

**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) 2018 SUPPLEMENTAL
ANNUAL REPORT FOR 2017 LOW INCOME PROGRAMS**

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Dated: **May 14, 2018**

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**SOUTHERN CALIFORNIA EDISON COMPANY'S (U338-E) SUPPLEMENTAL 2018
ANNUAL REPORT FOR 2017 LOW INCOME PROGRAMS**

Southern California Edison Company (SCE) hereby submits its Supplemental Annual Progress Report for the Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE) Programs, and its Supplemental Annual Progress Report for the Family Electric Rate Assistance (FERA) Program (Supplemental Annual Report) for the period January through December 2017. The information in this report supersedes all prior reports submitted by SCE.

SCE's Supplemental Annual Report contains an updated Table 12 of the CARE Annual Report titled "CARE Expansion Program" with verified figures that was not included in SCE Annual Report for 2017 Low Income Programs, filed on May 1, 2018.

Respectfully submitted,

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Dated: May 14, 2018

Attachment 1

SCE's ESA and CARE Programs Supplemental Annual Report for Program 2017



**ANNUAL REPORT ACTIVITY
ON LOW INCOME ASSISTANCE PROGRAMS**

**Southern California Edison Company's
2018 Energy Savings Assistance (ESA)
and
California Alternate Rates for Energy (CARE)
Programs Annual Report**

2017 RESULTS

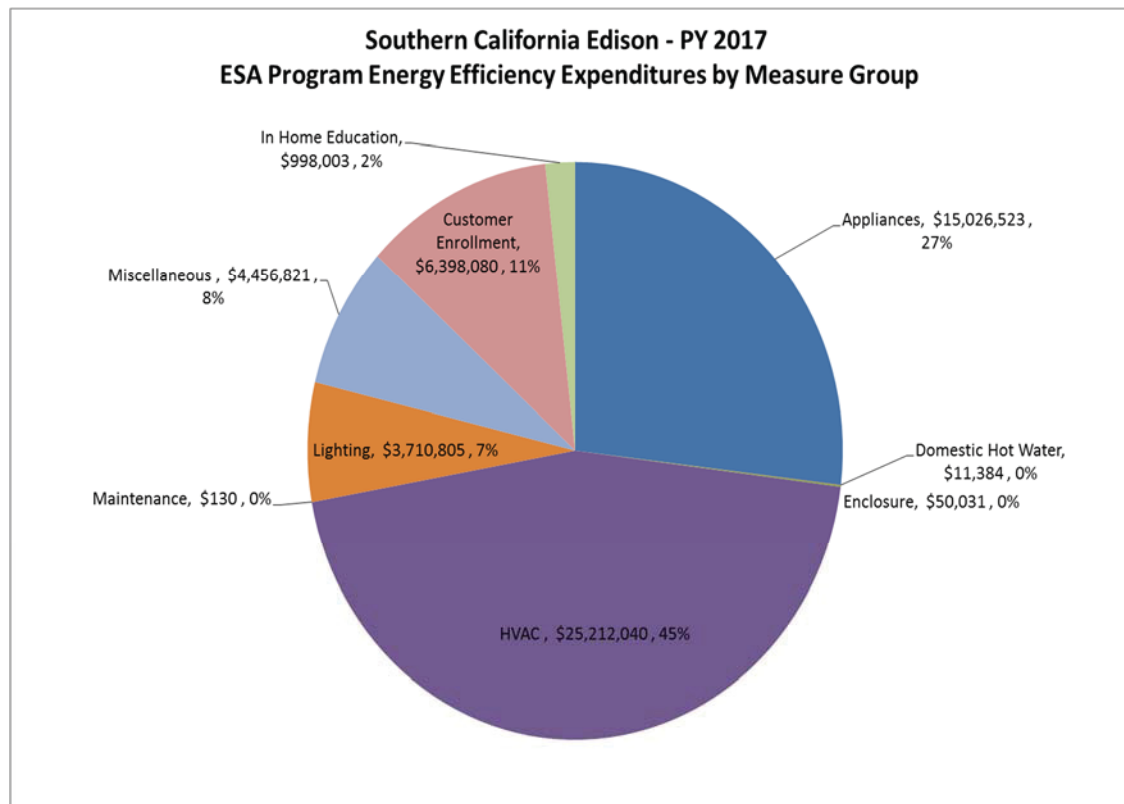
May 1, 2018

The tables below provide a summary of Program Year (PY) 2017 Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE) Program expenditures and activities.

2017 Energy Savings Assistance Program Summary

2017	Authorized / Planning Assumptions	Actual	%
Budget	\$59,601,019	\$61,045,978	102%
Homes Treated	54,509	80,333	147%
kWh Saved	30,800,000	31,824,439	103%
kW Demand Reduced		4,852	
Therms Saved		N/A	

2017 ESA Program Expenditures by Measure Group



2017 CARE Program Summary

2017	Authorized Budget	Actual	%
Administrative Expenses	\$9,981,652	\$6,706,298	67%
Subsidies	\$457,873,645	\$375,043,839	82%
Service Establishment Charge			
Total Program Costs and Discounts	\$467,855,297	\$381,750,137	82%
CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc.	Self-Certified as Categorically Eligible	Self-Certified as Income Eligible
Method	37,554	171,160	82,794
CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
Total Enrolled	1,457,757	1,222,526	83.9%

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1. Energy Savings Assistance (ESA) Program Executive Summary

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 to them. Through the ESA Program, SCE offers a number of energy-efficient appliances to income-qualified customers, including energy-efficient refrigerators, air conditioners, and 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 Commission (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 2017. In 2017 the ESA Program treated 80,333 income qualified customers, of which 64,520 were deemed "first touches homes treated," expending 102% of its authorized budget. In addition, the ESA Program saved 31.8 GWh. These savings were achieved by providing a mix of measures and services, including energy education, energy efficient appliances, and home weatherization. SCE's 2017 ESA Program operated in accordance with direction provided by CPUC Decision D.16-11-022, which adopted budgets and program directives for the Investor-Owned Utilities (IOUs) for the administration and participation in the California Alternate Rates for Energy (CARE) Program and the Energy Savings Assistance (ESA) Program from 2017 through December 31, 2020. "SCE continued making progress toward offering all eligible customers the opportunity to participate in the ESA Program, while awaiting a final Decision¹ resolving the two Petitions for Modifications filed."

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 Decision 17-12-009 issued December 14, 2017 resolving March 14, 2017 Petition for Modification of D.16-11-022

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1.1.1 *Please identify the IOU strategies employed in meeting Goal 1: Improve Customer Outreach.*

Implementation Plan and Timeline		
Strategies	Term 2017-2020	IOU strategy employed this program year
1: Strengthen program outreach using segmentation analysis and social marketing tools.	<ul style="list-style-type: none"> Continue to assess and evaluate customer behavior and energy savings; improve upon outreach to eligible communities 	<ul style="list-style-type: none"> In PY2017, SCE continued to identify neighborhoods with a dense low income population and low ESA Program penetration to conduct marketing and outreach tactics while partnering and integrating with other Income Qualified Programs, and carrying out joint enrollment with IOU counterparts. Continue to work with network of contractors (e.g. CBOs, FBOs, and private organizations) within the low income communities in SCE's service territory.
1.2: Develop a recognizable and trustworthy Brand/Tagline for the programs.	<ul style="list-style-type: none"> Evaluate progress/refine strategy. 	<ul style="list-style-type: none"> All ESA Program marketing and advertising campaigns (collateral, giveaways, direct mail, email, etc.) include the ESA Program brand. In addition, this includes joint IOU printed material, one of which includes the Energy Education guide. SCE leveraged a site established by SoCalGas that allows network of contractor to procure clothing and other materials (e.g. clipboards) with the ESA Program brand.

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Implementation Plan and Timeline		
Strategies	Term 2017-2020	IOU strategy employed this program year
1.3: Improve program delivery.	<ul style="list-style-type: none"> • Ongoing: Use information from segmentation analysis to achieve efficiencies in program delivery. • Ongoing: 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"> • In PY2017, several enhancements were made to SCE.com that provides customers with immediate feedback regarding ESA Program participation. • Continue utilizing and enhancing the Joint Utility Data Sharing Tool (DST), which was a tool developed jointly by SCE and SoCalGas to share their respective ESA program participation data • Launched the Joint Utility Mobile Enrollment (ESA Mobile) with SoCalGas to eliminate duplicate work and further streamline the delivery of program services to eligible customer households. • A Non-Disclosure Agreement (NDA) was established between SCE and Community Services Division (CSD) to share homes treated information and energy usage data.

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Implementation Plan and Timeline		
Strategies	Term 2017-2020	IOU strategy employed this program year
1.4: Promote the growth of a trained ESA workforce.	<ul style="list-style-type: none"> • Implement ESA Program workforce education and training • Coordinate ESA Program workforce and service providers with broader market 	<ul style="list-style-type: none"> • Three types of training were offered in 2017: Service Provider Led Enrollment and Assessment (E&A) training, Back-Office training with various webinars, and CBT software training. This training was offered to workers from existing service providers to improve workforce skills and increase program efficiency. • SCE enhanced the existing workforce training content for the E&A training course and also migrated an SCE Led training to a Service Provider Led training schema, which allowed Service Providers greater flexibility in addressing their respective training needs based on the individual staffing requirements. • SCE continued its' process engaging directly with ESA Service Providers to foster "town hall" discussions about their current and future training needs

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

Implementation Plan and Timeline		
Strategies	Term 2017–2020	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"> Coordinated between the CARE and ESA Programs to identify CARE customers with high energy usage for the purpose of enrolling the household in ESA Continued use of the Joint Utility DST to share respective ESA participation data. Continue to collaborate with Southwest Gas and share homes treated information regarding ESA.
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. 	<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 Plan Program. Increased integration efforts between the ESA and MFEER programs and utilized Single Point of Contact (SPOC) to streamline the customer enrollment process. Coordinated with the Single Family Affordable Homes (SASH) Program 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.

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Implementation Plan and Timeline		
Strategies	Term 2017–2020	IOU strategy employed this program year
2.3: Provide low-income customers with measures that result in the most savings in the ESA program.	<ul style="list-style-type: none"> Continue to evaluate. Assess opportunities to incorporate new energy efficiency measures into the ESA program; for example, 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, LEDs, 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: Identifying segmented concentrations of customers to improve delivery	<ul style="list-style-type: none"> Continue to evaluate. Evaluate approach and determine whether additional segments are needed. 	<ul style="list-style-type: none"> Refined the EMAPS 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: <ul style="list-style-type: none"> ZIPs with high estimated ESA Program income eligibility CARE participants Non-ESA Program participants High energy users (CARE High Usage)

1.2 Energy Assistance Savings Program Overview

Provide a summary of the ESA Program elements as approved in D.14-08-030, D.16-11-022, and D.17-12-009:

Table 1.2.1. Program Summary²

	Authorized Budget / Planning Assumptions	Actual	%
Budget	\$59,601,019	\$61,045,978	102%
Homes Treated	54,509	80,333	147%
kWh Saved	30,800,000	31,824,439	103%
kW Demand Reduced		4,852	

² This is the same ESA Program Summary table shown on Page ii, above.

