforts and messaging with the ESA program at all outreach events, communications, and marketing campaigns.
- The CARE/FERA Capitation Fee Program team is continuing its efforts to re-engage existing Capitation agencies while strategically registering additional contractors to overcome enrollment barriers, including language, culture, and special needs, as a means of enrolling the hardest-to-reach customers. As a result of these efforts, the Capitation Fee Program continues to show increased enrollments from agencies that were previously inactive. In 2015, capitation contractors successfully enrolled 2,998 new customers in the CARE Program.
- SCE enrolls new CARE customers through the Energy Assistance Fund (EAF), a program that provides utility payment assistance through voluntary customer, employee, and SCE shareholder donations. The EAF income requirements are the same as CARE's. In 2015, nearly 1,037 EAF recipients were enrolled in the CARE program.

Social Media

Social media continues to be a tactic that SCE uses to target appropriate customers who utilize Facebook, Twitter, or other forms of social media. Outreach efforts included:

- Social media for Income Qualified Programs via Facebook and Twitter to increase awareness and participation in CARE/FERA and ESA.
- Ran ads on Facebook and Twitter in Q4 in both English and Spanish, targeting users who were also on the CARE customer email list to leverage frequency.
- Inside Edison story in Q2, featuring a CARE customer's personal experience, to help resonate with other customers
- In total, there were:
 - Nearly 700,000 impressions
 - About 6,400 website clicks
 - 80 Page Likes
- 970 Post "Likes"

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- 50 “Comments”
- 125 “Shares” and “Retweets”

Paid Media (Advertising)

The CARE/ESAP/FERA advertising campaign consisted of desktop display, mobile display, Search Engine Marketing (SEM - ads which appear on the result pages of search engines such as Google based on customers’ previous searches) and Asian print. SEM launched end of September and desktop display launched end of October. Overall campaign delivered 41,425,810 impressions in 2015

- The SEM targeted all customers throughout the SCE service territory. SEM delivered 201,871 impressions, 3,782 clicks and a 1.87% click-through rate (CTR).
- Desktop display and mobile placements were targeted to General Market, Asian, and Hispanic segments. Asian and Hispanic digital media launched mid-November. The desktop display and mobile display campaigns delivered a total of 36.9 million impressions and 27,567 clicks.
- Asian Print was included in order to extend reach into low income Asian communities and reach those with limited access to digital media. 4.2 million impressions were delivered through 70 total insertions in over 10 papers.

General Market

The Advertising campaign ran mid-October through mid-December 2015 and included targeted digital media. General Market media delivered a total of 12,393,934 impressions.

- **On-line**
Desktop display and mobile advertising was placed through Maxpoint, a top performing ad-network used on past SCE campaigns. CARE, ESAP, and Joint creatives ran on both Desktop and Mobile placements. Desktop placements delivered 2,212,508 impressions and a Click-Through-Rate (CTR – percentage of customers who click on the ad) of 0.12%. Mobile placements delivered 10,181,426 impressions and a CTR of 0.09%. 10,107 visits to the site can be attributed to the on-line advertising campaign.

A brief summary of total audience reach is as follows:

Total On-line Impressions 12,393,934

Asian

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Advertising campaign targeting Asian households ran November through mid-December and included targeted digital and print media. Asian media delivered a total of 16,497,687 impressions.

- **On-line**

On-line advertising included mobile placements on Maxpoint. Digital placements were delivered in-language to Cambodian, Chinese, Filipino, Korean and Vietnamese audiences promoting both CARE and ESA programs. The digital campaign delivered 12,238,031 impressions and a CTR of 0.08%. 8,473 visits to the site can be attributed to the on-line advertising campaign.

- **Print**

A mix of Chinese, Korean, Vietnamese and Filipino publications was used. Asian publications included *World Journal*, *Sing Tao*, *Korea Times*, *Korea Daily*, *Nguoi Viet*, *Viet Bao*, *Balita*, *Asian Journal* and *California Journal*.

- Total Insertions: 70
- Total Impressions: 4,259,656

A brief summary of total audience reach is as follows:

Total Print Impressions: 4,259,656

Total On-line Impressions: 12,238,031

Total Impressions: 16,497,687

Hispanic

An ad campaign in Spanish ran November through mid-December 2015 and included targeted digital display and mobile media placements. Hispanic media delivered a total of 12,332,318 impressions.

- **On-line**

Desktop display and mobile banners ran on Maxpoint. Desktop display delivered 2,212,471 impressions and a CTR of 0.05%. Mobile placements delivered 10,119,847 impressions and a CTR of 0.04%. 4,852 visits to the site can be attributed to the on-line advertising campaign.

A brief summary of total audience reach is as follows:

Total On-line Impressions 12,332,318

Earned Media (PR and Outreach)

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Earned Media (PR and Outreach) coverage of CARE/FERA Programs (including the Energy Savings Assistance Program and Medical Baseline Program) was generated in 2015 following distribution of “SCE Income Qualified Programs Help Customers in Need (press release)” and “A Little Help with Electric Bill Makes Big Difference for L.A. Woman (Inside Edison).” A total of 43 media placements were earned between July 1-Nov. 3 in ethnic media and general media outlets.

African American media outlets: 8

Asian media outlets: 23

Hispanic: 8

General Media: 2

Other Coverage: 2

June 30, 2015 SCE's Income Qualified Programs Help Customers in Need			
African American Market			
Date	Media Outlet	Agency	Language
9-Jul-15	Long Beach Times	BC&C	English
9-Jul-15	San Bernardino American	BC&C	English
9-Jul-15	Voice	BC&C	English
23-Jul-15	Tri-County Sentry	BC&C	English
24-Jul-15	Tri-County Sentry	BC&C	English
6-Aug-15	IECN (Inland Empire Community News	BC&C	English
3-Sep-15	San Bernardino American	BC&C	English
23-Sep-15	Los Angeles Sentinel	SCE	English
Other coverage			
Date	Media Outlet	Agency	Language
3-Nov-15	The Sacramento Bee		English
Asian Market			
Date	Media Outlet	Agency	Language
1-Jul-15	International Daily	SCE	Chinese
4-Jul-15	Balita Online	Nakatomi	Filipino
4-Jul-15	Balita Print	Nakatomi	Filipino
7-Jul-15	Chinese Daily Online	Nakatomi	Chinese
7-Jul-15	Korean Herald online	Nakatomi	Korean
7-Jul-15	Korean Seoul Radio	Nakatomi	Korean
7-Jul-15	Viet Bao Daily Print	Nakatomi	Vietnamese
7-Jul-15	Viet Bao Daily Print	Nakatomi	Vietnamese
7-Jul-15	Zhong Guo Daily Print	Nakatomi	Chinese

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8-Jul-15	Epoch Times	Nakatomi	Chinese
8-Jul-15	Iamkorean.com	Nakatomi	Korean
8-Jul-15	Korean Herald Print	Nakatomi	Korean
8-Jul-15	Korean Herald online	Nakatomi	Korean
8-Jul-15	World Journal Online	Nakatomi	Chinese
8-Jul-15	World Journal Print	Nakatomi	Chinese
9-Jul-15	Korean Daily	Nakatomi	Korean
9-Jul-15	Korean Daily	Nakatomi	Korean
10-Jul-15	Sereecia Newspaper	Nakatomi	Thai
10-Jul-15	Siam	Nakatomi	Thai
10-Jul-15	Siam	Nakatomi	Thai
11-Jul-15	Chinese Biz	Nakatomi	Chinese
11-Jul-15	Chinese Biz	Nakatomi	Chinese
1-Aug-15	Nguoi Viet Daily News	Nakatomi	Vietnamese
11-Oct-15	World Journal	Nakatomi	Chinese
Hispanic Market			
Date	Media Outlet	Agency	Language
23-Jul-15	La Prensa	Communications Lab	Spanish
24-Jul-15	Excelsior	Communications Lab	Spanish
30-Jul-15	El Informador Del Valley	Communications Lab	Spanish
30-Jul-15	Excelsior	Communications Lab	Spanish
12-Aug-15	KVER 4 (Univision)	Communications Lab	Spanish
13-Aug-15	El Informador Del Valley	Communications Lab	Spanish
14-Aug-15	El Informador Del Valley	Communications Lab	Spanish
19-Aug-15	Entravision	Communications Lab	Spanish
General Market			
Date	Media Outlet	Agency	Language
30-Jun-15	Reuters	SCE	English

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30-Jun-15	Business Wire	SCE	English
31-Oct-15	Assemblyman Ian Calderon Newsletter		English
10-Nov-15	Palm Springs Desert Sun		English

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

Using the percentage of approved applications by volume from various outreach methods, SCE's four most effective outreach methods in 2015 were:

1. General enrollment efforts, which generated 38% of enrollments. General outreach efforts include the Capitation Fee Project and enrollments through third-party interactive voice response campaigns.
2. Call Center enrollment efforts, which generated 29% of all enrollments;
3. Collateral materials distributed at community outreach events directed customers to SCE's website for additional program information including how to enroll on-line. Strategic page placement of assistance programs information and direct links on sce.com web-site appeal to customers utilizing the internet. Customer enrolling via internet generated 19% of all enrollments;

Internal and external data sharing efforts, which generated 13% of enrollments

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

Through a variety of outreach, marketing and awareness campaigns, SCE has been persistent in its ongoing efforts to reach and enroll customers. In 2015, significant outreach efforts included, but were not limited to, active recruitment of new CARE Capitation agencies, multilingual outreach, ethnic and general market media, and designing CARE marketing materials and correspondence to reach increasing numbers of ethnic populations and under-penetrated geographic areas. SCE ended the 2015 program year at 85.5% penetration and will continue to vigorously market the program in attempting to achieve the 90% penetration rate goal.

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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.*

SCE continued collaborating with Southern California Gas Company, Southwest Gas, Pacific Gas & Electric Company, and local water utilities as directed in D.11-05-020 to share CARE participant data electronically to assist customers to enroll in each utility's program. In 2015, approximately 27,705 customers were enrolled in SCE's CARE rate through sharing data with the aforementioned utilities.

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

Contractors who perform ESA assessment services assist customers in completing a CARE application, if the customer is qualified. Through this effort 3,977 customers enrolled in CARE during 2015. The CARE program continually integrates its efforts and messaging with the ESA program at all outreach events, communications, and marketing campaigns. SCE also enrolled 1,037 new CARE customers through the Energy Assistance Fund (EAF) program; which provides utility payment assistance through voluntary customer, employee, and shareholder donations.

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

SCE utilizes the Capitation Fee Project as a channel to coordinate with service providers of related low income programs to reach out and provide one-on-one assistance to SCE's hardest-to-reach customer base. In 2015, SCE partnered with food banks, clothing distribution centers, employment workshops, farmers' markets, faith and community based publications, school events and community fairs to coordinate the CARE program with their related services.

Each quarter, Low Income Home Energy Assistance Program (LIHEAP) payment recipients were automatically enrolled in CARE, which generated 1,902 enrollments in 2015.

2.4.7 *Describe the process for cross-referral of low-income customers between the utility and 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*

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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).

A copy of SCE's ongoing agreement with CSD was filed in 2001 with SCE's 2000 CARE Annual Progress Report. SCE includes the following language on its individually-metered customer CARE application for cross-referral of low-income customers to CSD:

“Other Programs and Services You May Qualify For: LIHEAP provides bill payment assistance, emergency bill assistance, and weatherization services. Call the Department of Community Services and Development at 1-800-433-4327 for more information. For other Edison assistance programs, call 1-800-736-4777.”

SCE Call Center Representatives refer income-qualified customers who are in arrears, to their local HEAP agency for payment assistance

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.*

SCE continuously looks at areas of improvement for CARE enrollment and processing. In 2015, SCE implemented system enhancements to improve program processes and support regulatory changes. For example, SCE implemented a dedicated High Usage Verification webpage which provides the customer with answers to Frequently Asked Questions, a basic structure of what the customer must do to remain on CARE, and important information they should know before submitting their documents.

Cost effectiveness of various outreach and enrollment strategies is described in Section 1.4

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2.5 Processing CARE Applications

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

SCE communicates directly with the submetered tenants every two years or four years, based upon their initial CARE enrollment date or last recertification date and whether they are profiled as fixed-income or non-fixed income. Submetered tenants follow similar recertification guidelines as those set for individually metered CARE participants. When tenants are due to recertify, they are provided with a mailed renewal request. If no response is received within 45-days, SCE will mail a second request to the tenants prior to removal.

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.*

The Capitation Fee program, authorized by the CPUC in D.01-05-033, takes advantage of the opportunity to enroll eligible customers in CARE while they are receiving other services from entities that assist low-income clients. This program is centered on providing outreach and enrollment services.

SCE partners with CBOs and private contractors to enroll customers into the CARE Program. In CARE Table 7, SCE lists its CARE Capitation Program contractors, enrollments, and contractor status (e.g., private, CBO, WMDVBE, and LIHEAP contractor).

Under this program, SCE pays a capitation fee to entities for each new customer they help to enroll in SCE's CARE program. The capitation fee is to reimburse entities for the incremental amount associated with assisting customers in completing an SCE CARE application, generally while the customer is receiving other low-income services and/or information from that entity.

Third-party outreach and enrollments for SCE occurred primarily through organizations participating in the Capitation Fee program and ESA contractors. The project was intended to provide valuable outreach services for the CARE program by assisting clients with filling out CARE applications as an adjunct to the organization's other daily activities.

Through internal data sharing, SCE enrolled customers who received an ESA service or LIHEAP payment assistance in the CARE program.

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SCE can make a comparison of outreach cost per enrollment. The following table shows that SCE's cost per enrollment is about 38 percent of the cost per enrollment for the Capitation Fee program.

Comparison of Cost per Enrollment between SCE and Third Parties			
	Enrolled	Outreach Cost	Cost per Enrollment
SCE ^[1]	260,303	\$2,015,226	\$7.74
Capitation Fee Project ^[2]	2,998	\$60,809	\$20.28
^[1] Includes all costs including capitation fees. Does not include enrollments from EMA contractors as they do not have an unbundled fee for a CARE enrollment. Does not include FERA expenses.			
^[2] Does not include FERA expenses.			

In addition, SCE can make a comparison to effectiveness. The following table compares the approval percentages among SCE enrollment activities and the third-party Capitation Fee program/ESA contractors.

Comparison of Enrollment Effectiveness between SCE and Third Parties			
Enrollment Activity	Received	Approved	Percent
SCE			
SCE Call Center Requests	91,881,	81,641	89%
SCE Direct Mail	43,686	34,272	78%
Special Projects/Events	35,862	33,272	93%
Internet Enrolments	51,001	50,639	99%
PG&E Data Exchange	-	-	-
SWG Data Exchange	-	-	-
SoCalGas Data Exchange	28,152	27,692	98%
Water Utilities Data Exchange	15	13	87%
DCSD Automatic Enrollment	-	-	0%
Other Miscellaneous Sources	69,651	32,675	47%
Third Parties			
Capitation Fee Project	3,095	2,998	97%
ESA Contractors	3,981	3,977	100%

SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2016

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.*

In 2015, there were no significant issues/events that impacted program management.

SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2016

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.*

CARE Expansion Program Participating Facilities by Month			
2015	CARE Residential Facilities	CARE Commercial Facilities	Total
January	442	183	625
February	445	174	619
March	391	155	546
April	374	149	523
May	410	164	574
June	409	162	571
July	416	166	582
August	427	166	593
September	425	161	586
October	446	180	626
November	451	180	631
December	444	179	623

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.*

Commercial/ Residential	ESTABLISH IN 2015		RECERT IN 2015		CLOSED in 2015	
	Service Accounts	No. of Beds	Service Accounts	No. of Beds	Service Accounts	No. of Beds
Residential	85	550	88	979	19	90
Commercial	9	730	32	1,969	4	95
TOTAL	94	1,280	120	2,948	23	185

3.2 Usage Information

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

SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2016

CARE Expansion Program Average Monthly Gas / Electric Usage		
Customer	Gas Therms	Electric KWh
Residential Facilities	N/A	959
Commercial Facilities	N/A	12,338

3.3 Program Costs

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

3.3.1.1 *Discount Information*

See CARE Table 1

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

The average annual CARE discount received per residential facility by energy source is \$784.32.

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

The average annual CARE discount received per commercial facility by energy source is \$6,017.82.

3.4 Outreach

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

Potentially eligible customers may become aware of the CARE Expansion program through SCE's customer call centers. Events conducted by SCE's Local Public Affairs group promotes Income Qualified Programs to community leaders across SCE's service territory. Organizations participating in the CARE Capitation Fee program may assist a customer who is eligible to complete a CARE application for the Expansion Program.

SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2016

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.*

Customers who would qualify under the Expansion Program, are primarily group living facilities and homeless shelters, which can be residential or commercial customers. SCE partners with non-profit organizations throughout the territory for CARE enrollment purposes. SCE's call center representatives promote the Expansion Program to potential qualifying facilities whenever possible. The forums conducted by the Local Public Affairs group highlight the CARE Expansion program as well.

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.*

SCE shares SCE CARE participant data with Southern California Gas Company, Southwest Gas, Pacific Gas & Electric Company, and local water utilities.

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 barrier to participation for the Expanded CARE program tends to come from a lack of knowledge regarding the availability of CARE to non-profit community. To help mitigate these issues, SCE's Call Center representatives are trained to prescreen and offer the program when speaking with potentially qualified group living facilities and homeless shelters.

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.*

SCE explored additional modifications to the CARE processing system to support the Expanded CARE program processing. The modifications addressed the ability to capture and modify the number of beds per qualifying facility, allowing that data to be easily extracted for reporting purposes.

SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2016

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.*

In 2015, there were no significant issues/events that impacted program management in this reporting period.

4. Fund Shifting

4.1 Report ESA fund shifting activity that falls within rules laid out in D. 12-08-044.

There were no ESA fund shifting activity that occurred within the rules laid out in D.12-08-044.

4.2 Report CARE fund shifting activity that falls within rules laid out in D. 12-08-044.

SCE was authorized \$588,000 for processing, certification, and recertification and the actual spend was \$588,000. This resulted in a difference of \$224, 583. SCE attributed the over-expenditure to higher than forecasted processing costs.

SCE was authorized \$216,000 for pilots and the actual spend was \$258,582. This resulted in a difference of \$42,582. SCE attributed the over-expenditure to the CHANGES contractor, Self Help for the Elderly, submitting invoices from 2014 which were ultimately paid out in 2015.

SCE was authorized \$264,000 for regulatory compliance and the actual spend was \$392,855. This resulted in a difference of \$128,855. SCE attributed the over-expenditure to higher support costs to respond to increased regulatory activities related to the 2015-2017 application, as the decision on CHANGES, a bridge year extension request, and ongoing activities for implementation of AB 327 (2013). In addition, SCE experienced budget increases for labor resulting from outdated budget assumptions made in 2011 for the 2012-2014 application cycle that do not reflect today's actuals.

4.3 Was there any ESA or CARE fund shifting activity that occurred that falls outside the rules laid out in D. 12-08-044?

No ESA or CARE fund shifting activity that occurred outside the rules laid out in D.12-08-044.

SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2016

5. Appendix: ESA and CARE Program Tables

ESA- Table 1- ESA Overall Program Expenses
ESA- Table 2- ESA Expenses & Energy Savings by Measures Installed
ESA- Table 3- ESA Cost Effectiveness
ESA- Table 4- ESA Program Detail by Housing Type and Source
ESA- Table 5- ESA Direct Purchases & Installation Contractors
ESA- Table 6- ESA Installation Cost of Program Installation Contractors
ESA- Table 7- Expenditures by Cost Elements
ESA- Table 8- Homes Unwilling / Unable to Participate
ESA- Table 9- Life Cycle Bill Savings by Measure
ESA- Table 10- Energy Rate Used for Bill Savings Calculations
ESA- Table 11- Bill Savings Calculations by Program Year
ESA- Table 12- ESA Program Fund Shifting
ESA- Table 13- Categorical Enrollment
ESA- Table 14- Leveraging & Integration
ESA- Table 15- Lighting
ESA- Table 16- “Add Back” Measures

CARE- Table 1- CARE Overall Program Expenses
CARE- Table 2- CARE Enrollment, Recertification, Attrition, and Penetration
CARE- Table 3- CARE Post Enrollment Verification Results
CARE- Table 4- Self Certification and Re-Certification Applications
CARE- Table 5- Enrollment by County
CARE- Table 6- Recertification Results
CARE- Table 7- Capitation Contractors
CARE- Table 8- Participants per Month Fund Shifting
CARE- Table 9- Average Monthly Usage & Bill
CARE- Table 10- CARE Surcharge & Revenue
CARE- Table 11- CARE Capitation Applications
CARE- Table 12- CARE Expansion Program
CARE- Table 13- CARE High Usage Verification Results
CARE- Table 14- CARE Categorical Enrollment
CARE- Table 15- CARE Verification and Initial Enrollment 2012
CARE- Table 16- CARE Verification and Initial Enrollment 2013
CARE- Table 17- CARE Verification and Initial Enrollment 2014
CARE- Table 18- CARE Verification and Initial Enrollment 2015

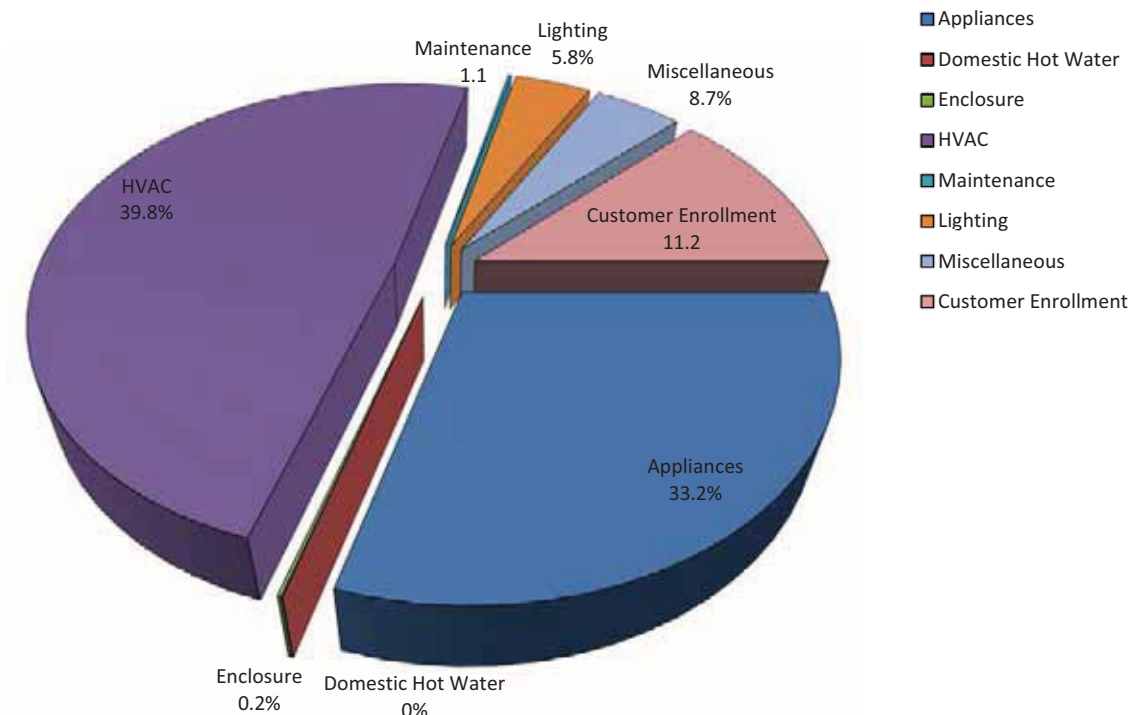
Energy Savings Assistance Program and CARE Program

2015 Summary Highlights

2015 Energy Savings Assistance Program Summary			
2015	Authorized / Planning Assumptions	Actual	%
Budget	\$72,736,630	\$51,331,186	70.52%
Homes Treated	87,389	54,127	61.94%
kWh Saved		28,285,308	
kW Demand Reduced		4,415.65	
Therms Saved		N/A	

2013 CARE Program Summary			
2015	Authorized Budget	Actual	%
Administrative Expenses	\$7,019,650	\$4,771,387	68%
Subsidies	\$416,800,000	\$372,593,533	89%
Service Establishment Charge	-	-	-
Total Program Costs and Discounts	\$423,819,650	\$377,364,921	89%
2015 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	34,621	154,036	78,621
2013 CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
Total Enrolled	1,499,342	1,281,620	85.5%

2015 ESA Program Expenditures by Measure Group



	A	B	C	D	E	F	G
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report ESA Table 3 ESA Program Cost-Effectiveness Southern California Edison						
2		PY - Recorded ^[1]					
3		Ratio of Benefits Over Costs			Net Benefits; \$ Millions		
4	Program Year ^[2]	Utility Cost Test	Total Resource Cost Test ^[3]	Modified Participant Test	Utility Cost Test	Total Resource Cost Test ^[3]	Modified Participant Test
5	2015	0.97	0.70	0.90	\$ (1.42)	\$ (12.89)	\$ (4.31)
6	2014	1.14	0.86	0.87	\$ 6.85	\$ (7.17)	\$ (6.67)
7	2013	0.96	0.83	0.81	\$ (2.27)	\$ (9.24)	\$ (10.08)
8	2012	0.74	0.59	0.71	\$ (9.75)	\$ (15.41)	\$ (10.96)
9	2011	0.69	0.55	0.69	\$ (15.48)	\$ (22.78)	\$ (15.63)
10	2010	0.77	0.59	0.74	\$ (14.85)	\$ (26.54)	\$ (17.07)
11	2009	0.77	0.61	0.76	\$ (9.70)	\$ (16.67)	\$ (10.39)
12	2008	0.72	0.61	0.75	\$ (10.81)	\$ (14.83)	\$ (9.45)
13	2007	0.59	0.52	1.29	\$ (13.25)	\$ (15.59)	\$ 9.29
14	2006	0.81	0.72	1.36	\$ (5.92)	\$ (8.91)	\$ 11.38
15	2005	0.69	0.59	0.99	\$ (6.98)	\$ (9.31)	\$ (0.17)
16	2004	0.82	0.63	1.05	\$ (2.89)	\$ (5.90)	\$ 0.79
17	2003	0.73	0.58	1.04	\$ (5.13)	\$ (7.70)	\$ 0.74
18							
19	E3 - Version SCE2013 V1c4						
20							
21	^[1] - Source of 2015 data				2015		
22	Resource Benefits, E3 Calculator				\$ 30,574,401		
23	Utility NEB, LIPPT Workbook				\$ 11,287,089		
24	Participant NEB, LIPPT Workbook				\$ 2,427,412		
25	Program Cost, E3 Calculator				\$ 51,331,175		
26	NPV Program Cost, E3 Calculator				\$ 43,464,201		
27	NPV Utility Cost, E3 Calculator				\$ 43,277,784		
28	NPV Bill Savings, LIPPT				\$ 36,544,121		
29							
30	^[2] Data from prior years have been entered from prior ESA (LIEE) Annual Reports						
31							
32	^[3] SCE calculated the Total Resource Cost Test results without non-energy benefits. The Commission directed the utilities to measure ESA program cost effectiveness using the Utility Cost Test and the Modified Participant Test with the appropriate non-energy benefits for each in D.01-12-020.						
33	Purchased but un-used inventory is excluded from calculations						
34							