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 2017, SCE continued to utilize the EMAPS database to track program participation and to identify neighborhoods with a dense low-income population and low ESA Program penetration. EMAPS tracks the marketing and outreach tactics used in various neighborhoods to evaluate effectiveness and provide guidance to our contractors and community- and/or faith-based organizations (CBOs / FBOs). Marketing efforts are staggered to address specific neighborhoods (small geographic areas or "ZIP-9s") within SCE's service territory where city partnerships may have been established.

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

The ESA Program aggregates leads in targeted 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 continues to partner with CBOs, FBOs, and private service providers to assess homes and deliver ESA Program services in local communities.

ESA Table 5 provides a lists of 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/ or FBOs delivering ESA Program services are small, independently-owned companies.

In 2017, SCE continued utilizing a liaison to promote the ESA and CARE Program to Native American tribes and began ongoing discussions with the Tule River tribe. SCE looks forward to continue working with Tule River in 2018 and other Indian tribes within the service territory to address specific needs that could potentially be met by the ESA and CARE Programs.

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.*

In 2017, 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.

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 general, components of the ESA Program — enrollment, assessment, energy audit, measure installations, and inspections — have not changed. Specific improvements and system enhancements were developed related to the elimination of the “Go-Back” and “Modified 3 Measure Minimum” rules. SCE’s priority continues to focus on outreach and program delivery to households not yet treated; however, lessons learned from ESA implementation in the Aliso Canyon affected area, SCE was able to identify customers previously treated that may be eligible for new measures and/or measures based on changes to the ESA Program. For example, income-qualified customers that had a refrigerator manufactured from 1999–2000 were targeted and offered the opportunity to replace the refrigerator and potentially receive new measures, such as LEDs and advanced power strips.

Use of Athens Research eligibility estimates helped improve identification of under-penetrated areas within SCE's service territory and served as the foundation of planned marketing and outreach efforts. The Customer Marketing Tool module helped to strategically group customers specific to a targeted effort, assisted in gathering customers based on the criteria of particular efforts (Climate Zone, County, City, ZIP Code, etc.), and ultimately tracked the results of each effort. SCE continued its aggressive integration and partnering efforts among the ESA Program, local governments, and organizations that serve the disabled community, in order to increase program penetration and bring benefits to a wider range of customers.

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 — in the field instead of in their 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 each customer's previous participation and eligibility while in the

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customer's home, thus eliminating needless return visits. In 2017, 230 ESA Program representatives from 17 different service providers used the paperless enrollment process to enroll 36,551 qualified customer households.

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

To pave the way for the technology which will allow customers to view their end-use and electric usage profiles, SCE mobile optimized:

- ESA Program application page and web status inquiry page (\$126,360)
- CARE Program enrollment and recertification page, and the post enrollment verification upload page (\$586,203.75)

SCE is also currently mobile optimizing the usage presentment page available to My Account users in SCE.com. The 2017 cost associated with this effort is \$546,203.75 and is scheduled to be released in 2018.

In 2017, SCE continued to collaborate with the other IOUs in redeveloping a statewide Energy Education Resource Guide, including information regarding My Account and additional resources to that may benefit the customers. The new guide is expected to be released mid-2018.

1.4 Energy Savings Assistance Program Customer Enrollment

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

Approximately 19.7% percent of the homes treated in 2017 are classified as "go backs/retreated." These customers were identified as having received services between 2002 and 2016.

Table 1.4.1

No. of Homes Treated in 2017	No. of Service Accounts Treated in 2017 Previously Treated in 2002-2016	Percentage of Go Back Homes
80,333	15,813	19.7%

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:

- SCE and SoCalGas have engaged in a "blueprinting" effort to examine their internal processes to identify areas of alignment that will make enrollment procedures more efficient. One initiative in this effort released in 2017 is "Joint ESA Mobile," a mobile-optimized site which provides a paperless joint enrollment process. ESA Mobile increases efficiencies by providing real-time information on customer previous participation for both utilities, eliminating the need for two separate forms and reducing the time it takes to complete the enrollment into both programs. Furthermore, this eliminates data entry into the two utilities' databases, reducing the time between assessment and measure installation. Unlike the original mobile site, EMAPS On-the-Go, ESA Mobile can be accessed using any platform, which means it does not limit the contractors to a specific tablet brand and model. As a result, more outreach representatives are opting to use this paperless process instead of paper enrollment forms.
- Customers who can provide documentation proving that 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 launched a mobile optimized online enrollment form which provides customers' immediate feedback on participation eligibility, status, and assigned contractor information, if available. Furthermore, SCE launched a mobile optimized web inquiry form which provides customers real time status on their ESA participation. This eases the enrollment process for the customer by providing a convenient and easy way to apply for the program and follow the status of their enrollment.

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 exceeded the 2017 annual goal of homes treated.

The most significant programmatic barriers in previous years were the Go-Back and Modified 3 MM Rules. However, 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

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low-income population that have not been part of our outreach efforts, 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.

1.5 Disability Enrollment Efforts

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

SCE continued its efforts to identify and enroll low-income customers with disabilities and opportunities to work with disability-related community-based organizations. Our targeted customer outreach efforts encouraged households to reach out to ESA contractors to schedule an assessment of their homes to determine their eligibility for program measures. While on the call, the customer may self-identify that they or someone in the household is disabled or during the in-home assessment, the contractor may learn that someone living in the home is disabled.

In 2017, SCE met with Center for Accessible Technology (CforAT) to review current enrollment and installation processes and how they could be improved.

Furthermore, SCE has been evaluating a new path that could help strengthen penetration goals for customers with disabilities. Specifically, SCE is looking to replicate efforts completed by other utilities with the deaf community.

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

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 specialized needs.

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

Table 1.5.3. Information on Enrollment of Customers with Disabilities

Source	Total Enrollments	Disability Enrollments	% of Disability Enrollment
SCE Referral	27,489	4,428	16%
Joint Utility	38,949	4,336	11%
Outreach	21,058	2,049	10%
Total	87,496	10,813	12%
Target Enrollment Rate			15%

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

In 2017, SCE continued to implement marketing and outreach tactics targeting customers with disabilities in an effort to reach the 15% target. Although the combined overall target was not reached, SCE Referrals achieved the 15% target, whereas Joint Utility efforts fell short. While the 15% target was not documented based on field observations, SCE may have met the 15% participation goal if individuals with disabilities were not accurately self-reported. SCE believes some treated homes may have included members with disabilities that were not classified as such because of the challenge posed by D.08-11-031, Section 7.1, paragraph 3 (page 68), which states:

"The IOUs should not ask customers if they are disabled, but instead allow customers with disabilities to voluntarily self-identify."

According to the Needs Assessment Study report³, 31% of low-income households have one or more members that are disabled. However, participant telephone survey results indicated that 63% of households treated by ESA since 2002 report that they have at least one or more members who the respondent reported as disabled because the survey asked several questions.

SCE will continue to make every effort to achieve the 15% target by seeking new marketing and outreach tactics targeting customers with disabilities and establishing new alliances with organizations offering services to low-income clients with a disability.

³ Evergreen Economics Needs Assessment for the ESA and CARE Programs, Volume 1: Final Summary Report, December 16, 2016, Page 3-26.

1.6 Leveraging Success, Including LIHEAP

Decision 08-11-031 defines leveraging as "an IOU's effort to coordinate its ESA programs with programs outside the IOU that serve low income customers, including programs offered by the public, private, non-profit or for-profit, local, state, and federal government sectors that result in energy efficiency measure installations in low income households". As further detailed below, SCE's progress will be measured by tracking the following criteria:

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

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 work 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 participate in CSD's Low Income Weatherization Program (LIWP) and/or Low Income Energy Assistance Program (LIHEAP), which allows customers to realize the benefits of multiple low-income programs.

In addition, SCE's marketing and outreach efforts included areas identified as Disadvantaged Communities (DAC). SCE recognizes that not every low-income community is a DAC, and that these disadvantaged communities are impacted by low-income residents and/or environmental pollution burdens. SCE will continue to work with other departments to integrate ESA communications with other program offerings within these communities.

SCE contracts with service providers that serve other small and multi-jurisdictional utilities (SMJU) ESA Programs. In areas jointly served by two utilities, contracting with the same service providers allows the IOUs to successfully treat households jointly, resulting in the delivery of a more comprehensive set of services.

SCE also continues to partner with the Single-Family Affordable Solar Homes (SASH) Program administered outside of the utility by GRID Alternatives. Specifically, Grid Alternatives provides SCE with a list of homes determined to

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be eligible for SASH treatment. SCE ensures that the homes on the list are enrolled in the ESA Program and, if they have not been previously enrolled, receive all eligible and feasible measures. This ensures that the energy generated by the solar systems is not wasted by inefficient consumption. See Section 1.7.7, below, for the number of SCE referrals sent to Grid Alternatives in PY 2017.

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. But 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 is also likely to enhance the credibility of marketing for all programs involved, thereby helping 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, whereas being enrolled by separate contractors for each utility usually requires additional trips and expenses.

For SCE's ESA Program dollar savings, energy savings/benefits, and enrollment tracking and reporting associated with leveraging efforts, refer to ESA Program Table 14.

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 the services ESA installed, until they actually make the assessment visit;
- Similarly, ESA contractors are typically unaware of homes previously serviced and services installed through LIHEAP.

As a result, this created wasted time and resources for both ESA and LIHEAP service providers in pursuing previously treated homes that have no remaining feasible measures to be installed.

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SCE enhanced its database to allow contractors working in both the LIHEAP and ESA Programs to access SCE's Energy Management Assistance Partnership System (EMAPS) data on homes treated, services installed, and whether ESA services were installed. During 2017, SCE continued to discuss the best ways to share necessary data and reduce duplication of services.

SCE and the CSD have continued to employ a leveraging framework as a means to increase participation from LIHEAP agencies that are also SCE ESA Program providers and to record installations of measures common to both ESA and LIHEAP.

SCE and the other IOUs met with CSD staff throughout 2017 to discuss data sharing, CSD's LIWP for multifamily properties (MF LIWP) leveraging, and other opportunities directed in D.16-11-022.

CSD provided SCE with an estimated number of multifamily projects within our service territory in order for SCE to calculate the funding level for this effort, with the objective that funding CSD's LIWP in-unit measures provided by the ESA Program would preserve remaining CSD funds to install central systems and common area measures not provided by the ESA Program. SCE's budget for this effort was included in SCE's Conforming Advice Letter⁴. SCE expects to implement in 2018.

In Q4 2017, SCE and CSD entered into a Non-Disclosure Agreement (NDA) for customer-specific energy usage data and information for CSD-treated households to coordinate low-income program activities and objectives. Data sharing efforts with CSD will continue to be implemented in 2018, pursuant to the requirements ordered in D.17-12-009 directing the IOUs to enter into appropriate non-disclosure agreements with CSD to facilitate data sharing⁵.

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

SCE and the IOUs held regular conference calls throughout 2017 to discuss program implementation and strategies. In addition, ESA IOU program staff met in person several times throughout 2017 to discuss and provide updates on water leveraging efforts and acquire knowledge from each of the IOUs.

SCE explored how to apply the new Water-Energy Nexus calculator to aid in identifying cold water measures with potentially significant energy savings. Additional work is expected in 2018 to help inform whether or not SCE will propose the installation of cold water saving measures in the July 2018 Mid-Cycle Advice Letter.

⁴ Conforming Advice Letter submitted on March 24, 2017, and supplemented on June 22, 2017, and authorized by Commission Resolution G-3531, issued December 21, 2017.

⁵ D.17-12-009 Ordering Paragraph (OP) 140.

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Additionally, SCE began developing a memorandum of understanding (MOU) with Metropolitan Water District (MWD) and expects to implement in 2018 for the purpose of coordinating the installation of high efficiency clothes washer measures, if feasible.

1.7 Integration Success

Per 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 2017, 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 (Public Utilities Code §739.1). Section 739.1 authorizes electrical corporations to require CARE Program participants with excessive energy usage (over 600% of baseline) to participate in the ESA Program. Section 739.1 also authorizes electrical corporations to require these households, as a condition of their continued 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 ensures customers receive a fair and balanced review for appeals and actively works to resolve any disputes with the High Usage Appeals Board for customers that assert they should not be removed from the CARE rate.

In 2017, SCE worked with the other IOUs to develop and align internal High Usage appeals process that uses the same criteria to evaluate a customer's appeal.

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 completed its integration efforts with the Middle Income Direct Install (MIDI) Program by employing a single-enrollment approach involving contractors common to and experienced with both programs. By

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employing these service providers, 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 needing to schedule additional visits. 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.

In addition, SCE's ESA Program staff worked with its MFEER Program to develop an integrated strategy targeted to property managers and owners of multifamily buildings for the 2017–2020 program cycle. This strategy focused on common area and included:

- Developing single point of contacts for property managers and owners
- Implementing a layered program approach for property owners / managers through the single point of contact to reduce confusion, and
- Educating property owners / managers and renters on how to get the most energy savings from the program investment.

This effort is known as the ESA Program multifamily common area measures initiative that is expected to be implemented in 2018.

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, including partnering with the City of Norwalk at a first Community Connect event in December. At Community Connect, SCE partnered with the city of Norwalk to plan and execute this event in conjunction with their Snow Days event. SCE brought representatives from various areas of the company, including Income Qualified Programs, to speak directly with eligible customers and inform them of low-income programs. At the event an ESA contractor was successful in scheduling two same-day appointments and completed two near-immediate assessments. In addition, ESA Program materials were made available to SCE's Local Public Affairs representatives to distribute and discuss during routine meetings with the public and government partnership 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, including successes in Air Conditioning Cycling or other 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) in its educational materials. Specifically, customers are provided with an application brochure to participate in SDP. In 2017, approximately 7% of customers that received a central air conditioner replacement either were on SDP or signed up as a result of this effort.

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 described in Section 1.6.1, above. To the extent that MASH funds are available, SCE's MASH program staff meets with multifamily 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 communities and their low-income residents can enroll and take advantage of SCE's Income Qualified Programs (IQP) as a whole.

1.7.7. *Provide the number of referrals to the Single Family Affordable Solar Homes Program Administrator*

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

In 2017, SCE provided 422 such referrals to GRID Alternatives. This will be an ongoing monthly activity.

1.8 Workforce Education & Training

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

During 2017, SCE continued its use of proven strategies to provide training on different aspects of the program to its Service Provider Network, which included installation contractors, CBOs, FBOs, and vendors working in the program. SCE also engaged its service providers directly to better understand their individual training needs.

The training curriculum includes workshops that provide instruction on topics such as the policies and procedures for the various components of the program, back-office best practices, and computer skills training. The Enrollment and Assessment (E&A) training curriculum consists of a two-day service provider-led training workshop that gives trainees comprehensive instruction on policies, procedures for income documentation, customer eligibility, and measure eligibility. Additionally, Program representatives complete training on energy education-related topics. 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 2017, 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, travel costs, and scheduling delays typically associated with face-to-face meetings, and was most effective when delivering training related to changes to existing policies and procedures, since it allowed all service providers to receive the same information.

SCE continued its partnership with SoCalGas to continue offering free online software training to employees of ESA service providers through the CBT Learning System. Courses included Microsoft Office and Windows Navigation, among others. 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 in order to gain and refine skills for that course.

In April 2017, SCE hosted representatives of ESA service providers at an all-day Training Summit 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 2017, but also included breakout sessions among 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.

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During 2017, SCE and SoCalGas continued the practice of reviewing existing ESA Program internal processes in order to identify areas where processes could be aligned and efficiencies gained. The goals of the alignment effort are:

- To increase coordination among the respective ESA Program teams to streamline procedures where appropriate
- To simplify the enrollment of customers into each utility's ESA Program, and
- To maximize the benefits to customers in areas jointly served by SCE and SoCalGas.

During 2017, SCE collaborated with IOUs in redeveloping a statewide Energy Education Resource Guide for use in the field when educating eligible customers; release is anticipated in mid-2018.

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. As of 12/31/2017, these organizations provided approximately 725 jobs that supported the ESA Program. SCE's training includes:

- **Enrollment and Assessment (E&A) Training:** Offered to new employees hired by the ESA Program service providers and required before employees may conduct customer enrollment, income verification, and home assessment activities. Trainees also receive instruction on different approaches to the delivery of energy education. SCE-led training ceased in July 2016 and was migrated to the service providers, who could conduct their own training with curriculum materials developed and provided electronically by SCE. Additionally, Energy Education was migrated from a CBT-based format back to instructor-led. Testing on the training is still managed by SCE ESA Program Training and Compliance. These changes have been received well in the field as they provide greater flexibility for the service provider network.
- **Back-Office Skills Training:** Offered to the employees of ESA Program service providers who process customer enrollments and conduct 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 tools such as Microsoft Word, Excel, and PowerPoint.

Table 1.8.2. Employees Trained

Type of training or recruitment conducted	Employees trained
Enrollment and Assessment (E&A) Training (both SCE and Service Provider-Led)	171
Computer Skills Training* (*does not include Energy Education training)	53

1.9 Legislative Lighting Requirements Status

1.9.1 *Provide a summary of 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 did not experience compact fluorescent light bulb (CFL) supply issues in 2017 due to commitments established with our supplier through our competitive bid process. This enabled a smooth transition to LED lighting. In July 2017, SCE completed a new competitive bid process for LED lighting, so by January 1, 2018, only LEDs will be offered to customers.

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

The ESA home energy education program for customers includes information about the proper disposal of CFLs. The information includes:

- The energy savings benefits associated with replacing incandescent light bulbs with CFLs.
- The toxicity of mercury in CFLs, a substance that can be harmful if not appropriately handled.
- Instructions on the proper procedures for collecting and disposing of 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.*

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' worth of product for all service providers and to 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.*

Four statewide studies were proposed by the IOUs for the 2015-2017 ESA Program cycle following the procedures in the Guidance Document issued in D.14-08-030. These statewide joint IOU studies included:

- A Low Income Needs Assessment (LINA) study
- An Impact Evaluation of the 2015 ESA Program (Impact Evaluation)
- A Non-Energy Benefits (NEB) and Equity Criteria Evaluation, and
- A Phase II ESA Energy Education study.

Given the delayed timing of the D.16-11-022, the following studies were authorized:

- A 2016 Low Income Needs Assessment,
- An additional 2019 Low Income Needs Assessment
- An Impact Evaluation of the Energy Savings Assistance Program, and
- The Non-Energy Benefits study.

The Phase II ESA energy education study was not authorized. The 2016 Low Income Needs Assessment was completed in 2016. Activity associated with the three authorized studies in 2017 is discussed below. Table 1.10.1, below, provides an overview of the Statewide ESA Studies.

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Table 1.10.1. D.16-11-022/D.17-12-009 Approved Evaluation Activities

Study	Lead Consultant	Contracting IOU	Project Initiation	Project Completion	Statewide Budget
2019 Statewide LINA	Research Into Action	SCE	2018	2019	\$500,000
PY2015 Statewide ESA Impact Evaluation	DNV GL	SoCalGas	2017	2019	\$550,000
Statewide NEBs Study	TBD	SDG&E	2018	2018	\$150,000
ESA Portion of the Statewide Energy Efficiency Potential Study	Navigant	N/A	TBD	TBD	\$300,000
Rapid Feedback Research & Analysis ⁶	TBD	N/A	TBD	TBD	N/A
Total					\$1,500,000

1.10.1.1 Statewide Low Income Needs Assessment (LINA) Study

The LINA Study is mandated to be updated every three years per AB 327 and PUC Sec. 382(d). Energy Division and the IOUs initiated the upcoming (2019) LINA with a public workshop on May 19, 2017 to discuss the scope of work for the LINA authorized in D.16-11-022. In March of 2017 the joint IOUs sought to have the recommended scope modified via a Petition for Modification. The recommendation was denied in December 2017. The Energy Division and Joint IOUs prepared and released a Request for Proposal (RFP) for this work in November 2017. Research Into Action was selected as part of the competitive bidding process for January 2018. SCE holds the contract which will be completed in January 2018. A project initiation meeting is to be held in February 2018. A public workshop is anticipated to be held during Q2 2018 following the development of the draft research plan. The data collection analysis is expected to occur during 2018. The next Low Income Needs Assessment Study will be completed by December 2019.

1.10.1.2 Statewide ESA Energy Savings Impact Evaluation

Current ESA impacts are necessary for planning the next program cycle, and following the direction of Energy Division, the joint IOUs issued a

⁶ Rapid Feedback Research & Analysis is not a statewide study. Each IOU has its own budget with which to propose research.

Request for Proposals to conduct the time-sensitive statewide ESA impact evaluation in November 2015. The project was awarded via a competitive bid to DNV-GL in February 2016, pending authorization of the study by the Commission. The contract is held by SoCalGas and was finalized in January 2017 after official authorization via D.16-11-022. The study initiation meeting was held in February 2017. A public workshop on the research plan was held in September 2017. Initial results are anticipated in March 2018, to be used in the Mid-Cycle Update Advice Letter filing on July 16, 2018. The Final Report is expected to be completed in March, 2019.

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

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

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

D.16-11-022 and D.17-12-009 assert the benefit of following the guidelines established in the mainstream Energy Efficiency proceeding. Studies are required to solicit public input on research and deliverables via workshops or webinars and the CPUC's energydataweb. Parties are encouraged to submit written comments on the work before and/or after the public meetings; these comments will be posted on the public document website. Notice of the public meetings will be sent to subscribers on the public document website and to the applicable service. Beyond the authorized studies, any additional studies or analyses commenced via the ESA Program Rapid Feedback and Analysis funding adhere to on the project initiation and execution requirements outlined in Section 5 of *Energy Division & Program Administrator Energy Efficiency Evaluation, Measurement and Verification Plan, Version 5270*. During 2017 no rapid feedback studies or analyses were initiated by SCE.

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

No studies were completed in 2017. The proposed study budgets are included below in Table 1.10.2.