	A	B	C	D	E	F	G
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report ESA Table 4 Detail by Housing Type and Source Southern California Edison						
2			2015 Energy Savings				
3	Customer	Housing Type	# Homes Treated	(MWh)	MW	(mTherm*)	2015 Expenses [1]
4	Gas and Electric Customers						
5	Owners - Total						
6		Single Family					
7		Multi Family					
8		Mobile Homes					
9	Renters - Total						
10		Single Family					
11		Multi Family					
12		Mobile Homes					
13	Electric Customers (only)						
14	Owners - Total						
15		Single Family	24,227	13,236,735	2,392	N/A	\$ 25,579,138
16		Multi Family	418	162,069	21	N/A	\$ 254,717
17		Mobile Homes	4,863	2,064,729	277	N/A	\$ 3,938,689
18	Renters - Total						
19		Single Family	12,927	7,374,352	1,039	N/A	\$ 13,063,248
20		Multi Family	10,703	4,889,635	615	N/A	\$ 7,523,679
21		Mobile Homes	989	557,788	73	N/A	\$ 971,715
22	Gas Customers (only)						
23	Owners - Total						
24		Single Family					
25		Multi Family					
26		Mobile Homes					
27	Renters - Total						
28		Single Family					
29		Multi Family					
30		Mobile Homes					
31							
32	Totals:		54,127	28,285,309	4,416	-	\$ 51,331,186
33							
34							
35	Penetration History						
36	Year	Homes Treated [2]	Ineligible & Unwilling [3]	Estimated Eligible in Current Year [4]	Current Year Penetration Rate for Homes Treated		
37	2002	29,685					
38	2003	33,348					
39	2004	38,996					
40	2005	36,420					
41	2006	53,017					
42	2007	44,323					
43	2008	54,635					
44	2009	61,834	22,109	83,445	74%		
45	2010	121,016	41,110	83,445	145%		
46	2011	93,771	25,067	83,446	112%		
47	2012	49,026	19,833	87,389	56%		
48	2013	69,031	37,449	87,389	79%		
49	2014	76,983	40,596	87,389	88%		
50	2015	54,127	57,193	87,389	62%		
51	2016						
52	2017						
53	2018						
54	2019						
55	2020						
56	Total Homes Treated since 2002	816,212					
57							
58	[1] Excluding indirect program costs.						
59	[2] Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative.						
60	[3] Ineligible & Unwilling homes most typically include homes denied service due to the Modified 3 Measure Minimum Rule. Other situations are when owners refuse to make required copayments, postponements are requested, owners do not grant approval or submit authorization forms, accounts are not active, homes have been served through another program such as LIHEAP, documents are incomplete/missing, or customers are not interested.						
61	[4] Based on Attachment F of D.12-08-044.						
62							
63							
64							
65							
66	Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory			
67	2015	PG&E	5,874	0			
68	2015	SDG&E	0	0			
69	2015	SoCalGas	1,237,607	26,526			

PY 2015 Energy Savings Assistance and CARE Programs Annual Report
ESA Table 5
ESA Program Direct Purchases & Installation Contractors
Southern California Edison

Contractor	County ^[1]	Contractor Type				2015 Annual Expenditures
		Private	CBO	WMDVBE	LIHEAP	
American Electric Supply, Inc. ^[2]	All	x				\$ 673,154
American Insulation, Inc.	14	x		x		\$ 146,598
Assert, Inc.	2		x			\$ 432,082
Autocell Electronics, Inc. ^[2]	All	x		x		\$ 801,907
Community Action Partnership of San Bernardino County	8		x	x	x	\$ 4,408
Community Action of Ventura County	9, 11		x		x	\$ 240,161
Energy Efficiency Resources, Inc. ^[2]	All	x		x		\$ 16,352,157
Energy Save	4, 6	x		x		\$ 1,547,245
Environmental Assessment Services & Education of California	14	x		x		\$ 254,033
FCI Management Consultants	4	x		x		\$ 48,491
Ferguson Enterprises ^[2]	All	x				\$ 1,155,568
Gary's Pool Supplies ^[2]	All	x				\$ 2,019,246
Home Energy Assistance Living, Inc.	4, 6	x		x		\$ 310,214
Inter City Energy Systems, Inc.	14	x		x		\$ 688,233
Inyo Mono Advocates for Community Action	1, 5		x		x	\$ -
John Harrison Contracting, Inc.	7, 8	x		x		\$ 3,799,656
Long Beach Community Services Development Corp.	4		x	x	x	\$ 26,398
Maravilla Foundation	2, 4, 8, 10, 11		x	x	x	\$ 2,503,310
Pacific Asian Consortium in Employment	4		x	x	x	\$ 29,566
Peace Officers for Green Environment	4, 6, 7, 8, 9, 11	x		x		\$ 2,416,614
Proteus, Inc.	2, 3, 4, 8, 10, 11, 12		x			\$ 3,095,972
Quality Conservation Services, Inc.	14	x				\$ 467,291
Reliable Energy Management, Inc.	1, 2, 4, 6, 8	x		x		\$ 1,359,548
Richard Heath and Associates, Inc. ^[3]	All	x		x		\$ 595,318
Saving Energy Consulting Services, Inc.	7, 8	x		x		\$ 429,261
SEARS Commercial ^[2]	All	x				\$ 765,593
Synergy Companies	14	x				\$ 340,315
Tri-State Home Improvements, Inc.	4, 7, 8	x		x		\$ 4,944,061
Veterans in Community Services, Inc.	4		x	x		\$ 215,296
Village Solutions Foundation	4, 6		x			\$ 50,019
Total Direct Purchases & Installations						\$ 45,711,716

^[1] Legend for Counties Served

1 Inyo	6 Orange	11 Ventura
2 Kern	7 Riverside	12 Fresno
3 Kings	8 San Bernardino	13 Service clients from within the organization
4 Los Angeles	9 Santa Barbara	14 Service SCG customers only
5 Mono	10 Tulare	

^[2] Appliance Supplier

^[3] Inspections

	A	B	C	D	E
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report ESA Table 7 Expenditures Recorded by Cost Element Southern California Edison				
2	ESA Program:	Labor ^[1]	Non-Labor ^[2]	Contract ^[3]	Total
3	Energy Efficiency				
4	Appliances			\$ 15,105,853	\$ 15,105,853
5	Domestic Hot Water			\$ 20,022	\$ 20,022
6	Enclosure			\$ 68,574	\$ 68,574
7	HVAC			\$ 18,106,020	\$ 18,106,020
8	Maintenance			\$ 483,223	\$ 483,223
9	Lighting			\$ 2,648,504	\$ 2,648,504
10	Miscellaneous			\$ 3,936,610	\$ 3,936,610
11	Customer Enrollment			\$ 5,103,024	\$ 5,103,024
12	In Home Education			\$ 768,098	\$ 768,098
13	Pilot			\$ -	\$ -
14	Energy Efficiency TOTAL			\$ 46,239,927	\$ 46,239,927
15		\$ -	\$ -		
16	Training Center	\$ 140,124	\$ 15,263	\$ 30,288	\$ 185,675
17	Inspections	\$ 125,795	\$ 7,818	\$ 583,719	\$ 717,331
18	Marketing and Outreach	\$ (8)	\$ 610,512	\$ 309,717	\$ 920,221
19	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
20	Measurement and Evaluation Studies	\$ (12,796)	\$ 34,639	\$ 57,265	\$ 79,108
21	Regulatory Compliance	\$ 570,850	\$ 4,648	\$ -	\$ 575,498
22	General Administration	\$ 1,985,254	\$ 225,985	\$ 369,392	\$ 2,580,630
23	CPUC Energy Division	0	\$ 27,549	\$ 5,247.52	\$ 32,797
24					
25	TOTAL PROGRAM COSTS	\$ 2,809,218	\$ 926,414	\$ 47,595,554	\$ 51,331,186
26					
27	^[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.				
28	^[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.				
29	^[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.				

	A	B	C	D	E	F	G
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report ESAP Table 9 Life Cycle Bill Savings by Measure Southern California Edison						
2			2015 Number Installed	Per Measure Electric Impact - Average (kWh)^[2]	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)^[2]	2015 Total Measure Life Cycle Bill Savings^{[1] [2]}
3	Appliances						
4	High Efficiency Clothes Washer	Each					
5	Refrigerators	Each	15,514	774		14	\$ 17,110,451
6	Microwaves	Each					
7	Domestic Hot Water						
8	Water Heater Blanket	Home	43	87		7	\$ 3,105
9	Low Flow Shower Head	Home	349	105		11	\$ 40,746
10	Water Heater Pipe Insulation	Home	114	85		10	\$ 11,592
11	Faucet Aerator	Home	354	161		10	\$ 63,295
12	Water Heater Repair/Replacement	Each					
13	Thermostatic Shower Valve	Each					
14	Enclosure						
15	Air Sealing / Envelope	Home	744	59		11	\$ 52,118
16	Attic Insulation	Home	6	-			
17	HVAC						
18	FAU Standing Pilot Light Conversion	Each					
19	Furnace Repair/Replacement	Each	1	-			-
20	Room A/C Replacement	Each	895	68		9	\$ 62,015
21	Central A/C Replacement	Each	1,796	162		15	\$ 436,019
22	Heat Pump Replacement	Each	62	678		15	\$ 62,836
23	Evaporative Coolers (Replacement)	Each					
24	Evaporative Coolers (Installation)	Each	10,689	466		15	\$ 7,444,551
25	Duct Testing and Sealing	Home	1,778	21		18	\$ 62,488
26	Maintenance						
27	Furnace Clean and Tune	Home					
28	Central A/C Tune-up	Home	3,698	179		5	\$ 411,456
29	Evaporative Cooler Maintenance	Home					
30	Lighting						
31	Compact Fluorescent Lights (CFLs)	Each	267,684	17		9	\$ 4,552,578
32	Interior Hard wired CFL fixtures	Each					
33	Exterior Hard wired CFL fixtures	Each	2,209	35		16	\$ 120,623
34	Torchiere	Each	9,841	91		16	\$ 1,391,723
35	Occupancy Sensor	Each					
36	LED Night Lights	Each					
37	Miscellaneous						
38	Pool Pumps	Each	2,150	1,743		10	\$ 4,166,097
39	Smart Power Strips	Each	36,476	24		5	\$ 552,428
40	Pilots						
41		Each					
42							
43	Total Homes Served By the Program	54,127					\$ 36,544,121
44	Life Cycle Bill Savings Per Home						\$ 675.16
45							
46	[1] Net Present Values of Lifecycle Bill Savings						

	A	B	C
	PY 2015 Energy Savings Assistance and CARE Programs Annual Report ESA Table 10 Energy Rate Used for Bill Savings Calculations Southern California Edison		
1			
2	Year	\$/kWh [1]	\$/Therm
3	2015	0.1371	N/A
4	2016	0.1412	N/A
5	2017	0.1454	N/A
6	2018	0.1498	N/A
7	2019	0.1543	N/A
8	2020	0.1589	N/A
9	2021	0.1637	N/A
10	2022	0.1686	N/A
11	2023	0.1737	N/A
12	2024	0.1789	N/A
13	2025	0.1843	N/A
14	2026	0.1898	N/A
15	2027	0.1955	N/A
16	2028	0.2013	N/A
17	2029	0.2074	N/A
18	2030	0.2136	N/A
19	2031	0.2200	N/A
20	2032	0.2266	N/A
21	2033	0.2334	N/A
22	2034	0.2404	N/A
23	2035	0.2476	N/A
24	2036	0.2550	N/A
25	2037	0.2627	N/A
26	2037	0.2627	N/A
27	2038	0.2706	N/A
28			

	A	B	C	D	E
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report ESA Table 11 Bill Savings Calculations by Program Year Southern California Edison				
2	Program Year ^[1]	Program Costs ^[1]	Program Lifecycle Bill Savings ^{[2] [3]}	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings ^{[2] [3]}
3	2013	\$ 39,378,995	\$ 24,591,923	0.62	\$ 501.61
4	2014	\$ 55,604,816	\$ 40,191,998	0.72	\$ 582.23
5	2015	\$ 51,331,186	\$ 36,544,121	0.71	\$ 675.16

	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
	PV 2015 Energy Savings Assistance and CARE Programs Annual Report																								
	ESA Table 12																								
	Energy Savings Assistance Program Fund Shifting																								
	Southern California Edison																								
1																									
2																									
3																									
4																									
5																									
6																									
7	ESA Program:																								
8	Energy Efficiency																								
9	Appliance	\$ 21,018,838	\$ -	\$ 21,018,838	\$ 15,105,853	\$ -	\$ 15,105,853																		
10	Domestic Hot Water	\$ 57,405	\$ -	\$ 57,405	\$ 28,022	\$ -	\$ 28,022																		
11	Lighting	\$ 267,540	\$ -	\$ 267,540	\$ 26,572	\$ -	\$ 26,572																		
12	HVAC	\$ 27,306,615	\$ -	\$ 27,306,615	\$ 18,106,020	\$ -	\$ 18,106,020																		
13	Maintenance	\$ 233,333	\$ -	\$ 233,333	\$ 483,223	\$ -	\$ 483,223																		
14	Lighting	\$ 3,272,401	\$ -	\$ 3,272,401	\$ 2,848,504	\$ -	\$ 2,848,504																		
15	Miscellaneous	\$ 4,726,931	\$ -	\$ 4,726,931	\$ 3,936,610	\$ -	\$ 3,936,610																		
16	Customer Enrollment	\$ 5,613,669	\$ -	\$ 5,613,669	\$ 5,103,024	\$ -	\$ 5,103,024																		
17	In Home Educator	\$ 1,245,405	\$ -	\$ 1,245,405	\$ 768,068	\$ -	\$ 768,068																		
18	Energy Efficiency TOTAL	\$ 63,736,137	\$ -	\$ 63,736,137	\$ 46,239,927	\$ -	\$ 46,239,927																		
19																									
20																									
21	Training Center	\$ 325,955	\$ -	\$ 325,955	\$ 185,675	\$ -	\$ 185,675																		
22	Inspections	\$ 1,579,538	\$ -	\$ 1,579,538	\$ 717,331	\$ -	\$ 717,331																		
23	Marketing and Outreach	\$ 1,373,000	\$ -	\$ 1,373,000	\$ 920,221	\$ -	\$ 920,221																		
24	Statewide ME&O ^(a)	\$ 120,000	\$ -	\$ 120,000	\$ -	\$ -	\$ -																		
25	W&E Studies ^(a)	\$ 200,000	\$ -	\$ 200,000	\$ 79,108	\$ -	\$ 79,108																		
26	Regulatory Compliance ^(a)	\$ 606,000	\$ -	\$ 606,000	\$ 575,498	\$ -	\$ 575,498																		
27	General Administration ^(a)	\$ 4,736,000	\$ -	\$ 4,736,000	\$ 2,590,650	\$ -	\$ 2,590,650																		
28	CPUC Energy Division ^(a)	\$ 60,000	\$ -	\$ 60,000	\$ 32,797	\$ -	\$ 32,797																		
29	TOTAL PROGRAM COSTS	\$ 72,736,630	\$ -	\$ 72,736,630	\$ 51,331,186	\$ -	\$ 51,331,186																		
30	Carry Forward from Prior Years	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
31	\$x,xxx,xxx	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
32	Carry Back from Future Years	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
33	TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	\$ 72,736,630	\$ -	\$ 72,736,630	\$ 51,331,186	\$ -	\$ 51,331,186																		
34																									
35																									
36																									
37																									

^(a) Numbers reported in standard accounting format, with negative amounts displayed in parentheses (\$xxx.xx).

^(b) Prior written authorization from the Commission is required before the utilities can shift into or out of these categories.

PY 2015 Energy Savings Assistance and CARE Programs Annual Report

ESA Table 13

Categorical and Other Enrollment

Southern California Edison

Type of Enrollment	Number of customers treated ^[1]
Women, Infants, and Children Program (WIC)	3,537
Supplemental Security Income (SSI)	2,038
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	1,985
CalWORKs/Temporary Assistance for Needy Families (TANF)	323
Tribal TANF	6
Medicaid/Medi-Cal for Families	104
Healthy Families A&B	-
National School Lunch Program (NSLP) - Free Lunch	386
Low-income Home Energy Assistance Program (LIHEAP)	-
Bureau of Indian Affairs General Assistance	-
Head Start Income Eligible - (Tribal Only)	-
Other (specify)	-

^[1] Number of customers treated reflects categorical programs selected by customer. Please note in some case customer select more than one eligible program for a single account.

PY 2015 Energy Savings Assistance and CARE Programs Annual Report ESA Table 14 Leveraging & Integration Southern California Edison												
	A	B	C	D	E	F	G	H	I	J	K	L
1				Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measureable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
2	Coordination Type [1] Leveraging, Program Coordination, Datashtaring	Parthner Grid Alternatives (Single-family Affordable Solar Homes (SASH) program administrator)	Brief Description of Effort G.A. shares with SCE low income leads of homes on which they intend to install solar panels. SCE ensures those homes have been or will be enrolled in ESA.	Y	Y	\$1,160	60,618	N	116	[5]	Y	
3	Leveraging, Datashtaring	Other IOU ESA Programs (SCG, PG&E, SWG, Datashtaring)	IOUs share lists of homes served in joint territories.	Y	Y	\$336,580	17,603,134	N	33,658		Y	
4	Interdepartmental Integration, Program Coordination	Shared Marketing Materials & Resources	Welcome Kit: 335,728 postcards mailed to new and transferring CARE and non-CARE customers. Leads customers to Web page where financial assistance programs (e.g.: ESA) are featured.	N	N	<\$70,503	N/A	N	N/A		N	Generates awareness. Customers are then free to enroll in programs via multiple existing enrollment channels. Unable to track uniquely.
5	Interdepartmental Integration, Program Coordination	Shared Marketing Materials & Resources	287,368 welcome emails to new and transferring CARE and non-CARE customers. Leads customers to Web page where financial assistance programs (e.g.: ESA) are featured.	N	N	<\$60,347	N/A	N	N/A		N	Generates awareness. Customers are then free to enroll in programs via multiple existing enrollment channels. Unable to track uniquely.
6	Interdepartmental Integration, Program Coordination	Shared Marketing Materials & Resources	30,000 Energy Guides with useful conservation tips and relevant solutions for seniors, used by Consumer Affairs at community events. Energy guide includes information on ESA.	N	N	<\$6,300	N/A	N	N/A		N	Generates awareness. Customers are then free to enroll in programs via multiple existing enrollment channels. Unable to track uniquely.
7	Interdepartmental Integration, Program Coordination	Shared Marketing Materials & Resources	Bill Onset: Article on resources to help reduce your bill provided to ~6.2 million customers, and included ESA.	N	N	<\$1,302,000	N/A	N	N/A		N	Generates awareness. Customers are then free to enroll in programs via multiple existing enrollment channels. Unable to track uniquely.
8	Program Coordination	Joint Contractor Across Programs	SCE used existing CMHP (Mobile Home program) contractor to also complete ESA applications and assessments for Mobile Homes.	Y	Y	N/A	<60,096	N	115		N	This combination likely enhanced perceived value of both programs to potential participants when being asked to participate.
9												
10												
11												
12												
	[1] Leveraging, Interdepartmental Integration, Program Coordination, Data Sharing, ME&O, etc. [2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU). In 2014 SCE spent approximately \$10 per Treated lead through marketing and outreach efforts. a) G.A.: 116 homes x \$10 per home = \$1,162. b) 33,658 Treated homes through other IOUs' ESA/low income programs at \$10 per saved lead = \$336,580. In 2014 SCE spent on average \$0.21 for each piece of directed collateral. (Paper and electronic combined. Excludes less-targeted methods: display, print and social media). c) 335,728 Welcome Kits x \$0.21 per piece = \$70,503. d) 287,368 Welcome Emails x \$0.21 = \$60,347. e) 30,000 Energy Guides x \$0.21 = \$6,300. f) 6.2 million Onsets x \$0.21 = \$1,302,000. Amount of Dollars Saved are reported as Less Than (<) for instances in which the marketing effort did not focus on ESA, and therefore likely had less impact on the recipients than an ESA-specific mailer (at \$0.21 each) would have had [3] Energy savings/benefits. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households. Average kWh saved per Treated home in PY2014 is 523 kWh as calculated from ESA Table 2 of this report: 28,285,308 kWh / 54,127 treated homes = 523 kWh/home. 115 ESA Homes by CMHP Contractor x 523 kWh/Home = 60,096 kWh. [4] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.											
13												
14												
15												

[1] Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.

[2] Leveraging and integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).
In 2014 SCE spent approximately \$10 per Treated lead through marketing and outreach efforts. a) G.A.: 116 homes x \$10 per home = \$1,682. b) 33,658 Treated homes through other IOUs' ESA/low income programs at \$10 per saved lead = \$336,580.

In 2014 SCE spent on average \$0.21 for each piece of directed collateral. (Paper and electronic combined. Excludes less-targeted methods: display, print and social media). c) 335,728 Welcome Kits x \$0.21 per piece = \$70,503. d) 287,368 Welcome Emails x \$0.21 = \$60,347. e) 30,000 Energy Guides x \$0.21 = \$6,300. f) 6.2 million Onsets x \$0.21 = \$1,302,000.

Amount of Dollars Saved are reported as Less Than (<) for instances in which the marketing effort did not focus on ESA, and therefore likely had less impact on the recipients than an ESA-specific mailer (at \$0.21 each) would have had

[3] Energy savings/benefits. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.

Average kWh saved per Treated home in PY2014 is 523 kWh as calculated from ESA Table 2 of this report: 28,285,308 kWh / 54,127 treated homes = 523 kWh/home. 115 ESA Homes by CMHP Contractor x 523 kWh/Home = 60,096 kWh.

[4] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

	A	B	C	D	E	F
	PY 2015 Energy Savings Assistance and CARE Programs Annual Report ESA Table 15 Lighting Southern California Edison					
1						
2						
3						
4	Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each					
5	Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	(overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin)	AB 1109 Compliant? ^[1]
6	13 Watt - CFL	13 Watt - CFL	\$ 1.82	\$ 5.00	\$ 6.82	Yes
7	19 Watt - CFL	19 Watt - CFL	\$ 2.21	\$ 5.00	\$ 7.21	Yes
8	23 Watt - CFL	23 Watt - CFL	\$ 2.36	\$ 5.00	\$ 7.36	Yes
9						
10						
11	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 ^[2]	
12	2015	54,127	75,486	3.55	4,449,325	
13						
14						
15	^[1] Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting? 2) Do all models comply with Europe's RoHS standards on toxicity?					
16						
17	^[2] All savings are calculated based on the "PY2011 Energy Savings Assistance Program Impact Evaluation Final Report, August 30, 2013", when data are available, and other sources as described in Attachment A-2 of SCE's Testimony in Support of Application for Approval of Low Income Programs and Budgets for Program Years 2012 - 2014, filed May 16, 2011.					

	A	B	C	D	E	F	G	H
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report ESA Table 16 "Add Back" Measures Southern California Edison							
2			Ratio of Benefits Over Costs [1]				Budget Impact of "Add Back" [2]	Energy Savings Impact (kWh Annual) [3]
3	Measure	Climate Zone	Utility Cost Test	Modified Participant Test	Total Resource Cost Test	Quantity Installed		
4	Central Heat Pump - Multi-Family Zone 15	15	0.35	0.33	0.23	5	\$ 16,681	3,373
5	Central Heat Pump - Single Family Zone 15	15	0.29	0.27	0.19	34	\$ 125,826	19,968
6	Central Air Conditionning - Multi-Family Zone 14	14	-	-	-	56	\$ 200,671	5,433
7	Central Air Conditionning - Single Family Zone 14	14	0.06	0.04	0.05	1,324	\$ 4,888,910	133,300
8	Central Air Conditionning - Single Family Zone 15	15	0.12	0.08	0.09	329	\$ 1,176,395	130,916
9	Room Air Conditioner - Mobile Home Zone 10	10	-	-	-	182	\$ 132,998	7,457
10	Room Air Conditioner - Mobile Home Zone 13	13	-	-	-	42	\$ 32,643	2,472
11	Room Air Conditioner - Multi-Family Zone 10	10	-	-	-	4	\$ 3,028	173
12	Room Air Conditioner - Multi-Family Zone 13	13	-	-	-	1	\$ 777	58
13	Room Air Conditioner - Single Family Zone 10	10	0.17	0.11	0.13	189	\$ 141,693	8,382
14	Room Air Conditioner - Single Family Zone 13	13	0.14	0.09	0.12	269	\$ 209,400	15,866
15	Central AC Maintenance - Mobile Home Zone 14	14	0.22	0.14	0.18	117	\$ 15,338	3,042
16	Central AC Maintenance - Mobile Home Zone 15	15	0.22	0.14	0.18	287	\$ 37,640	7,462
17	Central AC Maintenance - Multi-Family Zone 14	14	0.24	0.15	0.19	22	\$ 2,867	594
18	Central AC Maintenance - Multi-Family Zone 15	15	0.23	0.15	0.18	104	\$ 13,595	2,808
19	Central AC Maintenance - Single Family Zone 14	14	1.36	0.85	1.10	2366	\$ 308,526	482,664
20	Central AC Maintenance - Single Family Zone 15	15	1.35	0.86	1.09	802	\$ 105,246	163,608
21	Envelope & Air Sealing - Mobile Home 6	6	-	-	-	-	\$ -	-
22	Envelope & Air Sealing - Moible Home 8	8	-	-	-	-	\$ -	-
23	Envelope & Air Sealing - Mobile Home 9	9	0.52	0.41	0.39	-	\$ -	-
24	Envelope & Air Sealing - Mobile Home 10	10	1.31	1.02	0.99	10	\$ 557	542.90
25	Envelope & Air Sealing - Mobile Home 13	13	1.84	1.44	1.40	2	\$ 89	196.32
26	Envelope & Air Sealing - Mobile Home 14	14	1.25	0.98	0.95	4	\$ 173	196.40
27	Envelope & Air Sealing - Mobile Home 15	15	0.41	0.32	0.31	3	\$ 352	162.00
28	Envelope & Air Sealing - Mobile Home 16	16	1.09	0.85	0.83	1	\$ 55	34.00
29	Envelope & Air Sealing - Single Family 6	6	0.54	0.42	0.41	102	\$ 9,024	3,876.00
30	Envelope & Air Sealing - Multi Family 8	8	0.50	0.39	0.38	94	\$ 7,929	871.38
31	Envelope & Air Sealing - Multi Family 9	9	0.99	0.77	0.75	147	\$ 11,235	10,951.50
32	Envelope & Air Sealing - Multi Family 10	10	1.42	1.11	1.08	54	\$ 2,907	852.66
33	Envelope & Air Sealing - Multi Family 13	13	1.43	1.12	1.08	7	\$ 299	366.45
34	Envelope & Air Sealing - Multi Family 14	14	2.71	2.12	2.06	68	\$ 914	3,770.60
35	Envelope & Air Sealing - Multi Family 15	15	2.50	1.96	1.90	11	\$ 686	2,388.87
36	Envelope & Air Sealing - Multi Family 16	16	-	-	-	-	\$ -	-
37	Envelope & Air Sealing - Single Family 6	6	0.49	0.38	0.37	35	\$ 5,447	1,330.00
38	Envelope & Air Sealing - Single Family 8	8	0.35	0.28	0.27	25	\$ 3,149	194.00
39	Envelope & Air Sealing - Single Family 9	9	0.60	0.47	0.45	20	\$ 2,817	2,066.20
40	Envelope & Air Sealing - Single Family 10	10	1.38	1.08	1.05	34	\$ 3,032	1,012.18
41	Envelope & Air Sealing - Single Family 13	13	1.07	0.84	0.81	23	\$ 2,720	1,513.86
42	Envelope & Air Sealing - Single Family 14	14	0.93	0.73	0.71	67	\$ 7,095	1,817.04
43	Envelope & Air Sealing - Single Family 15	15	2.22	1.74	1.69	32	\$ 2,437	11,437.76
44	Envelope & Air Sealing - Single Family 16	16	0.58	0.46	0.44	5	\$ 747	5.90
45	[1] Employed cost effectiveness formulas from 2012-2014 program cycle, and kWh/kW savings estimates from the "PY2011 Energy Savings Assistance Program Impact Evaluation Final Report, August 30, 2013", when data are available, and other sources as described in Attachment A-2 of SCE's							
46	Testimony in Support of Application for Approval of Low Income Programs and Budgets for Program Years 2012 - 2014, filed May 16, 2011.							