Table 1.10.2. 2015–2017 Authorized Studies & Expenditures

Proposed Study	Lead Consultant	Managing Utility	Authorized Budget⁷	SCE Budget	2017 Expenses
2019 Statewide LINA	Research Into Action	SCE	\$500,000	\$150,000	\$0
PY2015 Statewide ESA Impact Evaluation	DNV GL	SCG	\$550,000	\$165,000	\$56,824
Statewide NEBs Study	TBD	SDG&E	\$150,000	\$45,000	-0-
ESA Portion of the Statewide Energy Efficiency Potential Study	Navigant	SCE	\$300,000	\$150,000	-0-
Rapid Feedback Research & Analysis	TBD	SCE	N/A	\$200,000	-0-

1.11 Pilots

1.11.1 *For each Pilot, provide 1) a summary describing the activities undertaken since its inception; 2) the 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).*

D.16-11-022 directed the three electric IOUs to propose a Programmable Communicating Thermostat Pilot (PCT), aligned with the recommendations included in Appendix A of D.16-11-022. On March 24, 2017, the Joint IOUs filed a Petition for Modification (PFM) of D.16-11-022, requesting clarification of the timing of the PCT pilot. In response to the Joint IOUs PFM, the Commission issued D.17-12-009 on December 14, 2017 ordering the IOUs to file a Tier 2

⁷ This amount represents the total Joint Utility study budget authorized in D.16-11-022. Bridge funding was authorized to pay for work completed on the 2016 LINA Study. The authorized Joint Utility budget split for all studies is: PG&E – 30%, SCE – 30%, SCG – 25%, and SDG&E – 15%. Authorization and budgets for the studies listed below.

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Advice Letter no later than March 1, 2018 with the goal to have the pilot in place for the 2018 summer season. In 2018, SCE will file the PCT pilot in accordance with CPUC directives.

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 response to Section 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 Attachment I in the D.14-08-030 guidance document.⁸

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 Program 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.

1.13 Low-Income Working Groups

D.12-08-044 and D.16-11-022 authorize Energy Division to form Working Groups to yield a fair, informed, balanced, and productive review of issues that a particular working group must review. A summary of authorized Low Income Working Groups and activities taken are described below.

1.13.1 *ESA Cost Effectiveness Working Group*

The members participating in the Cost Effectiveness Working Group (CEWG) include representatives from the following organizations: CPUC Energy Division, CPUC Office of Ratepayer Advocates, National Resources Defense Council, The Utility Reform Network, TELACU / ACCES/ Maravilla, Synergy Companies, and the IOUs. D.16-11-022 instructed the CEWG to reconvene and address the tasks outlined below:

⁸ See D.16-11-022 Ordering Paragraphs (OP) 41 (Envelope & Air Sealing), OP 45 (Central AC), OP 46 (Room AC), OP 48 (Heat Pumps), and OP 52 (Central AC Service).

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

In accordance with item 1 above, a proposed schedule and work plan was submitted to the service list on January 11 2017. In addition, the CEWG met monthly throughout 2017 by teleconference and in person to discuss topics that will be used to inform the next program cycle. The CEWG began drafting a report in Q4 of 2017 with final recommendation to be completed in 2018.

1.13.2 Multifamily Working Group

The Multifamily Working Group (MFWG) was established to provide input on program design and the implementation strategy to integrate multifamily common area measures into the ESA Program, as specified in D.16-11-022 and D.17-12-009.⁹

SCE and the other IOUs each provided an initial implementation outline in August 2017 with the following components:

- Deed-restricted properties
- Single Point of Contact (SPOC)
- Delivery approach
- Common Area: definition, list of potential measure categories

⁹ D.16-11-022/D.17-12-009, Ordering Paragraph, 62, 63 and 64.

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MFWG members continued to meet and provide input, including hosting two conference calls that solicited feedback from property owners/operators. Additionally, the MFWG facilitator has provided updates at the Low Income Oversight Board meetings.

The MFWG developed an Annual Report describing the working group composition and structure, and detailing the 2017 activities. (Posted to: www.energydataweb.com).

1.13.3 Mid-Cycle Working Group

The MCWG was reconvened in February 2017. The members participating in the Working Group include representatives from the following organizations: CPUC Energy Division, The Office of Ratepayer Advocates, IOUs, Energy Efficiency Council, TELACU, and Proteus. D.16-11-022 instructed the Mid-Cycle Working Group to reconvene and address the tasks outlined below:

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

Several in-person meetings, as well as multiple conference calls and webinars were held in 2017 to address these tasks. The MCWG submitted its initial recommendations on April 3, 2017, with final recommendations to be submitted in the second quarter of 2018.

1.13.4 CARE Restructuring Working Group

The 2015 Residential Rate Proceeding D.15-07-001¹⁰ initiated a Phase 3, which, among other things, ordered:

- CARE restructuring under AB 327
- Options for leveraging the FERA program to provide direct incentives to large income-qualified households.

A CARE Working Group was formed and worked through 2017 to identify and examine IOU data sets with the goal of presenting a consensus recommendation by January 31, 2018. In December 2017, at the request of Energy Division staff, and after consultation with the working group, SCE filed a joint motion on behalf of parties to suspend¹¹ the requirement that parties provide recommendations to be included in the IOU's 2018 Rate Design Window filings, citing other priorities associated with the proceeding. On December 20, 2017, ALJ Park issued a Ruling via e-mail granting the suspension of the CARE restructuring track until further notice.

1.13.5 Demand Analysis Working Group

D.17-12-009¹² identified a new Demand Analysis Working Group, which includes representation from the California Energy Commission (CEC), California Independent System Operator (CAISO), IOUs, and other interested stakeholders. These stakeholders act as the established forum for providing input into the scope, modeling, and analysis of results associated with the Energy Efficiency Potential Study. In support of that goal SCE provided 2017–2020 ESA measure installation projections, based on various limiting factors (for example, historical eligibility and customer acceptance rates by measure). Navigant Consulting used these projections as the best-available basis for ESA measure installation potentials in years beyond 2020. In 2017 Navigant issued the *Energy Efficiency Potential and Goals Study for 2018 and Beyond*.

1.14 Annual Public ESA Program and CARE Meeting

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

In compliance with D.12-08-044, the IOUs held a public forum at the CPUC on June 22, 2017, to present an overview of their 2016 ESA and CARE Program results.

¹⁰ D.15-07-001, p. 298

¹¹ This suspension of the schedule is necessary due to parties' focusing on other priorities associated with R.12-06-013, and because the IOUs recently concluded discussions with parties and the ED to finalize a consensus dataset, which is essential for further consensus-building discussions on potential CARE restructuring and reform concepts and measures.

¹² D.17-12-009, OP 8.

1.15 Multifamily Properties

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

No projects were completed in 2017. The ESA Program multifamily common area measures initiative plan is expected to be implement in 2018.

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

D. 16-11-022 requires SCE to investigate coordination with the California Advanced Services Fund's (CASF) new Broadband Public Housing Account to promote deployment of high-quality advanced communications services to all Californians, including those residing in public and multifamily housing. In 2017, SCE partnered with CASF and provided Broadband information in a limited marketing campaign. Further efforts will be conducted in 2018.

2. California Alternate Rates For Energy (CARE) Annual Report

2.1 CARE Executive Summary

SCE's California Alternate Rates for Energy (CARE) program provides extensive outreach to income-eligible households to encourage enrollment in the 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 2017. At year-end 1,222,526 customers were on the CARE rate, resulting in a penetration rate of 83.9%. SCE continues to work towards meeting the Commission's directed CARE Program goals and objectives.

2.2 Participant Information

2.2.1 *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 2.2.1. Residential CARE Program Customers by Month

Residential CARE Program		
Electric Customers By Month		
PY 2017	CARE Customers	Percentage Change
January	1,235,889	-
February	1,229,930	-0.4%
March	1,223,435	-0.4%
April	1,216,332	-0.5%
May	1,221,040	0.3%
June	1,235,413	1.0%
July	1,221,695	-0.9%
August	1,228,027	0.4%
September	1,237,443	0.6%
October	1,227,268	-0.7%
November	1,218,713	-0.6%
December	1,222,526	0.3%

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

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

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

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

Estimates from the block group level are aggregated to county / utility and whole utility level, among other aggregations. Annually, SCE 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.

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

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

In 2012, Athens developed an improved method for estimation of payer status-specific eligibility. This method took into consideration American Community

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Survey microdata relationships between guideline status (above/below 200 percent FPG), tenure, and fuel payment relationships. These cross classifications are fitted to small area (block group) marginal to produce payer type specific distributions, which can be aggregated to various other geographical levels.

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

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

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

CARE eligibility rates by small and large areas are developed so that they apply to individual residential meters and sub-metered dwelling units only.

Non-sub-metered master meters and other meters that do not provide residential service are not included in the “technical eligibility” meter counts.

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

See SCE’s response above to Section 2.2.2. Note that the methodology is based on estimating small area (block group) level household size by income and householder-age tabulations for the current year and connecting these estimates with small area counts of households that are individually metered or sub metered. Block group/utility-specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area: zip+2, zip, tract, county, territory, etc. Statewide estimates, regardless of utility boundaries, are also provided at small and large area levels.

2.2.2.4 Describe how current CARE customers were counted

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

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

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

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

Electric: 32.5%

Gas: N/A

The estimate of current demographic CARE-eligible rates by energy source at year-end is 32.5 percent.

2.2.4 *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 63,976.

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

Electric: The current CARE sub-metered tenant count by energy source at year-end is 32,201.

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

Electric: The current CARE sub-metered penetration rates by energy source at year-end is 50 percent.

2.2.7 *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 their recertification of CARE and Family Electric Rate Assistance (FERA) eligibility. This approach has proven to be more effective than the previous tactic of solely approaching mobile home park owners and/or managers in increasing tenant enrollments and recertifications.

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

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2.3 CARE Program Summary

2.3.1 Please provide CARE program summary costs.

Table 2.3.1. CARE Program Summary Costs

CARE Budget Categories	Authorized Budget	Actual Expenses	% of Budget Spent
Outreach (Includes Automatic Enrollment)	\$2,352,087	\$2,578,703	91%
Processing, Certification, Recertification ^[1]	\$1,116,895	\$1,122,436	100%
Post Enrollment Verification ^[2]	\$338,165	\$655,435	194%
Information Tech./Programming	\$4,060,000	\$1,145,445	28%
Pilots ^[3]	\$457,992	\$525,000	87%
Measurement and Evaluation	\$–	\$150,000	0%
Regulatory Compliance	\$270,598	\$367,342	74%
General Administration	\$548,097	\$664,086	83%
CPUC Energy Division Staff	\$127,755	\$140,000	91%
Cooling Centers	\$26,454	\$41,461	64%
Total Expenses	\$ 6,706,298	\$9,981,653	67%
Subsidies and Benefits ^{[3] [4]}	\$375,043,839	\$457,873,645	82%
Total Program Costs and Discounts	\$381,750,137	\$467,855,298	82%
^{[1] [2]} SCE shifted \$5,541 to Post Enrollment Verification and \$317,270 to Processing, Certification & Recertification from IT Programming. See 2017 ESA/CARE Annual Report Fund Shifting section. ^[3] Subsidies and benefits include rate discounts. ^[4] This cost is for the CHANGES pilot program (outreach, education, need and dispute resolution services to limited English-proficient customers in California).			