	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 2015 Energy Savings Assistance and CARE Programs Annual Report																																																																			
	CARE Table 2																																																																			
	Enrollment, Recertification, Attrition, & Penetration																																																																			
	Southern California Edison																																																																			
1																																																																				
2	New Enrollment													Recertification ^[a]							Enrollment																																															
3	Self-Certification (Income or Categorical)													Automatic Enrollment							Attrition																																															
4	Inter-Utility ^[1] , Utility ^[2]													Intra-Utility ^[3]							Leaving ^[3]							Combined (F+G+H)							Total New Enrollment (E+I+J)					Scheduled		Non-Scheduled (Duplicates)		Total Recertification (L+M+N)					No Response		Failed PEV		Failed Recertification		Other (P+Q+R+S)		Total Attrition (P+Q+R+S)		Gross Adjusted (K-T)		Net Adjusted (K-T)		Total CARE Participants		Estimated CARE Eligible		Penetration Rate % (WX)	
5	January	57	1,030	0	1,087	4,848	5,958	7,819	6,571	6,648	16,894	260	19,772	16,801	7,199	0	24,000	12,696	236	599	15,866	23,397	43,772	-9,625	1,301,585	1,495,342	86.8%																																									
6	February	629	292	0	921	4,050	6,273	6,571	6,648	16,894	258	18,073	17,645	17,645	17,857	0	29,502	8,450	141	630	14,086	23,307	47,575	-5,203	1,296,351	1,495,342	86.5%																																									
7	March	3,477	538	0	4,015	4,096	6,171	6,648	16,894	254	17,164	17,651	17,651	17,858	0	30,359	9,397	156	684	14,250	24,387	49,890	-5,340	1,287,808	1,495,342	86.9%																																										
8	April	4,469	137	0	4,506	3,164	7,988	5,530	6,648	16,852	317	21,605	14,605	13,680	0	28,285	19,491	72	523	16,859	28,945	49,890	-5,340	1,287,808	1,495,342	86.9%																																										
9	May	3,844	132	0	3,976	3,199	6,491	5,107	14,797	291	19,004	19,136	14,753	0	33,869	10,627	99	762	9,507	20,995	52,953	-1,931	1,285,677	1,495,342	86.8%																																											
10	June	3,421	229	0	3,650	4,104	9,721	6,019	19,944	216	23,710	20,087	17,202	0	37,269	8,559	64	696	14,314	23,653	60,999	3,527	1,285,934	1,495,342	86.8%																																											
11	July	2,326	38	0	2,174	4,104	13,919	5,973	24,462	440	27,198	20,439	17,393	0	31,852	12,314	62	993	10,510	23,609	50,968	3,527	1,289,461	1,495,342	86.0%																																											
12	August	1,890	248	0	2,138	5,811	3,204	2,789	19,944	216	23,710	19,944	15,159	0	35,612	9,269	129	676	12,965	22,729	64,494	6,409	1,289,952	1,495,342	86.4%																																											
13	September	1,914	341	0	2,255	4,021	5,087	2,722	16,180	297	20,869	19,732	18,366	0	29,188	13,345	270	633	18,709	32,957	47,890	-14,295	1,280,727	1,499,342	85.4%																																											
14	October	1,752	2,924	0	4,676	3,725	7,203	5,968	16,896	206	21,778	16,558	12,293	0	28,851	8,776	223	583	3,955	18,037	50,629	-3,741	1,284,468	1,499,342	92.9%																																											
15	November	2,169	249	0	2,518	4,222	9,748	6,059	20,029	277	23,224	13,944	12,610	0	26,554	8,768	213	504	16,587	28,072	49,778	-2,848	1,281,620	1,499,342	85.5%																																											
16	December	27,705	8,916	-	34,621	50,539	100,837	78,183	229,659	2,998	267,278	218,316	155,778	-	374,094	121,482	1,706	7,793	165,887	296,868	641,372	-29,590	1,281,620	1,499,342	85.5%																																											
17	YTD Total	27,705	8,916	-	34,621	50,539	100,837	78,183	229,659	2,998	267,278	218,316	155,778	-	374,094	121,482	1,706	7,793	165,887	296,868	641,372	-29,590	1,281,620	1,499,342	85.5%																																											
18																																																																				
19	^[a] Enrollments via data sharing between the IOUs.																																																																			
20	^[2] Enrollments via data sharing with departments and/or programs within the utility. Includes HEAP payment data file from Accounts Payable Dept.																																																																			
21	^[3] Enrollments via data sharing with programs outside the IOU that serve low-income customers.																																																																			
22	^[4] Not including Recertification.																																																																			
23	^[5] Recertification results are tied to the month initiated. Therefore, recertification results may be pending due to the time permitted for a participant to respond.																																																																			

	A	B	C	D	E	F	G
	PY 2015 Energy Savings Assistance and CARE Programs Annual Report CARE Table 4						
	CARE Self-Certification and Self-Recertification Applications Southern California Edison						
1							
2		Provided ^[2]	Received	Approved	Denied ^[4]	Pending/Never Completed ^[5]	Duplicates
3	Total ^[1]	1,140,707	941,852	561,363	77,313	139,772	303,176
4	Percentage ^[3]	N/A	100.00%	59.60%	8.21%	14.84%	32.19%
5							
6	^[1] Includes sub-metered customers.						
7	^[2] Includes number of applications SCE provided for all direct mailing campaigns, customer calls made to the call center, and other outreach methods. Because there are other means by which customers obtain applications which are not counted, this						
8	^[3] Percent of received applications.						
9	^[4] Includes all applications received and not approved.						
10	^[5] Includes pending recertification responses.						

	A	B	C	D	E	F	G	H
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report CARE Table 7 CARE Capitation Contractors Southern California Edison							
2	Contractor Name ^[1]	Contractor Type (Check one or more if applicable)				Enrollments ^[3]		
3		Private	CBO	WMDVBE ^[2]	LIHEAP	Rural	Urban	Total
4	ALPHA ENTERPRISES	x				0	1	1
5	ANTELOPE VLY BOYS & GIRLS CLUB		x			0	0	0
6	APAC SERVICE CENTER		x			0	63	63
7	ASIAN AMERICAN DRUG ABUSE PROG		x			0	16	16
8	ASIAN AMERICAN RESOURCE CENTER		x			0	3	3
9	ASIAN YOUTH CENTER		x			0	0	0
10	BEST BUY CO., INC. (111)	x				0	0	0
11	BEST PARTNERS	x				9	655	664
12	BETHEL BAPTIST CHURCH		x			0	0	0
13	BISHOP PAIUTE TRIBE		x			0	0	0
14	BOYS&GIRLS CLUB OF SAN GABRIEL		x			0	0	0
15	CAP OF SAN BERNARDINO CTY		x		x	0	0	0
16	CAREGIVERS VOLUNTEERS ELDERLY		x			0	0	0
17	CATHOLIC CHARITIES OF LA INC		x			0	0	0
18	CHINESE CHRISTIAN HERALD CRUS.		x			0	8	8
19	CHINO NEIGHBORHOOD HOUSE		x			0	1	1
20	CHRIST UNITY CENTER		x			0	0	0
21	CITIHOUSING REAL ESTATE SERVICES		x			0	0	0
22	CITRUS VALLEY HEALTH PARTNERS		x			0	0	0
23	CITY OF BEAUMONT SENIOR CENTER	x				0	0	0
24	COMM ACTION PARTNERSHIP OF OC		x		x	0	0	0
25	COMM CENTER AT TIERRA DEL SOL		x			0	0	0
26	COMMUNITY PANTRY		x			0	0	0
27	COR COMM. DEVELOPMENT CORP.		x			0	0	0
28	CORONA NORCO FAMILY YMCA		x			0	4	4
29	COUNCIL ON AGING-ORANGE COUNTY		x			0	0	0
30	DESERT ARC		x			0	2	2
31	DESERT MANNA MINISTRIES INC		x			0	1	1
32	DISABLED RESOURCES CTR, INC		x			0	18	18
33	EL CONCILIO DEL CONDADO DE		x			0	2	2
34	FAIR HOUSING COUNCIL RIVERSIDE		x			0	0	0
35	FAMILY SERVICE ASSOCIATION	x				0	0	0
36	FAMILY SVC ASSOC OF REDLANDS		x			0	1	1
37	FOOD SHARE		x			0	4	4
38	GO THE CALENDAR STOP		x			1	2,154	2,155
39	HEART OF COMPASSION		x			0	0	0
40	HELP OF OJAI, INC.		x			0	1	1
41	HIGH DESERT TRANS. LIVNG. CONN.		x			0	0	0
42	HOLLON MARKETING SYSTEM		x			0	0	0
43	HOUSING AUTH.-SAN BUENAVENTURA		x			0	0	0
44	HOUSING AUTHORITY OF KINGS CO		x			3	0	3
45	KERNVILLE UNION SCHOOL DISTRIC	x				0	0	0
46	KINGS COMMUNITY ACTION ORG		x			5	0	5
47	KINGS CTY COMMISSION ON AGING		x			0	0	0
48	KOREAN COMMUNITY SERVICES		x			0	0	0
49	LA COUNTY HOUSING AUTHORITY	x				0	0	0
50	LIGHTHOUSE LEARNING RES CTR	x				0	0	0
51	LITTLE TOKYO SERVICE CENTER (AKA: LTSC COMM DEVEL. CORP)		x			0	0	0
52	LTSC COMM. DEVEL. CORP		x			0	9	9
53	LUTHERAN SOCIAL SVC OF SO CAL		x			0	0	0
54	LUTHERAN SOCIAL SVCS OF SO CA		x			0	0	0
55	MENTAL HEALTH ASSOCIATION		x			0	0	0
56	MEXICAN AMERICAN OPPORTUNITY		x			0	0	0
57	MTN COMM FAM RESOURCE CNTR		x			0	1	1
58	NEW GREATER CIR. MISSION, INC	x				0	0	0
59	NEW HOPE VILLAGE, INC		x			0	1	1
60	NEW HORIZONS CAREGIVERS GROUP		x			0	1	1
61	OCCC	x				0	6	6
62	ONEOC		x			0	0	0
63	OPERATION GRACE		x			0	3	3
64	OUR COMMUNITY WORKS		x			0	11	11
65	OXNARD/HUENEME SALVATION ARMY		x			0	0	0
66	PACIFIC ISLANDER HLTH (PIHP)		x			0	1	1

	A	B	C	D	E	F	G	H
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report CARE Table 7 CARE Capitation Contractors Southern California Edison							
2	Contractor Name ^[1]	Contractor Type (Check one or more if applicable)				Enrollments ^[3]		
3		Private	CBO	WMDVBE ^[2]	LIHEAP	Rural	Urban	Total
67	PACIFIC PRIDE FOUNDATION		x			0	1	1
68	PAVING THE WAY FOUNDATION		x			0	0	0
69	REACH OUT 29		x			0	0	0
70	RIVERSIDE DEPT COMM ACTION		x		x	2	1	3
71	SALVATION ARMY SANTA FE SPGS		x			0	8	8
72	SANTA ANITA FAMILY SERVICE		x			0	0	0
73	SENIOR ADVOCATES OF THE DESERT		x			0	0	0
74	SHARE OUR SELVES		x			0	0	0
75	SMILES FOR SENIORS FOUND.		x			0	0	0
76	SOCIETY OF ST VINCENT DE PAUL		x			0	0	0
77	SOUTHEAST CITIES SERVICE CTR.		x			0	1	1
78	SOUTHEAST COMMUNITY DEVELOPMEN		x			0	0	0
79	SPECIAL SVC FOR GROUPS		x			0	0	0
80	ST JOSEPH CATHOLIC CHURCH		x			0	0	0
81	THE CAMBODIAN FAMILY		x			0	0	0
82	UNITED CAMBODIAN COMMUNITY INC		x			0	0	0
83	VICTOR VALLEY COMM SVC COUNCIL		x			0	0	0
84	VIETNAMESE COMMUNITY OF OC INC		x			0	0	0
85	VOLUTNEERS OF EAST LOS ANGELES		x			0	0	0
86	Total Enrollments and Expenditures					20	2,978	2,998
87	^[1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.							
88	^[2] WMDVBE status based on verbal confrimation from agency. No status (blanks) applied for agencies that were unable to be reached.							
89	^[3] Numbers reflect customers that have been placed on the rate YTD. Capitation payments may lag by a month or more depending on when SCE is invoiced by the contractors.							

	A	B	C	D	E	F	G	H
	PY 2015 Energy Savings Assistance and CARE Programs Annual Report CARE Table 8 CARE Participants per Month Southern California Edison							
1								
2	2015	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration Rate	% Change
3	January	-	-	1,301,585	1,301,585	1,499,342	86.8%	-
4	February	-	-	1,296,351	1,296,351	1,499,342	86.5%	-0.3%
5	March	-	-	1,293,148	1,293,148	1,499,342	86.2%	-0.2%
6	April	-	-	1,287,808	1,287,808	1,499,342	85.9%	-0.4%
7	May	-	-	1,285,877	1,285,877	1,499,342	85.8%	-0.1%
8	June	-	-	1,285,934	1,285,934	1,499,342	85.8%	0.0%
9	July	-	-	1,289,461	1,289,461	1,499,342	86.0%	0.2%
10	August	-	-	1,288,472	1,288,472	1,499,342	85.9%	-0.1%
11	September	-	-	1,294,962	1,294,962	1,499,342	86.4%	0.4%
12	October	-	-	1,280,727	1,280,727	1,499,342	85.4%	-0.9%
13	November	-	-	1,284,468	1,284,468	1,499,342	85.7%	0.2%
14	December	-	-	1,281,620	1,281,620	1,499,342	85.5%	-0.2%
15								
16								

	A	B	C	D
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report CARE Table 9 CARE Average Monthly Usage & Bill Southern California Edison			
2	Average Monthly Gas / Electric Usage ^[1]			
3	Residential Non-CARE vs. CARE Customers ^[3]			
4				
5	Customer	Gas Therms	Gas Therms	Total
6		Tier 1	Tier 2	
7	Non-CARE	75	3	78
8	CARE	12	1	13
9				
10	Customer	Electric KWh	Electric KWh	Total
11		Tier 1	Tier 2	
12	Non-CARE	301	280	581
13	CARE	326	188	513
14				
15				
16	Average Monthly Gas / Electric Bill			
17	Residential Non-CARE vs. CARE Customers ^[1] ^[3]			
18	(Dollars per Customer)			
19	Customer	Gas	Electric	
20	Non-CARE	\$54.29	\$108.38	
21	CARE ^[2]	\$43.54	\$58.52	
22				
23	^[1] Excludes master-meter usage.			
24	^[2] After CARE Discount.			
25	^[3] Does not include submetered customers.			

	A	B	C	D	E	F
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report CARE Table 10 CARE Surcharge & Revenue Southern California Edison					
2						
3	Electric					
4	CARE Surcharge and Revenue Collected by Customer Class					
5	Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
6		CARE Surcharge	Monthly Bill			
7						
8	Residential ^[1]	\$9,499,584	\$418,955,409	2.27%	\$113,995,003	27.88%
9	Agricultural	\$819,011	\$21,659,207	3.78%	\$9,828,138	2.40%
10	Commercial	\$18,524,564	\$488,202,712	3.79%	\$222,294,766	54.38%
11	Industrial	\$3,352,147	\$60,557,420	5.54%	\$40,225,760	9.84%
12	Public Authority	\$1,837,300	\$46,639,613	3.94%	\$22,047,602	5.39%
13	Railroads	\$34,695	\$1,030,078	3.37%	\$416,343	0.10%
14	Interdepartmental ^[2]	\$0	\$12,485	0.00%	\$0	0.00%
15	^[1] Excludes CARE customers ^[2] Electricity supplied for Edison-owned water & gas operations on Santa Catalina Island					
16						
17						
18						
19	Gas					
20	CARE Surcharge and Revenue Collected by Customer Class					
21	Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
22		CARE Surcharge	Monthly Bill			
23						
24	Residential	\$777.97	\$59,010.93	1.32%	\$9,335.65	34.66%
25	Commercial	\$1,466.48	\$125,038.77	1.17%	\$17,597.79	65.34%
26	NG Vehicle	\$0.00	\$0.00	0.00%	\$0.00	0.00%
27	Industrial	\$0.00	\$0.00	0.00%	\$0.00	0.00%

	A	B	C	D	E	F
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report CARE Table 11 CARE Capitation Applications Southern California Edison					
2	Entity ^[1]	Total Received	Approved	Denied	Pending/ Never Completed	Duplicate
3	ALPHA ENTERPRISES	2	1	0	0	1
4	APAC SERVICE CENTER	64	63	0	0	1
5	ASIAN AMERICAN DRUG ABUSE PROG	22	16	2	0	4
6	ASIAN AMERICAN RESOURCE CENTER	4	3	0	0	1
7	BEST PARTNERS	666	664	2	0	0
8	CHINESE CHRISTIAN HERALD CRUS.	11	8	1	0	2
9	CHINO NEIGHBORHOOD HOUSE	1	1	0	0	0
10	CORONA NORCO FAMILY YMCA	4	4	0	0	0
11	DESERT ARC	2	2	0	0	0
12	DESERT MANNA MINISTRIES INC	1	1	0	0	0
13	DISABLED RESOURCES CTR, INC	18	18	0	0	0
14	EL CONCILIO DEL CONDADO DE	2	2	0	0	0
15	FAMILY SVC ASSOC OF REDLANDS	5	1	2	0	2
16	FOOD SHARE	6	4	0	0	2
17	GO THE CALENDAR STOP	2,188	2,155	3	0	30
18	HELP OF OJAI, INC.	1	1	0	0	0
19	HOUSING AUTHORITY OF KINGS CO	4	3	1	0	0
20	KERNVILLE UNION SCHOOL DISTRIC	1	0	1	0	0
21	KINGS COMMUNITY ACTION ORG	5	5	0	0	0
22	LTSC COMM. DEVEL. CORP	9	9	0	0	0
23	MTN COMM FAM RESOURCE CNTR	2	1	0	0	1
24	NEW HOPE VILLAGE, INC	2	1	0	0	1
25	OCCC	11	6	3	0	2
26	ONEOC	2	0	1	0	1
27	OPERATION GRACE	6	3	0	0	3
28	OUR COMMUNITY WORKS	11	11	0	0	0
29	PACIFIC ISLANDER HLTH (PIHP)	1	1	0	0	0
30	PACIFIC PRIDE FOUNDATION	2	1	0	0	1
31	RIVERSIDE DEPT COMM ACTION	26	3	2	0	21
32	SALVATION ARMY SANTA FE SPGS	12	8	3	0	1
33	SOUTHEAST CITIES SERVICE CTR.	1	1	0	0	0
34	COMMUNITY PANTRY	1	0	0	0	1
35	MEXICAN AMERICAN OPPORTUNITY	1	0	0	0	1
36	NEW HORIZONS CAREGIVERS GROUP	1	1	0	0	0
37	Grand Total	3,095	2,998	21	-	76
38	^[1] Includes all entities with activity in 2015					

	A	B	C	D	E	F	G
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report CARE Table 12 CARE Expansion Program Southern California Edison						
2	Participating Facilities by Month						
3	2014	Gas			Electric		
4		CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
5	January	-	-	-	442	183	625
6	February	-	-	-	445	174	619
7	March	-	-	-	391	155	546
8	April	-	-	-	374	149	523
9	May	-	-	-	410	164	574
10	June	-	-	-	409	162	571
11	July	-	-	-	416	166	582
12	August	-	-	-	427	166	593
13	September	-	-	-	425	161	586
14	October	-	-	-	446	180	626
15	November	-	-	-	451	180	631
16	December	-	-	-	444	179	623
17							
18							
19	Average Monthly Gas / Electric Usage ^[1]						
20	Customer	Gas	Electric				
21		Therms	KWh				
22	Residential Facilities	N/A	959				
23	Commercial Facilities	N/A	12,338				
24							
25							
26	CARE Expansion Self-Certification and Self-Recertification Applications						
27		Received	Approved	Denied	Pending/Never Completed	Duplicates	
28	Total	395	349	46	-	-	
29	Percentage	-	88.4%	11.6%	-	-	
30							
31							
32	^[1] Excludes master meter usage.						

	A	B	C	D	E	F	G	H	I	J
	PY 2015 Energy Savings Assistance and CARE Programs Annual Report									
	CARE Table 13									
	CARE High Usage Verification Results									
	Southern California Edison									
1										
2	Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring		
	Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) ^[1]	Income Verified and Referred to ESA ^[5]	Failed and Removed ^[2]	Ineligible ^[3]	Completed	Removed ^[4]	Appeals Denied	Appeals Approved
3										
4	48,035	42,613	1,224	4,317	1631	250	2436	48	55	81
5										
6										
7	^[1] Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA.									
8	^[2] Includes customers who declined to participate in ESA, failed to respond to appointment requests, or missed multiple appointments.									
9	^[3] Includes customers who previously participated, did not meet the three-measure minimum, landlord refused, etc.									
10	^[4] Customers removed for exceeding 600% of baseline.									
11	^[5] Some High Usage accounts referred to ESA Program were Income Verified in previous year.									
12										

^[1] Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA.

^[2] Includes customers who declined to participate in ESA, failed to respond to appointment requests, or missed multiple appointments.

^[3] Includes customers who previously participated, did not meet the three-measure minimum, landlord refused, etc.

^[4] Customers removed for exceeding 600% of baseline.

^[5] Some High Usage accounts referred to ESA Program were Income Verified in previous year.

	A	B
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report CARE Table 14 Categorical Enrollment Southern California Edison	
2	Type of Enrollment	Number of customers Enrolled ^[1]
3	Bureau of Indian Affairs General Assistance	226
4	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	56,391
5	CalWORKs/Temporary Assistance for Needy Families (TANF)	-
6	Head Start Income Eligible - (Tribal Only)	846
7	Healthy Families A&B	18,430
8	Low-income Home Energy Assistance Program (LIHEAP)	3,212
9	Medicaid/Medi-Cal	116,060
10	National School Lunch Program (NSLP) - Free Lunch	34,588
11	Supplemental Security Income (SSI)	21,067
12	Tribal TANF	10,472
13	VRU - State Programs	231
14	Women, Infants, and Children Program (WIC)	36,981
15		
16	^[1] Number of customers enrolled reflects categorical programs selected by customer. Please note in some case customer select more than one eligible program for a single account.	

	A	B	C	D	E
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report CARE Table 15 Verification and Initial Enrollment 2013 Southern California Edison				
2					
3	2014 Successful Verifications - Initial Enrollment				
4	Enrollment Channel	Eligibility			
5		Categorical	Income	Unknown ^[1]	Total
6	Initial Enrollment Channel Unavailable	464		2,710	3,174
7	Call Center - Internet Enrollment	1,216	762		1,978
8	Call Center - Application Mailed to Customer	1,385	619	2	2,006
9	Customer Internet Enrollment	1,301	1,080		2,381
10	Direct Mail (mail application annually to non-CARE customers)	466	339	1	806
11	External Data Share (Energy & Water IOUs)	106	14	766	886
12	General Outreach (e.g., community events)	783	549	6	1,338
13	Internal Data Share (e.g., ESA, Energy Assistance Fund [EAF])	5	5	19	29
14	Recertification	6,998	3,752	14	10,764
15	Verification	92	40	10	142
16	Total	12,816	7,160	3,528	23,504
17					
18	2014 De-enrolled and Ineligible Verifications - Initial Enrollment				
19	Enrollment Channel	Eligibility			
20		Categorical	Income	Unknown ^[1]	Total
21	Initial Enrollment Channel Unavailable	493		5,297	5,790
22	Call Center - Internet Enrollment	4,464	3,671		8,135
23	Call Center - Application Mailed to Customer	2,961	1,565	1	4,527
24	Customer Internet Enrollment	3,228	3,355		6,583
25	Direct Mail (mail application annually to non-CARE customers)	904	749	3	1,656
26	External Data Share (Energy & Water IOUs)	269	33	3,099	3,401
27	General Outreach (e.g., community events)	1,659	1,461	7	3,127
28	Internal Data Share (e.g., ESA, Energy Assistance Fund [EAF])	24	12	49	85
29	Recertification	7,950	6,280	12	14,242
30	Verification	85	37	2	124
31	Total	22,037	17,163	8,470	47,670
32					
33	^[1] Eligibility basis often is unknown when enrollment occurs through data sharing				