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2.3.2 *Please provide the CARE program penetration rate to date.*

Table 2.3.2. CARE Penetration

Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
1,222,526	1,457,787	83.9%	No

2.3.3 *Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE re-certification efforts, and the nature of the complaints.*

SCE received one CARE recertification complaint in September when a customer contacted the CPUC and the Better Business Bureau stating that SCE removed them from the CARE rate in error for two billing cycles. The customer did not respond to SCE's recertification requests and was removed from the discounted rate for non-response. To expeditiously resolve the complaint, SCE advised the customer to immediately recertify eligibility on SCE.com. After further account review, the customer's request for retroactive credit was granted and the complaint was resolved to the customer's satisfaction. Please note the draft has not yet been properly formatted and will be provided to our tech writer who will keep a master copy to start making formatting and grammatical changes. Any edits received on SharePoint will be forwarded to her to incorporate into the master draft.

2.4 CARE Program Costs

2.4.1 *Discount Cost*

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

The average monthly discount per CARE customer was \$25.44.

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

Electric Subsidy: \$375,043,839.

The annual subsidy (discount) for all CARE residential program customers was \$375,043,839.

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2.4.1.3 Provide the Number and Percent of Green Tariff Shared Renewables (GTSR) and Enhanced Community Renewables customer base. Also provide the average total bill discount.

Number and Percent of CARE customers on GTSR and Enhanced Community Renewables: 61 and 0.005%.

Average Total Bill Discount of CARE-enrolled GTSR / Enhance Community Renewables customers received (in percentage terms) from the CARE Program discount on the delivery portion of their bill: 16%.

Average Total Bill Discount of CARE-enrolled GTSR / Enhance Community Renewables customers received (in percentage terms) from the CARE Program an overall discount on their bill: 29%.

2.4.2 *Administrative Cost*

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

See Section 2.3.1, above.

2.4.2.2 Explain what is included in each administrative cost category.

The requested information is provided in Table 2.4.2, below:

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Table 2.4.2. CARE Administrative Cost Categories

Category	Description
Outreach	Includes: Bill inserts, advertising, applications (printing and mailing), posters, brochures, flyers, postage, other outreach, staff labor, costs related to outbound dialing, 800#, and Capitation Fee Project.
Processing, Certification, and Re-certification	Includes: Staff labor, information technology, application processing, training, programming labor, and sub-meter certification.
Post Enrollment Verification (PEV)	Includes: Staff labor, information technology, verification processing, training, programming labor, and sub-meter verification.
Information Technology (IT) / Programming	Includes: Programming and labor costs associated with system enhancements, Decision compliance, and maintenance of existing processes.
Pilots	Includes: Cost of Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) program.
Cool Centers	Includes: Refreshments and personal cooling devices for Cool Center attendees, and system updates for geolocation webpage.
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.
Commission Energy Division Staff Funding	Includes: CPUC Energy Division Staff expenditures.

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

Electric CARE: \$13,044,402.89.

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, 2017 was \$13.04 million.

2.4.4 *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 administrative costs associated with the CARE Program to SCE's Public Purpose Programs rate component. D.02-09-021¹³ 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 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.

¹³ 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 to include an entry to allow for the transfer of the year-end balance recorded in the CBA to the Public Purpose Programs Adjustment Mechanism (PPPAM).

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

See Table 2.4.5, below.

Table 2.4.5: CARE Surcharge and Revenue Collected by Customer Class (2017)

Customer Class	Average Monthly CARE Surcharge	Average Monthly Bill	CARE Surcharge as Percentage of Bill	Total Annual CARE Surcharge Revenue Collected	Percentage of Total Annual CARE Surcharge Revenue Collected
Residential¹⁴	\$9,187,116	\$421,978,950	2.2%	\$110,245,398	28.6%
Agricultural	\$608,131	\$16,666,306	3.6%	\$7,297,575	1.9%
Commercial	\$17,733,119	\$464,007,708	3.8%	\$212,797,432	55.3%
Industrial	\$2,790,130	\$47,313,075	5.9%	\$33,481,566	8.7%
Public Authority	\$1,714,561	\$42,780,259	4.0%	\$20,574,736	5.3%
Railroads	\$36,343	\$1,066,714	3.4%	\$436,121	0.1%
Interdepartmental¹⁵	\$648	\$26,452	2.4%	\$7,771	0.0%
Totals	\$32,070,050	\$993,839,464	3.2%	\$384,840,599	100.0%

2.5 Outreach

2.5.1 *Discuss utility outreach activities and those undertaken by third parties on the utility's behalf, including Lifeline coordination.*

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

¹⁴ Excludes CARE customers.

¹⁵ Electricity supplied for Edison-owned water & gas operations on Santa Catalina Island.

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SCE's goal is to enroll as many eligible customers as are willing to participate in CARE. CARE enrollment decreased from 1,235,755 on December 31, 2016, to 1,222,526 on December 31, 2017, which represents a net decrease of 13,229.

As part of D.16-11-022¹⁶ SCE worked with IOUs to develop the 2017–2020 Marketing, Education and Outreach marketing plans. These plans provided detailed presentations addressing customer enrollment barriers, marketing objectives and strategies, and integration with Residential Rate Reform, Statewide ME&O, Energy Efficiency and Demand Response Programs, AB793 (Energy Management Technologies), and Aliso Canyon efforts in Southern California, and were shared on May 23, 2017. These plans helped shape tactics to target, educate, and ultimately enroll customers in CARE and ESA programs.

In 2017, SCE hosted several events celebrating Black History Month, Asian American Pacific Islander Month, and Hispanic Heritage Month in the communities we serve. In previous years, SCE celebrated at our Irwindale Energy Education Center, but now prefers to join the community, rather than have the community come to SCE. These events provided a wealth of information on programs and services, including the CARE, FERA, and ESA Programs, available to customers, businesses, and nonprofit organizations. This strategy builds program awareness at a grassroots and community level where many income-qualified households may connect.

In 2017, SCE participated in nearly 130 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, and winter festivals, more than 125,000 customers received information on the CARE, FERA, and ESA Programs as ways to help lower their energy usage and electric bills.

Lifeline coordination did not occur in 2017. Due to data privacy restrictions, Lifeline was unable to share data with the IOUs, and the bi-directional data share requirement was removed from D.17-12-009. Lifeline customers will be allowed to opt in or opt out of the data sharing process. The CPUC's Energy Division is currently undertaking an RFP process to obtain a new Lifeline administrator.

SCE was also required to consult the Lifeline administrator when designing websites to ensure that they effectively reach low-income customers who are on both CARE and Lifeline. In 2017, SCE began optimizing its web pages and received an extension to finalize optimization of MyAccount. SCE will continue to work with the Energy Division and the new Lifeline Administrator on all pertinent matters going forward.

¹⁶ D.16-11-022, OPs 35, 36 and 37.

2.5.1.1 The CHANGES Pilot Program

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). This pilot was authorized as an ongoing program in D. 15-12-047, adopted on December 15, 2015, and became permanent on June 1, 2016. The program provides customers who speak limited English in-language education, needs and dispute resolution, and outreach for energy issues. The program is administered through a contract with the CPUC, using the same community contractor, Self Help for the Elderly (SHE) and 27 CBOs, which also administer the CPUC's Telecommunications Education and Assistance in Multiple-Languages (TEAM) program.

The CHANGES CBOs during the pilot in SCE's service territory were: 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. When the program became permanent on June 1, 2016, all 28 CHANGES CBOs were authorized to work on cases from any IOU (for example, in the pilot, the CBOs up north were limited to PG&E, but that is not the case any longer.) The following is a list of the CBOs:

1. ACC Senior Services
2. Afghan Coalition
3. Alliance for African Assistance
4. American Relief Society
5. Asian American Resource Center
6. Asian Community Center
7. CASA Familiar
8. Central California Legal Services
9. Centro la Familia Advocacy Services, Inc.
10. Chinatown Service Center
11. Chinese Newcomers Service Center
12. Deaf Community Services of San Diego
13. Delhi Center
14. El Concilio of San Mateo County
15. Fresno Center for New Americans
16. Good Samaritan Family Resource Center
17. International Institute of Los Angeles

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18. International Rescue Committee
19. Korean American Community Services
20. Koreatown Youth And Community Center
21. Lao Khmu Association, Inc.
22. Little Tokyo Service Center
23. Madera Coalition for Community Justice
24. Portuguese Community Center
25. Self-Help for the Elderly
26. Southeast Asian Community Center
27. SUSCOL Intertribal Council
28. Southland Integrated Services

The Resolution directs the pilot to be funded by the IOUs through CARE outreach program funding. SCE pays the CPUC directly through monthly invoices.

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

- **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.
- **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 36 languages.
- **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 activities shown in Table 2.5.1-A, below, for SCE (January — December 2017):

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Table 2.5.1-A. CHANGES Activities

Component (in language)	Activity
Community Events:	
<ul style="list-style-type: none"> • Cantonese • Chinese • English • Japanese • Mandarin • Spanish • Vietnamese 	CBOs did outreach and distributed materials at several local events
Media:	
<u>Television</u> None	
<u>Radio</u> <ul style="list-style-type: none"> • Korean • Vietnamese 	<ul style="list-style-type: none"> • KYPA – 1230 AM Radio • Bolsa Radio
<u>Print</u> <ul style="list-style-type: none"> • Armenian – reached 12,550 	<ul style="list-style-type: none"> • Molorak Weekly • Azbarez Armenian Daily Newspaper
<u>Social Media</u> <ul style="list-style-type: none"> • Twitter Tweets • Facebook Posts • Instagram Posts • Other Networks 	
Consumer Education: By Topic	
<ul style="list-style-type: none"> • Armenian • Cambodian • Cantonese • English • Farsi • Indonesian • Japanese • Korean • Mandarin • Russian • Spanish • Tagalog • Vietnamese 	<p>CBOs provided small workshops with topics including:</p> <ul style="list-style-type: none"> • Understanding Your Bill • Safety Tips • Level Pay Plan • Energy Conservation • CARE/FERA and Other Assistance Programs • Avoiding Disconnection • Gas Aggregation • High Energy Use <p>Also provided one-to-one education with SCE / SoCalGas customers (4013 were SCE attendees).</p>

2.5.1.3 Marketing

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

- IQP and other assistance programs (CARE, FERA, ESA, Level Pay Plan and Medical Baseline) were featured in customers' monthly electric bill 'onsets' – preprinted newsletter-type communications – with articles providing resources to help reduce their electricity bills.
- Throughout 2017, SCE continued to reach out to 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.
- As part of the CARE annual solicitation process in June 2017, SCE included CARE enrollment applications in the bills of over 2 million customers receiving a paper bill (not those receiving bills online). Because of this effort, nearly 9,000 new households began receiving the CARE rate discount.
- SCE's Customer Communications Organization within SCE's Call Centers continues to utilize the online 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 2017, more than 78,000 eligible low-income customers were enrolled through Call Center outreach efforts. (This includes all web enrollments and Call Center-mailed applications.)
- 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 2017, nearly 40,000 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

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Capitation Fee Program continues to show increased enrollments from agencies that were previously inactive. In 2017, capitation contractors successfully enrolled 2,365 new customers in the CARE Program.