	A	B	C	D	E
1	PY 2015 Energy Savings Assistance and CARE Programs Annual Report CARE Table 16 Verification and Initial Enrollment 2014 Southern California Edison				
2					
3	2015 Successful Verifications - Initial Enrollment				
4	Enrollment Channel	Eligibility			
5		Categorical	Income	Unknown ^[1]	Total
6	Initial Enrollment Channel Unavailable	312		1,617	1,929
7	Call Center - Internet Enrollment	1,614	687	0	2,301
8	Call Center - Application Mailed to Customer	1,180	944	0	2,124
9	Customer Internet Enrollment	341	261	1	603
10	Direct Mail (mail application annually to non-CARE customers)	116	15	823	954
11	External Data Share (Energy & Water IOUs)	700	632	9	1,341
12	General Outreach (e.g., community events)	17	4	11	32
13	Internal Data Share (e.g., ESA, Energy Assistance Fund [EAF])	5,420	2,520	8	7,948
14	Recertification	371	237	28	636
15	Verification	1,014	665		1,679
16	Total	11,085	5,965	2,497	19,547
17					
18	2015 De-enrolled and Ineligible Verifications - Initial Enrollment				
19	Enrollment Channel	Eligibility			
20		Categorical	Income	Unknown ^[1]	Total
21	Initial Enrollment Channel Unavailable	682		6,933	7,615
22	Call Center - Internet Enrollment	5,337	2,237	3	7,577
23	Call Center - Application Mailed to Customer	5,347	4,376	0	9,723
24	Customer Internet Enrollment	1,191	668	1	1,860
25	Direct Mail (mail application annually to non-CARE customers)	568	40	4,356	4,964
26	External Data Share (Energy & Water IOUs)	3,199	2,456	25	5,680
27	General Outreach (e.g., community events)	185	40	78	303
28	Internal Data Share (e.g., ESA, Energy Assistance Fund [EAF])	14,935	8,953	14	23,902
29	Recertification	3,297	1,875	22	5,194
30	Verification	6,016	4,297		10,313
31	Total	40,757	24,942	11,432	77,131
32					
33	^[1] Eligibility basis often is unknown when enrollment occurs through data sharing				

PY 2015 Energy Savings Assistance and CARE Programs Annual Report
CARE Table 17
Verification and Initial Enrollment 2015
Southern California Edison

2015 Successful Verifications - Initial Enrollment				
Enrollment Channel	Eligibility			
	Categorical	Income	Unknown ^[1]	Total
Initial Enrollment Channel Unavailable	93	0	846	939
Call Center - Internet Enrollment	576	370		946
Call Center - Application Mailed to Customer	963	322	8	1,293
Customer Internet Enrollment	803	462		1,265
Direct Mail (mail application annually to non-CARE customers)	318	194	18	530
External Data Share (Energy & Water IOUs)	82	11	487	580
General Outreach (e.g., community events)	572	444	10	1,026
Internal Data Share (e.g., ESA, Energy Assistance Fund [EAF])	6	8	7	21
Recertification	3,855	1,426	5	5,286
Verification	620	254	141	1,015
Total	7,888	3,491	1,522	12,901

2015 De-enrolled and Ineligible Verifications - Initial Enrollment				
Enrollment Channel	Eligibility			
	Categorical	Income	Unknown ^[1]	Total
Initial Enrollment Channel Unavailable	482	0	7,405	7,887
Call Center - Internet Enrollment	6,148	3,512		9,660
Call Center - Application Mailed to Customer	5,262	1,894	19	7,175
Customer Internet Enrollment	5,869	3,658		9,527
Direct Mail (mail application annually to non-CARE customers)	1,808	793	31	2,632
External Data Share (Energy & Water IOUs)	707	51	3,873	4,631
General Outreach (e.g., community events)	3,935	2,613	47	6,595
Internal Data Share (e.g., ESA, Energy Assistance Fund [EAF])	193	151	85	429
Recertification	17,826	8,784	30	26,640
Verification	2,733	1,171	254	4,158
Total	44,963	22,627	11,744	79,334

^[1] Eligibility basis often is unknown when enrollment occurs through data sharing



**SOUTHERN CALIFORNIA EDISON COMPANY'S (U-338 E)
REPORT FOR THE FAMILY ELECTRIC RATE ASSISTANCE (FERA) PROGRAM FOR
THE PERIOD JANUARY - DECEMBER 2015**

May 1, 2016

**SOUTHERN CALIFORNIA EDISON COMPANY'S REPORT FOR THE
FAMILY ELECTRIC RATE ASSISTANCE (FERA) PROGRAM**

January 1, 2015 through December 31, 2015

I. Participant Information

A. Provide the total number of FERA customers by month, for the reporting period.

See Table 1.

Table 1		
2015	FERA Enrolled	FERA Receiving Tier 3 Benefit¹
January	22,207	14,260
February	21,976	10,659
March	21,810	11,866
April	21,501	11,540
May	21,291	10,767
June	21,202	11,721
July	20,932	13,717
August	20,842	14,087
September	20,614	14,933
October	20,422	N/A
November	20,109	N/A
December	19,838	N/A

¹Effective October 1, 2015 the FERA rate was revised to a flat 12% discount.

- B. Provide the total number of FERA-eligible households, FERA-participating households, and FERA household penetration rates by quarter.**

See Table 2.

Table 2			
FERA Penetration Rate			
2014 Quarter Ending	FERA-Eligible Households	FERA- Participating Households	FERA Household Penetration Rate¹
March 31	211,625	21,810	10.3%
June 30	211,625	21,202	10.0%
September 30	211,625	20,614	9.7%
December 31	211,625	19,838	9.4%

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

SCE used the joint energy utility methodology for the CARE program that was adopted by the California Public Utilities Commission (Commission) in Decision D.01-03-028 for developing FERA penetration estimates for 2015.

Sources for this estimate include current year small area vendor distribution on household characteristics; census Public Use Microdata Sample (PUMS); American Community Survey ("ACS/PUMS"); U.S. Census and Integrated Public Use MicroData Series ("IPUMS-CPS") from the Minnesota Population Center; University of Minnesota; Labor Market Information Data ("EDD/LMID") from the California Employment Development Department; and additional data sources, including estimated small area unemployment data from Synergos Technologies, Inc.

¹ FERA Household Penetration Rate is calculated by dividing FERA Participating Households by FERA-Eligible Households.

As described in the CARE Annual Report, the data was used to provide household size and income distributions as a basis for the eligibility estimates used in 2015. This CARE methodology estimates a demographic eligibility rate by county (and various smaller geographies) for customers based on an income limitation of 200% of the federal poverty guideline. The demographic eligibility rate is applied to (multiplied by) the total number of technically eligible customers (those having an eligible meter or sub-meter) to determine the total number of eligible households. The total number of participating households is divided by the number of eligible households to estimate the CARE penetration rate. The CARE methodology can be extended to cover other programs with guidelines involving household size and income, and the Joint Utilities have done this in the case of FERA income and household size guidelines.

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

As of December 31, 2015, there were 95 sub-metered tenants participating in FERA.

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

SCE did not encounter any problems administering the sub-metered FERA program during 2015.

II. Program Costs

A. Discount Cost

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

The average monthly FERA discount received, in dollars per FERA customer was \$10.23.²

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

The cumulative annual discount for all FERA customers was \$2,545,498.66.³

² Includes all enrolled customers who received a discount in any month.

³ Includes all enrolled customers who received a discount in any month.

B. Administrative Cost

1. Show the FERA Program's administrative cost by category.

See Table 4.

Table 4	
FERA Program Administrative Costs by Category and Benefits	
Category	Cost
Outreach/Marketing	\$ 45,922
Processing, Certification, Recertification ^[1]	\$ -
Post Enrollment Verification ^[1]	\$ -
General Administration ^[1]	\$ -
Information Technology	\$ 207,722
Capitation	\$ 828
TOTAL PROGRAM COSTS	\$ 254,472
CUSTOMER BENEFITS	\$ 2,545,499
TOTAL PROGRAM COSTS & CUSTOMER BENEFITS	\$ 2,799,971

[1] Costs are not tracked separately from CARE; therefore, costs in these categories have been charged to the CARE program.

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

See table below.

Category	Description
Outreach	Includes: Bill inserts, advertising, applications (printing and mailing), posters, brochures, flyers, postage, other outreach, staff labor, costs related to out bound dialing, 800#, and Capitation Fee Project.
Processing, Certification, Recertification	Includes: Staff labor, information technology, application processing, training, programming labor, and sub-meter certification.
Post Enrollment Verification	Includes: Staff labor, information technology, verification processing, training, programming labor, and sub-meter verification.
General Administration	Includes: Information Technology/Programming Programming and labor costs associated with system enhancements, compliance, and maintenance of existing processes. Regulatory Compliance Applications, testimony, advice filings, comments and reply comments, hearings, reports and studies, working group meetings, public input meetings, and tariff revisions. Other Office supplies, market research, program management labor (including pensions and benefits), and technical support and software licensing.
Startup	Includes: Labor and system programming to implement the program.
Benefits	Includes: Rate discounts/subsidy.

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

The costs of distinct CARE and FERA activities are charged separately to each program. Costs that are not tracked separately are charged to the CARE program.

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

SCE's FERA Balancing Account was closed prior to December 31, 2009. In A.08-05-026, SCE proposed to include the FERA-related O&M Administrative funding in the authorized CARE administrative revenue requirement; record actual FERA-related expenses in the CARE Balancing Account (CBA); transfer the December 31, 2008 Family Electric Rate Assistance Balancing Account (FERABA) balance to the Public Purpose Programs Adjustment Mechanism (PPPAM) balancing account; and eliminate Preliminary Statement, Part Z, FERABA. The Commission approved SCE's proposal in D.08-11-031.

As authorized in D.08-11-031, SCE subsequently filed Advice 2300-E, which was approved by the Commission on March 17, 2009 with an effective date of January 1, 2009. In January 2010, SCE transferred the December 31, 2008 FERABA balance of \$79,257 to the PPPAM and eliminated the FERABA.

III. Outreach

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

SCE's goal is to enroll as many eligible customers that are willing to participate in FERA. FERA enrollment decreased from 22,557 on December 31, 2014, to 19,838 on December 31, 2015, which represents a net decrease of 2,719 households.

FERA outreach was conducted as an adjunct to CARE outreach from January through December 2015 as follows:

The CARE and FERA programs' outreach efforts and communications to SCE's in-language and under-penetrated areas continued to be a priority. SCE's CARE/FERA programs partner with internal SCE departments such as Public Affairs, Consumer Affairs, Customer Experience Management, Corporate Communications, Community Involvement,

Speakers Bureau, employee volunteer-based Resource Groups, as well as external organizations and various chambers, foundations, faith-based organizations (FBOs) and community-based organizations (CBOs) in outreach activities that target SCE's hard-to-reach customer base.

Since January 2010, SCE's Customer Communications Organization extended the ability for all phone center representatives to enroll eligible customers in the CARE/FERA Programs via the on-line web enrollment application or send out paper applications if requested.

Throughout 2015, SCE hosted four "Helping our Customers Succeed" Community Forums targeting the Latino, African American, Native American, and Pacific Islander populations. These Forums provide a wealth of information on programs and services, including CARE/FERA and Energy Savings Assistance Program, available to customers, businesses, and non-profit organizations. This strategy builds program awareness at a grassroots and community level where many income-qualified households may connect.

Date	Location
March 6, 2015	Irwindale
May 21, 2015	Santa Clarita
August 14, 2015	Fullerton
September 16, 2015	Culver City

In 2015, SCE participated in nearly 140 community events targeting customers seeking information on bill payment and assistance through rate assistance and energy savings. At events including, but not limited to, Martin Luther King and Black History Month celebrations, senior and faith-based community events, Earth Day festivals, Winter festivals, and the Los Angeles County Fair, more than 31,000 customers received information on CARE/FERA and Energy Savings Assistance Programs as ways to help lower their energy usage and ultimately their electric bill.

CHANGES

On November 19, 2010, the Commission approved Resolution CSID-004, a one-year pilot program named Community Help and Awareness with Natural Gas and Electricity Services (CHANGES), which has been subsequently extended through 2017, to provide limited English speaking customers in-language education, needs and dispute resolution, and

outreach for energy issues. The program is administered through the same community contractor, Self Help for the Elderly (SHE) and 22 CBOs, which also administer the CPUC's Telecommunications Education and Assistance in Multiple-Languages (TEAM) program.

Of the 22 organizations in the program, five are in SCE's service territory. The five organizations serving SCE's territory include: Asian American Educational & Cultural Center, Inc., Delhi Center, El Concilio del Condado de Ventura, Vietnamese Community of Orange County, Inc., and YMCA of Greater Long Beach. The Resolution directs the pilot to be funded by SCE, PG&E, SDG&E and SoCalGas, through CARE outreach program funding.

During most of the 2015 program year, CHANGES was operating as a pilot program. On December 15, 2015, the CPUC authorized CHANGES as an ongoing program in Decision 15-12-047.

The CHANGES program includes three in-language components: education, dispute and need resolution, and outreach.

1. Education: The education component includes trainings, workshops, or one-to-one technical assistance for customers on various topics. Some of the topics covered include: avoiding disconnections, payment arrangements, available assistance programs, how to read a utility bill, tiered rates, and energy conservation.
2. Dispute and Need Resolution: CBOs work directly with customers and utilities to assist with issues such as billing inquiries, payment arrangements, avoidance of service disconnections, and restoration of service. The current CHANGES program provides assistance in 21 languages.
3. Outreach: CBOs leverage the existing TEAM outreach activities as an opportunity to introduce information about CHANGES, provide new energy-related materials, and market the program via various media outlets.