- SCE enrolls new CARE customers through the EAF program to provide utility payment assistance through voluntary customer, employee, and SCE shareholder donations. The EAF income requirements are the same as those for CARE. In 2017, 839 EAF recipients were enrolled in the CARE Program.

2.5.1.4 Paid Media (Advertising)

The 2017 IQP advertising campaign utilized digital banners (desktop and mobile) and Search Engine Marketing (SEM) placements. Digital media ads were placed through Maxpoint, a top-performing advertising network. The campaign generated over 32.2M (million) impressions targeting Hispanic, Asian, and General Market audience segments:

- SEM targeted all customers throughout the SCE service territory and delivered 353,654 impressions, 18,790 clicks, and a 5.31% click-through rate (CTR). We saw a 480% increase in SEM CTR performance in 2017 compared to 2016.
- Desktop display and mobile placements targeted General Market, Asian, and Hispanic segments with a household income less than \$75,000. The desktop and mobile placements delivered a total of 30.6M impressions and 64K (thousand) clicks at a CTR of 0.21%.
- All three social ads exceeded our 2017 CTR benchmark of 1.43%. General Market generated a 2.04% CTR and Hispanic reached a 2.19% CTR.

2.5.1.5 General Market

The advertising campaign launched November 13 and ran through December 31, 2017. General Market media delivered a total of 12,162,326 impressions, including over 1.2 million impressions that spilled into the African American market.

2.5.1.6 Digital Summary:

Creative ran on desktop and mobile platforms:

- Desktop placements delivered 3,631,738 impressions and a CTR of 0.11%.
- Mobile placements delivered 8,530,588 impressions and a CTR of 0.23%.
- Low Income IQP Facebook carousel ad delivered 322,333 impressions and generated a 2.04% CTR (above 2017 click-through rate benchmark of 1.43%).

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2.5.1.7 Asian Market

The Advertising campaign launched November 13 and ended December 31, 2017. Asian media delivered a total of 7,415,348 impressions.

2.5.1.8 Digital Summary

Digital placements were delivered in-language to Cambodian, Chinese, Vietnamese, Tagalog, and Korean audiences across desktop and mobile devices:

- Desktop placements delivered 1,297,342 impressions and a CTR of 0.23%.
- Mobile placements delivered 6,118,006 impressions and a CTR of 0.27%.

2.5.1.9 Hispanic Market

The Advertising campaign launched November 13 and ended December 31, 2017. Hispanic media delivered a total of 11,038,938 impressions.

- Desktop placements delivered 4,549,036 impressions and a CTR of 0.05%.
- Mobile placements delivered 6,489,902 impressions and a CTR of 0.29%.
- The Hispanic (excluding low-income) IQP Facebook carousel was the top performing post. This post garnered 801,332 impressions and reached a 2.88% CTR. The strong performance can be attributed to the large scale which allowed the Facebook AI to best optimize.
- The Hispanic low-income Facebook carousel ad delivered 113,484 impressions and generated a 2.19% CTR (above 2017 click-through rate benchmark of 1.43%)
- The strong performance for the two Hispanic ads can be attributed to their high relevancy scores of 7/10 and 8/10 which means the content resonated strongly with the target audience.

2.5.1.10 Owned Media (InsideEdison.com Stories)

- **July 25, 2017:** SCE Prescribes Outage Preparedness for Medical Baseline Customers (also in Vietnamese, Chinese, Korean, Spanish, Khmer, Tagalog)
- **June 26, 2017:** Cool Savings Available to Income-Qualified Customers (also in Vietnamese, Chinese, Korean, Spanish, Khmer, Tagalog)

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- May 26, 2017: Five Ways to Save Energy, Money During the Hot Season
- **May 19, 2017:** Bill Assistance Program Helps Customers in Need (also in Vietnamese, Chinese, Korean, Spanish, Khmer, Tagalog)

2.5.1.11 Earned Media

In 2017, coverage of SCE's income-qualified programs resulted in 25 earned media stories: 11 in Asian media outlets, 6 in Hispanic media, 3 in African American, and 5 in general media:

- **December 20, 2017: Idyllwild Town Crier** –“Prepare and plan for a ‘next’ power outage” mentions that Edison tries to inform or alert medical baseline customers ahead of outages, especially maintenance or planned rotating outages,” but added that “these individuals should always be prepared with an emergency plan and be ready to implement it in the event an unexpected outage or power reduction occurs to ensure safety until electricity is restored.”
- **August 29, 2017: Sing Tao Daily** –“Heat Wave May Result in Power Outage, People Who Rely on Electrical Medical Devices Should Have an Emergency Plan”
Reports on how SCE customers with medical needs that depend on electricity-powered equipment can prepare for power outages.
- **August 16, 2017: Viet Bao Daily News** –“SCE Prescribes Outage Preparedness for Medical Baseline Customers”
Reported on how SCE customers with medical needs that depend on electricity-powered equipment can prepare for power outages.
- **August 3, 2017: San Bernardino American News** –“SCE Prescribes Outage Preparedness for Medical Baseline Customers”
Quotes Kari Gardner on SCE’s Medical Baseline program
- **August 2, 2017: El Panamericano (CA)** –“Bill Savings, Vegetation Safety Programs Highlighted”
Article mentions vegetation safety and CARE/FERA programs
- **August 1, 2017: Fresno Bee** – “Is your electric bill too high? These discount programs may help”
Programs available to help Southern Californians find relief from “ballooning power bills from nonstop home cooling” this summer. The article reports SCE “has partnered with local organizations to offer one-time bill payments of up to \$100 for needy households,” while both SCE and Pacific Gas & Electric “offer discounted rates for low-income households.

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- **July 31, 2017: KMET AM** –“Gardner Explains SCE Saving Programs”

SCE’s Kari Gardner discusses ways that customers can save money on their summer electric bills and beyond. Gardner mentions the California Alternate Rates...for Energy (CARE) and Family Electric Rate Assistance (FERA) programs prominently.

- **July 23, 2017: KFNY AM** –“Villegas Promotes Water Safety, Conservation and SCE Programs”

The interview also touched on SCE’s income-qualified programs. Robert explained how one-third of SCE’s customers qualify to such programs. He encouraged listeners to check if they qualify for them either via phone or through SCE’s website.

- **July 21, 2017: Sing Tao Daily** – “Cool Savings Available to Income Qualified Customers”

Includes information about CARE/FERA programs and coverage on CARE/FERA bill assistance programs and how customers can keep bills down in the summer.

- **July 14, 2017: Pakistan Link** – “Cool Savings Available to Income Qualified Customers”

Coverage on CARE/FERA bill assistance programs and how customers can keep bills down in the summer.

- **July 13, 2017: Los Angeles Sentinel** – “Bill Assistance Program Helps Customers in Need”

Coverage on the Energy Savings Assistance Program and how income-qualified customers may be eligible for free appliances.

- **July 13, 2017: World Journal** – “Electricity Discount Programs to Save 30% Per Month”

Coverage on CARE/FERA bill assistance programs and how customers can keep bills down in the summer.

- **July 13, 2017: CTI-TV** –“SCE Electrical Subsidy Programs...In the Hot Summer, SCE’s Two Money Saving Programs Can Help You Save Money”

Coverage on CARE/FERA bill assistance programs and how customers can keep bills down in the summer.

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- **July 13, 2017: ZWTV** – “SCE Electrical Subsidy Programs...In the Hot Summer, SCE’s Two Money Saving Programs Can Help You Save Money”

Coverage on CARE/FERA bill assistance programs and how customers can keep bills down in the summer.

- **July 7, 2017: Asian Journal Publication** – “Cool Savings Available to Income Qualified Customers”

Carries a piece originally published on Inside Edison reporting that income-qualified customers may be eligible for free appliances and no-cost installation as part of SCE’s Energy Savings Assistance Program.

- **July 7, 2017: Korea Times** – “CARE/FERA Programs Help Reduce Your Electric Bills Up to 30 Percent”

Details SCE’s CARE/FERA energy conservation programs that help reduce electric bills, especially during the summer when electricity usage is high. Explains the CARE Program can help income-qualified customers save about 30 percent on monthly electric bills based on their income level, and FERA gives a 12 percent discount on monthly electric bills to qualified households of three or more. The story also included energy conservation tips.

- **July 5, 2017: Viet Bao Daily News** – “Cool Savings Available to Income Qualified Customers”

SCE’s Energy Savings Assistance Program, which offers customers that meet certain income requirements free energy-saving products and services. “With nearly one-third of our customers eligible, we want to ensure that as many qualified households participate and take advantage of these no-cost programs to help lower their energy bills.” said Mark Wallenrod, SCE director of Program Operations.

- **June 20, 2017: KTIP AM** – “Gardner Discusses Summer SCE Bill Assistance Programs”

Gardner explains the ways that SCE helps its customers manage their electric bills through energy-efficiency income-eligible programs as temperatures climb. “I always want to make sure that nearly one-third of our customers who are eligible for these programs are aware of them and know how they can participate.”

- **June 19, 2017: KTIP AM** – “Gardner Discusses Summer Savings, Conservation”

Gardner explains the ways that SCE helps its customers manage their electric bills through energy-efficiency income-eligible programs as

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temperatures climb. “I always want to make sure that nearly one-third of our customers who are eligible for these programs are aware of them and know how they can participate.”

- **June 12, 2017: La Prensa Colombiana** – “SCE Bill Assistance Program Helps Customers”

Covers SCE’s ESAP program and quotes Mark Wallenrod, SCE director of Program Operations saying that one-third of customers are eligible for these no-cost programs that will help lower energy bills

- **June 4, 2017: KCEL-FM** – “Villegas Discusses Energy Savings Assistance Program”

SCE’s Robert Villegas elaborates on how customers that meet certain income requirements could be eligible for free energy-saving products and services through SCE’s Energy Savings Assistance Program.

- **June 4, 2017: KUTY-AM-** “Villegas Discusses Energy Savings Assistance Program”

SCE’s Robert Villegas elaborates on how customers that meet certain income requirements could be eligible for free energy-saving products and services through SCE’s Energy Savings Assistance Program.

- **June 1, 2017: Viet Bao Daily News** – “Bill Assistance Program Helps Customers in Need”

Posted from the "Bill Assistance Program Helps Customers in Need" Inside Edison story.

- **May 26, 2017: New Santa Ana** –“SCE Program Offers New Energy-Saving Appliances to Qualified Customers”

Customers can “qualify for a free replacement energy-efficient refrigerator, lighting, cooling system or various energy conservation services” to “save money on your Southern California Edison electricity bill” because of the Energy Savings Assistance Program.

- **May 23, 2017: San Bernardino American News** – “SCE Energy Savings Assistance Programs Help Customers in Need” (link no longer live)

Covers SCE’s ESAP program and quotes Mark Wallenrod, SCE director of Program Operations saying that one-third of customers are eligible for these no-cost programs that will help lower energy bills.