Based on the program administrator's monthly reports, CHANGES completed the following activities for SCE (January-December 2015):

Component (in language)	Activity
Community Events:	
Chinese English	CBOs did outreach and distributed materials at several local events

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Ilokano Japanese Korean Spanish Tagalog Vietnamese	
Media:	
<u>Television</u> <u>Dari</u>	Zarin TV
<u>Radio</u> Chinese	Heavenly Rainbow AM1430
Vietnamese	Bolsa Radio
<u>Print</u> ⁴ Spanish – reached over 145,000 Chinese – reached over 55,000 Korean – reached over 1,265,000 English – reached over 10,000 Tagalog – reached over 2,050,000 Japanese – reached over 15,000 Vietnamese – reached over 30,000	Asian Journal Chinese Christian Herald Crusades El Clasificado Japanese Daily Sun Korea Daily Korea Times LA Midweek Asian Journal RafuShimpo Tribune U.S.A. The U.S. Asian Report Viet American Weekly Vietnamese Magazine Weekend Balita
Consumer Education: By Topic	
Armenian Cantonese English Ilokano Indonesian Japanese Korean Mandarin Spanish Tagalog Vietnamese	CBOs provided small workshops (workshop topics include: Understanding Your Bill, Safety Tips, Level Pay Plan, Energy Conservation, CARE/FERA and Other Assistance Programs, Avoiding Disconnection, and High Energy Use) and one-to-one education with 8,945 SCE SCG customers.

⁴ This information was retrieved from the monthly data report that the CHANGES program administrator, Self Help for the Elderly (SHE), submits to SCE.

SCE conducted marketing to increase awareness and enrollment of the CARE/FERA programs as described below:

Marketing

In order to continue to offer relevant solutions to income-qualified customers, SCE deployed the following integrated efforts:

- Income qualified programs and other assistance programs (CARE, FERA, ESA, Level Pay Plan and Medical Baseline) were featured in customers' monthly electric bill 'onserts' – pre-printed newsletter-type communications – with articles providing resources to help reduce their electricity bills.
- Throughout 2015, SCE continued to reach out to potentially eligible customers in an effort to enroll them in CARE or FERA as appropriate. Targeted direct to consumer mailings, leveraging advanced analytics based on previous responses to enhance SCE's targeting process, were sent to households on a quarterly basis.
- In Q4 2015, SCE tested a targeted mailer to customers indicating a preference to Chinese or Vietnamese language communications.
- As part of the CARE/FERA annual solicitation process in June 2015, SCE included CARE/FERA enrollment applications in the bills of nearly 3 million customers receiving a paper bill (not receiving bills on-line).
- SCE's Customer Communications Organization within SCE's Call Centers continues to utilize the on-line CARE/FERA enrollment application at www.sce.com to directly enroll customers into the CARE or FERA program over the phone or offer the option to send a CARE/FERA application to the customer as appropriate.
- CARE/FERA enrollment is coordinated with other low-income programs such as ESA, LIHEAP, SoCalGas income-qualified programs, as well as certain water utilities. Each month, ESA participants are automatically enrolled in CARE or FERA and LIHEAP participants are automatically enrolled in CARE or FERA quarterly as appropriate. The CARE/FERA Program continuously integrates its efforts and messaging with the ESA program at all outreach events, communications, and marketing campaigns.

- The CARE/FERA Capitation Fee Program team is continuing its efforts to re-engage existing Capitation agencies while strategically registering additional contractors to overcome enrollment barriers, including language, culture, and special needs, as a means of enrolling the hardest-to-reach customers.

Social Media

Social media continues to be a tactic that SCE uses to target appropriate customers who utilize Facebook, Twitter, or other forms of social media. In 2015, outreach efforts included:

- Social media for Income Qualified Programs via Facebook and Twitter to increase awareness and participation in CARE/FERA and ESA.
- Ads on Facebook and Twitter in Q4 in both English and Spanish, targeting users who were also on the CARE/FERA customer email list to leverage frequency.
- In total, there were:
 - Nearly 700,000 impressions
 - Approximately 6,400 website clicks
 - 80 Page “Likes”
 - 970 Post “Likes”
 - 50 “Comments”
 - 125 “Shares” and “Retweets”

Paid Media (Advertising)

The CARE/ /FERA/ESA Programs advertising campaign consisted of desktop display, mobile display, Search Engine Marketing (“SEM” - are ads which appear on the result pages of search engines such as Google based on customers’ pervious searches) and Asian print. SEM launched at the end of September and desktop display launched at the end of October. The campaign delivered 41,425,810 impressions overall in 2015

- The SEM targeted all customers throughout the SCE service territory. SEM delivered 201,871 impressions, 3,782 clicks and a 1.87% click-through rate (CTR).
- Desktop display and mobile placements were targeted to General Market, Asian, and Hispanic segments. Asian and Hispanic digital media launched mid-November. The desktop display and mobile

display campaigns delivered a total of 36.9 million impressions and 27,567 clicks.

- Asian Print was included in order to extend reach into low-income Asian communities and reach those with limited access to digital media. 4.2 million impressions were delivered through 70 total insertions in over 10 publications.

General Market

The General Market advertising campaign ran mid-October through mid-December 2015 and included targeted digital media. General Market media delivered a total of 12,393,934 impressions.

On-line

Desktop display and mobile advertising were placed through Maxpoint, a top performing ad-network used on past SCE campaigns. CARE, the ESA Program, and Joint creatives ran on both Desktop and Mobile placements. Desktop placements delivered 2,212,508 impressions and a Click-Through-Rate ("CTR" – is the percentage of customers who click on the ad) of 0.12%. Mobile placements delivered 10,181,426 impressions and a CTR of 0.09%. 10,107 visits to the site can be attributed to the on-line advertising campaign.

A brief summary of total audience reach is as follows:

Total On-line Impressions 12,393,934

Asian

Advertising campaign targeting Asian households ran November through mid-December and included targeted digital and print media. Asian media delivered a total of 16,497,687 impressions.

- **On-line**

On-line advertising included mobile placements on Maxpoint. Digital placements were delivered in-language to Cambodian, Chinese, Filipino, Korean, and Vietnamese audiences promoting both CARE and ESA Programs. The digital campaign delivered 12,238,031 impressions and a CTR of 0.08%. 8,473 visits to the site can be attributed to the on-line advertising campaign.

- **Print**

A mix of Chinese, Korean, Vietnamese, and Filipino publications was used. Asian publications included *World Journal*, *Sing Tao*, *Korea Times*, *Korea Daily*, *Nguoi Viet*, *Viet Bao*, *Balita*, *Asian Journal* and *California Journal*.

- Total Insertions: 70
- Total Impressions: 4,259,656

A brief summary of total audience reach is as follows:

Total Print Impressions	4,259,656
Total On-line Impressions	12,238,031
Total Impressions	16,497,687

Hispanic

An ad campaign in Spanish ran November through mid-December 2015 and included targeted digital display and mobile media placements. Hispanic media delivered a total of 12,332,318 impressions.

- **On-line**

Desktop display and mobile banners ran on Maxpoint. Desktop display delivered 2,212,471 impressions and a CTR of 0.05%. Mobile placements delivered 10,119,847 impressions and a CTR of 0.04%. 4,852 visits to the site can be attributed to the on-line advertising campaign.

A brief summary of total audience reach is as follows:

Total On-line Impressions 12,332,318

Earned Media (PR and Outreach)

Earned Media (PR and Outreach) coverage of CARE/FERA Programs (including the ESA Program and Medical Baseline Program) was generated in 2015 following distribution of “SCE Income Qualified Programs Help Customers in Need (press release)” and “A Little Help with Electric Bill Makes Big Difference for L.A. Woman (Inside Edison).” A total of 43 media placements were earned between July 1-Nov. 3 in ethnic media and general media outlets.

African American media outlets: 8
Asian media outlets: 23
Hispanic: 8
General Media: 2

Other Coverage: 2

June 30, 2015 SCE's Income Qualified Programs Help Customers in Need			
African American Market			
Date	Media Outlet	Agency	Language
9-Jul-15	Long Beach Times	BC&C	English
9-Jul-15	San Bernardino American	BC&C	English
9-Jul-15	Voice	BC&C	English
23-Jul-15	Tri-County Sentry	BC&C	English
24-Jul-15	Tri-County Sentry	BC&C	English
6-Aug-15	IECN (Inland Empire Community News	BC&C	English
3-Sep-15	San Bernardino American	BC&C	English
23-Sep-15	Los Angeles Sentinel	SCE	English
Other coverage			
Date	Media Outlet	Agency	Language
3-Nov-15	The Sacramento Bee		English
Asian Market			
Date	Media Outlet	Agency	Language
1-Jul-15	International Daily	SCE	Chinese
4-Jul-15	Balita Online	Nakatomi	Filipino
4-Jul-15	Balita Print	Nakatomi	Filipino
7-Jul-15	Chinese Daily Online	Nakatomi	Chinese
7-Jul-15	Korean Herald online	Nakatomi	Korean
7-Jul-15	Korean Seoul Radio	Nakatomi	Korean
7-Jul-15	Viet Bao Daily Print	Nakatomi	Vietnamese
7-Jul-15	Viet Bao Daily Print	Nakatomi	Vietnamese
7-Jul-15	Zhong Guo Daily Print	Nakatomi	Chinese
8-Jul-15	Epoch Times	Nakatomi	Chinese
8-Jul-15	Iamkorean.com	Nakatomi	Korean
8-Jul-15	Korean Herald Print	Nakatomi	Korean
8-Jul-15	Korean Herald online	Nakatomi	Korean
8-Jul-15	World Journal Online	Nakatomi	Chinese
8-Jul-15	World Journal Print	Nakatomi	Chinese
9-Jul-15	Korean Daily	Nakatomi	Korean
9-Jul-15	Korean Daily	Nakatomi	Korean
10-Jul-15	Sereecia Newspaper	Nakatomi	Thai
10-Jul-15	Siam	Nakatomi	Thai
10-Jul-15	Siam	Nakatomi	Thai

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11-Jul-15	Chinese Biz	Nakatomi	Chinese
11-Jul-15	Chinese Biz	Nakatomi	Chinese
1-Aug-15	Nguoi Viet Daily News	Nakatomi	Vietnamese
11-Oct-15	World Journal	Nakatomi	Chinese
Hispanic Market			
Date	Media Outlet	Agency	Language
23-Jul-15	La Prensa	Communications Lab	Spanish
24-Jul-15	Excelsior	Communications Lab	Spanish
30-Jul-15	El Informador Del Valley	Communications Lab	Spanish
30-Jul-15	Excelsior	Communications Lab	Spanish
12-Aug-15	KVER 4 (Univision)	Communications Lab	Spanish
13-Aug-15	El Informador Del Valley	Communications Lab	Spanish
14-Aug-15	El Informador Del Valley	Communications Lab	Spanish
19-Aug-15	Entravision	Communications Lab	Spanish
General Market			
Date	Media Outlet	Agency	Language
30-Jun-15	Reuters	SCE	English
30-Jun-15	Business Wire	SCE	English
31-Oct-15	Assemblyman Ian Calderon Newsletter		English
10-Nov-15	Palm Springs Desert Sun		English

B. Discuss each of the following:

- How FERA customer data and other relevant program information is shared within the utility, for example, between its LIEE and other appropriate low-income programs.**

Both CARE and FERA are promoted through a joint application. All outreach efforts for FERA are combined with the CARE program. Additionally, customer data received from the LIEE program regarding potentially eligible customers is shared with the CARE program.

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

FERA program marketing efforts are leveraged with CARE efforts in order to minimize the cost to the programs. FERA is a program that targets middle income households with high energy usage. SCE believes FERA penetration is unlikely to match CARE due to the smaller level of benefits that are paid to participants.

As a result, benefits of the FERA program do not provide enough incentive for customers to remain on the program. Prior to the revision in the discount structure in October 2015, approximately half of the customers enrolled in FERA actually received a discount in any given month. Marketing a program that presumable may or may not have a benefit is more complicated to sell and less appealing to customers.

IV. Processing FERA Applications

A. Processing Self-Certification and Self-Recertification Applications (individual and sub-metered customers)

1. Provide the number of utility and third-party FERA self-certification and self-recertification applications provided, received, approved, denied, pending/never completed, or duplicates for the reporting period.

See Table 5.

TABLE 5						
FERA Self-Certification and Self-Recertification Applications ⁵						
	Provided ⁶	Received	Approved	Denied ⁷	Pending/Never Completed ⁸	Duplicates
Utility		35,579	6,260	25,635	3,518	166
Capitation		92	8	84	-	-

⁵ Includes sub-metered tenants.

⁶ Self-Certification applications are distributed/mailed through a wide variety of fulfillment and outreach methods so it is not possible to determine an actual amount. Recertification applications are tracked.

⁷ Denied Self-Certification applications are counted to the CARE program due to the dual CARE/FERA application.

⁸ Includes cancelled recertification requests and closed accounts.

Other Third-Party		92	8	84	-	3
Total		35,739	6,314	25,738	3,518	169

B. Processing Random Post-Enrollment Verification Requests

- 1. Provide the total number of verifications requested, received, approved, denied, pending/never completed, or duplicates, for the reporting period.**

See Table 6.

TABLE 6 ⁹						
FERA Random Post-Enrollment Verification Requests ¹⁰						
	Requested	Received	Approved	Denied	Pending/Never Completed ¹¹	Duplicates
Total	716	592	27	80	485	0

V. Program Management

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

There were no issues or events that significantly affected FERA program management in PY2015.

⁹ SCE is reviewing its verification system to determine if it is functioning properly based on the small number of verification requests shown in Table 6.

¹⁰ Verification process for FERA is the same as CARE.

¹¹ Includes customers dropped due to non-response, cancelled requests, and closed accounts.