2.5.1.12 Social Media (Advertising)

In 2017, social media was utilized to launch three IQP campaigns that promoted the CARE, FERA, ESAP, and the Energy Assistance Fund (EAF) programs, including the Bill Help options for customers.

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Customers were made aware of the income-qualified programs through carousel ads on Facebook and Instagram, which directed customers to the Bill Help options on our website.

The ads were in English and Spanish and were launched in November 2017. The combined efforts generated 1,237,149 impressions across Facebook and Instagram on mobile and desktop devices.

The target ads below were launched to the following three audiences:

- **General Market + Low Income:** All users in our service territory who were identified by Facebook's targeting as making an annual income of \$30-40k. The general market low-income IQP Facebook carousel ad delivered 322,333 impressions and generated a 2.04% click-through rate.
- **Hispanic (excluding low-income):** We targeted all users in our service territory who speak Spanish. The Hispanic (excluding low-income) Income Qualified Program (IQP) Facebook carousel ad was the top performing post. This post garnered 801,332 impressions and reached a 2.88% click-through rate. The strong performance can be attributed to the large audience scale which allowed Facebook to best optimize for audience delivery.
- **Hispanic + Low Income Audience:** We targeted all users who were identified as Spanish speakers and Hispanic by Facebook's targeting and who made an annual household income of \$30–40k. The Hispanic low-income Facebook carousel ad delivered 113,484 impressions and generated a 2.19% click-through rate.

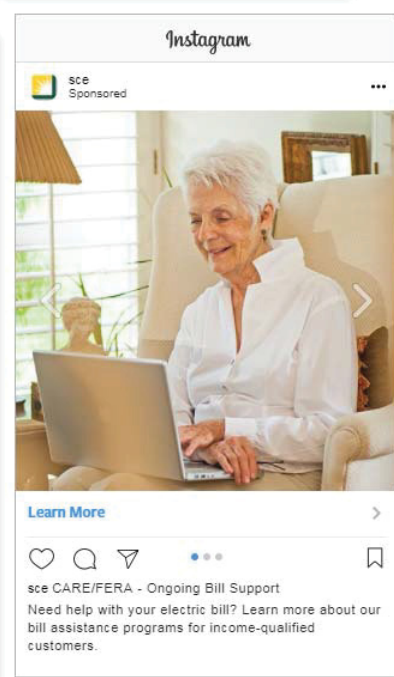
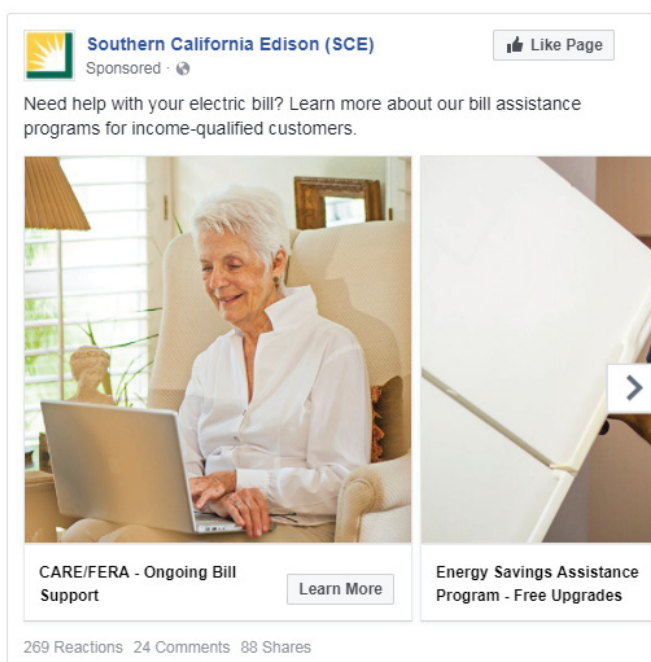
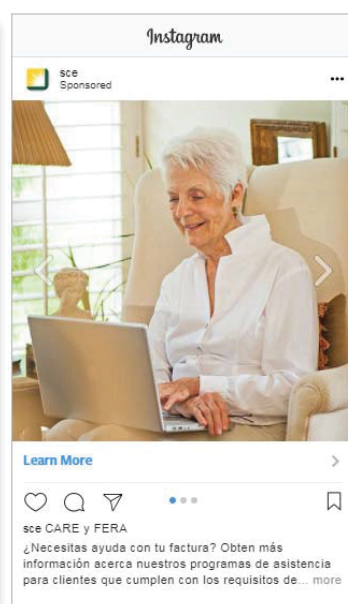
The performance for all three ads exceeded our 2017 click-through rate benchmark of 1.43%. The strong performance for the two Spanish ads can also be attributed to their high Facebook relevancy scores of 7/10 and 8/10, which meant that the content (text/image) resonated with the targeted audience. We strive to earn at least 7/10 for relevancy scores.

2.5.1.13 Income-Qualified Program efforts around ESA and Bill Help:

For Facebook and Instagram (English and Spanish), we spent a total of \$16,498.78 and received a total of 1,237,149 impressions, including 914,816 impressions for Spanish-language users. The social media advertising effort generated a total of 30,432 website clicks.

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2.5.1.14 English and Spanish Ads for Facebook and Instagram:



2.5.1.15 Discuss outreach to CARE customers for the Home Energy Report, including percentage participation.

SCE uses a Randomized Control Trial experimental designed to select customers who will receive a Home Energy Report (HER). In 2017 there were 228,286 CARE customers who received HERs. 18.7% of CARE population received HERs, exceeding the 2017 CPUC mandate of 10%.

2.5.2 *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 (4) most effective outreach methods in 2017 were:

1. General enrollment efforts, which generated 43% 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 27% of all enrollments.
3. Collateral materials, distributed at community outreach events, directing customers to SCE's website for additional program information, including how to enroll online.
4. Strategic page placement of assistance program information and direct links on the SCE.com website appeal to customers using the Internet:
 - Customer enrolling via Internet generated 18% of all enrollments, and
 - Internal and external data sharing efforts generated 13% of enrollments.

2.5.3 *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. Significant outreach efforts in 2017 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 2017 program year at 83.9% penetration and will continue to vigorously market the program in attempting to achieve the 90% penetration rate goal.

2.5.4 *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 SoCalGas, Southwest Gas, PG&E, and local water utilities, as directed in D.11-05-020, to share CARE participant data electronically in order to help customers enroll in each utility's program. In 2017, approximately 39,500 customers were enrolled in SCE's CARE rate through data sharing with these utilities.

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

Contractors who perform ESA Program assessment services assist customers in completing a CARE application, if the customer is qualified. Through this effort 3,787 customers enrolled in CARE during 2017. The CARE Program continually integrates its efforts and messaging with the ESA Program at all outreach events, communications, and marketing campaigns. SCE also enrolled 839 new CARE customers through the (EAF program; which provides utility bill payment assistance to customers through voluntary customer, employee, and shareholder donations.

2.5.6 *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 2017, SCE partnered with food banks, clothing distribution centers, employment workshops, farmers' markets, faith-based and community-based publications, school events and community fairs to coordinate the CARE Program with their related services.

Each quarter, LIHEAP payment recipients were automatically enrolled in CARE, which generated 2,402 enrollments in 2017.

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

To pave the way for the technology which will allow customers to view their end-use and electric usage profiles, SCE mobile optimized its IQP pages:

- ESA Program application page and web status inquiry page (\$126,360).
- CARE Program enrollment and recertification page and post enrollment verification upload page (\$586,203.75).

SCE is also currently mobile optimizing the usage presentment page available to My Account users in SCE.com. The 2017 cost associated to this effort is \$546,203.75. This is scheduled to release in 2018.

2.5.7 *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 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 LIHEAP agency for payment assistance.

2.5.8 *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 2017, SCE continued to leverage advanced data analytics to help increase customer response rate and ultimately enrollment rate. Analysis was done based on customer enrollments from previous marketing efforts. Factors such as geographic location, income, etc. of new CARE households were used to model prospective households for subsequent marketing efforts.

Cost-effectiveness of various outreach and enrollment strategies is described in Section 1.4, Energy Savings Assistance Program Customer Enrollment, above.

2.6 Processing CARE Applications

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

SCE communicates directly with enrolled sub-metered 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.

Sub-metered 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 before removing them from the rate.

2.6.2 *Describe any contracts the utility has with third parties to conduct certification, re-certification 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 (that is, private, CBO, WMDVBE, or LIHEAP contractor).

Under this program, SCE pays a capitation fee to these entities for each new customer they help to enroll in SCE's CARE Program. The capitation fee is to reimburse the entities for the incremental amount associated with helping customers complete 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 through ESA contractors. The project was intended to provide valuable outreach services for the CARE Program by helping clients fill 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.

SCE can make a comparison of outreach cost per enrollment. Table 2.6.2-A, below, shows that SCE's cost per enrollment is about 37 percent of the cost per enrollment for the Capitation Fee program.

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Table 2.6.2-A. Comparison of Cost per Enrollment (SCE vs. Third Parties) -

	Enrolled	Outreach Cost	Cost per Enrollment
SCE ^[1]	285,331	\$2,078,229	\$7.28
Capitation Fee Project ^[2]	2,554	\$50,225	\$19.67
^[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. Table 2.6.2-B, below, compares the approval percentages among SCE enrollment activities and the third-party Capitation Fee program / ESA contractors.

Table 2.6.2-B. Comparison of Enrollment Effectiveness between SCE and Third Parties

Enrollment Activity	Received	Approved	Percent
SCE			
SCE Call Center Requests	86,177	78,570	91%
SCE Direct Mail	76,359	51,130	67%
Special Projects/Events	5,733	4,193	73%
Internet Enrolments	52,726	52,389	99%
PG&E Data Exchange	-	-	-
SWG Data Exchange	236	172	73%
SoCalGas Data Exchange	31,117	30,373	98%
Water Utilities Data Exchange	7	7	100%
DCSD Automatic Enrollment	91,320	68,497	75%
Other Miscellaneous Sources	-	-	-
Third Parties			
Capitation Fee Project	2,502	2,390	96%
ESA Contractors	3,787	3,787	100%

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2.7 Program Management

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

In 2017, there were no significant issues and/or events that impacted program management.

2.8 Pilots

In 2017, there were no significant issues and/or events that impacted pilots.

2.9 Studies

In 2017, there were no significant issues and/or events that impacted studies.

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.*

Table 3.1.1. CARE Expansion Program — Participating Facilities by Month

2017	CARE Residential Facilities	CARE Commercial Facilities	Total
January	434	174	608
February	420	177	597
March	438	182	620
April	463	180	643
May	459	173	632
June	420	164	584
July	372	158	430
August	374	155	529
September	359	152	511
October	365	151	516
November	365	156	521
December	355	155	510

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3.1.1.1 Total Number of Residents

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

Table 3.1.1.1. Numbers of Residents

Facility Type	Established in 2017		Recertified in 2017		Closed in 2017	
	Service Accounts	No. of Beds	Service Accounts	No. of Beds	Service Accounts	No. of Beds
Residential	69	2,149	117	2,760	141	1,997
Commercial	19	1,187	86	4,121	38	2,406
TOTAL	88	3,336	203	6,881	179	4,403

3.2 Usage Information

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

Commodity	Residential	Commercial
Gas	N/A	N/A
Electric	947	11,549

Table 3.2.1. CARE Expansion Program: Average Monthly Gas / Electric Usage

Customer	Gas Therms	Electric KWh
Residential Facilities	N/A	947
Commercial Facilities	N/A	11,549

3.3 Program Cost

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

3.3.1.1 Discount Information

See Table 2.3.1, CARE Program Summary Costs.

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

Residential Facility Electric Discount: \$718.90

The average annual CARE discount received per residential facility by energy source is \$718.90.

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

Commercial Facility Electric Discount: \$5,622.71

The average annual CARE discount received per commercial facility by energy source is \$5,622.71.

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 promote Income Qualified Programs to community leaders across SCE's service territory. Organizations participating in the CARE Capitation Fee program may help an eligible customer complete a CARE application for the Expansion program.

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

Customers who qualify under the Expansion program live primarily in group living facilities and homeless shelters, which can be residential or commercial customers. SCE partners with nonprofit 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.

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

SCE shares its CARE participant data with SoCalGas, Southwest Gas, PG&E, and local water utilities.

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

The barrier to participation for the CARE Expansion Program tends to emerge from a lack of knowledge about the availability of CARE to the nonprofit community. To help mitigate these issues, SCE's Call Center

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representatives are trained to prescreen and offer the program when speaking with potentially qualified group living facilities and homeless shelters.

3.4.2 *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 CARE Expansion 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.

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 2017, there were no significant issues and/or events that impacted program management in this reporting period.

4. Fund Shifting

4.1 Report ESA Program fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D.10-10-008, 16-11-022, and D.17-12-009.

No ESA fund shifting activity occurred within the rules laid out in D.12-08-044.

4.1.1 Report CARE fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D.10-10-008, D.16-11-022, and D.17-12-009.

SCE was authorized \$1,116,895 for processing, certification, and recertification and the actual spend was \$1,122,436. This resulted in a difference of \$5,541. SCE was authorized \$338,165 for post enrollment verification and the actual spend was \$655,435. This resulted in a difference of \$317,270. SCE attributed the over-expenditure to inefficiencies of transitioning to a new digital archiving and processing system. SCE shifted the \$5,541 from Post Enrollment Verification and the \$317,270 from Processing, Certification & Recertification to IT Programming.

4.1.2 Was there any Energy Savings Assistance Program or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 20.1 of D. 08-11-031 as modified by D.10-10-008, D.16-11-022, and D.17-12-009?

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

5. Commonly Used Acronyms

CARE	California Alternate Rates for Energy
CBO	Community-Based Organization
CFL	Compact Fluorescent Lamp
CPUC	California Public Utilities Commission
CSI	California Solar Initiative
D.	Decision
CSD	California Department of Community Services & Development
DDTP	Deaf and Disabled Telecommunications Program
DRP	Demand Response Program
DSM	Demand Side Management
EE	Energy Efficiency
ESA	Energy Savings Assistance
FERA	Family Electric Rate Assistance
HEAT	Home Energy Assistance Tracking
IHD	In Home Display
IOU	Investor-Owned Utility
kW	Kilowatt
kWh	Kilowatt Hour
LIEE	Low Income Energy Efficiency
LIHEAP	Low Income Home Energy Assistance Program
MOU	Memorandum of Understanding
mW	Megawatt

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mWh	Megawatt Hour
NGAT	Natural Gas Appliance Testing
OP	Ordering Paragraph
PCT	Programmable Communicating Thermostat
PEV	Post Enrollment Verification
PFM	Petition for Modification
PG&E	Pacific Gas & Electric Company
PPP	Public Purpose Program
PY	Program Year
SCE	Southern California Edison
SDG&E	San Diego Gas & Electric Company
SoCalGas	Southern California Gas Company
SSI	Supplemental Security Income
SSD	Supplemental Security Disability
SSP	Social Security Pension
TDD	Telecommunications Device for the Deaf
TRC	Total Resource Cost Test
UC	Utility Costs

6. Appendix: ESA and CARE Program Tables

6.1 ESA Program Tables

Summary Table – ESA Program and CARE Program

ESA Program – Table 1- ESA Overall Program Expenses

ESA Program – Table 1A Expenses Funded from 2009-2016 Unspent Programs Funds

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

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

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

ESA Program – Table 3 – Cost Effectiveness

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

ESA Program – Table 5 – Direct Purchases & Installation Contractors

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

ESA Program – Table 7 – Expenditures by Cost Elements

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

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

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

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

ESA Program – Table 12 – Fund Shifting

ESA Program – Table 13 – Categorical Enrollment

ESA Program – Table 14 – Leveraging & Integration

ESA Program – Table 15 – Lighting

ESA Program – Table 16 – "Add Back" Measures

ESA Program – Table 17 – Expenditures for Pilots and Studies

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

6.2 CARE Program Tables

CARE Program – Table 1 – CARE Overall Program Expenses

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

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

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

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

SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2018

CARE Program – Table 5 – Enrollment by County

CARE Program – Table 6 – Re-certification Results

CARE Program – Table 7 – Capitation Contractors

CARE Program – Table 8 – Participants per Month

CARE Program – Table 9 – Average Monthly Usage & Bill

CARE Program – Table 10 – CARE Surcharge & Revenue

CARE Program – Table 11 – CARE Capitation Applications

CARE Program – Table 12 – CARE Expansion Program

CARE Program – Table 13 – CARE High Usage Verification Results

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

CARE Program – Table 14 – CARE Categorical Enrollment

**Energy Savings Assistance Program
And
California Alternate Rates for Energy Program
Southern California Edison 2017 Summary Highlights**

ESA Program

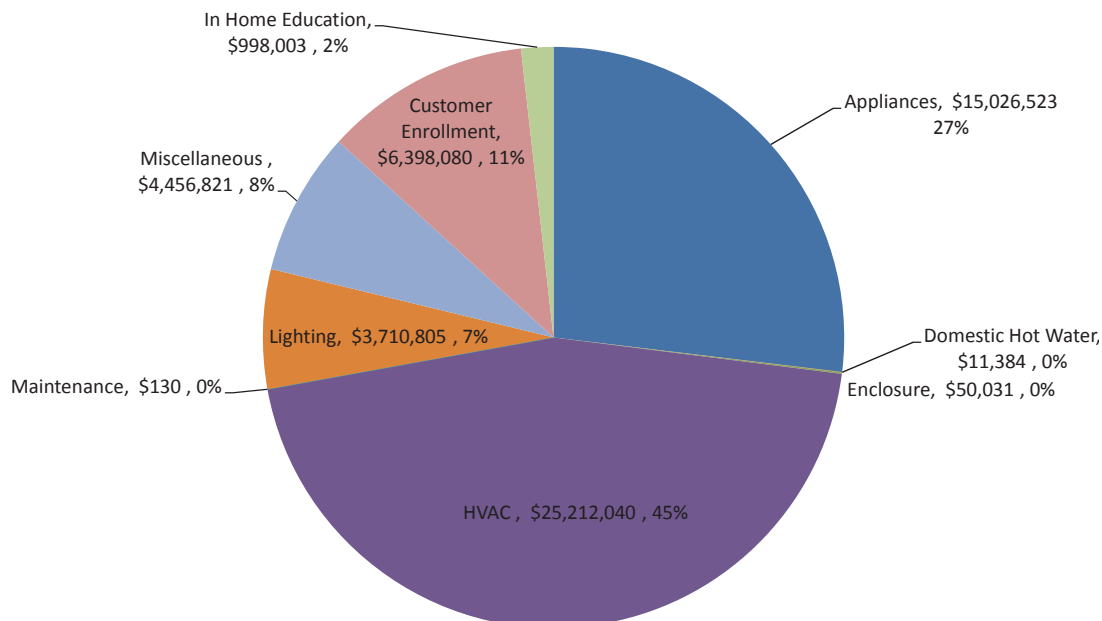
2017 Energy Savings Assistance Program Summary				
2017	Authorized / Planning Assumptions	Actual	%	
Budget	\$59,601,019	\$61,045,978	102%	
Funded from 2009-2016 Unspent Funds	\$11,139,809	\$74,978	1%	
Summary Homes Treated	54,509	80,333	147%	
Summary kWh Saved	30,800,000	31,824,439	103%	
Summary kW Demand Reduced	-	4,852	N/A	
Summary Therms Saved	-	-	N/A	
First Touches Homes Treated	36,522	64,520	177%	
- kWh Saved	-	-	N/A	
- kW Demand Reduced	-	-	N/A	
- Therms Saved	-	-	N/A	
Go-Backs/Retreated Homes	17,987	15,813	88%	
- kWh Saved	-	-	N/A	
- kW Demand Reduced	-	-	N/A	
- Therms Saved	-	-	N/A	

[2] Reflects the funding authorized in D.16-11-022 per year and updated in Commission Resolution E-4885 dated December 14, 2017 which addressed SCE Conforming Advice Letter E-3585-E-A filed on June 20, 2017.

CARE Program

2017 CARE Program Summary			
2017	Authorized Budget	Actual	%
Administrative Expenses	\$9,981,652	\$ 6,706,298	67%
Subsidies	\$457,873,645	\$ 375,043,839	82%
Service Establishment Charge	\$0	\$0	0%
Total Program Costs and Discounts	\$467,855,297	\$381,750,137	82%
2017 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	37,554	171,160	82,794
2017 CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
Total Enrolled	1,457,787	1,222,526	84%

**Southern California Edison - PY 2017
ESA Program Energy Efficiency Expenditures by Measure Group**



	A	B	C	D	E	F	G	H	I	J
1	<p align="center">Southern California Edison - PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 1 ESAP Overall Program Expenses</p>									
2		2017 Authorized Budget ^{1,2}			2017 Annual Expenses			% of Budget Spent		
3	ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
4	Energy Efficiency									
5	Appliances	\$ 19,877,351	\$ -	\$ 19,877,351	\$ 15,026,523	\$ -	\$ 15,026,523	76%		76%
6	Domestic Hot Water	\$ 27,143	\$ -	\$ 27,143	\$ 11,384	\$ -	\$ 11,384	42%	0%	42%
7	Enclosure	\$ 188,160	\$ -	\$ 188,160	\$ 50,031	\$ -	\$ 50,031	27%	0%	27%
8	HVAC	\$ 21,373,954	\$ -	\$ 21,373,954	\$ 25,212,040	\$ -	\$ 25,212,040	118%	0%	118%
9	Maintenance	\$ 91,665	\$ -	\$ 91,665	\$ 130	\$ -	\$ 130	0%	0%	0%
10	Lighting	\$ 2,647,334	\$ -	\$ 2,647,334	\$ 3,710,805	\$ -	\$ 3,710,805	140%	0%	140%
11	Miscellaneous	\$ 2,842,731	\$ -	\$ 2,842,731	\$ 4,456,821	\$ -	\$ 4,456,821	157%	0%	157%
12	Customer Enrollment	\$ 4,071,924	\$ -	\$ 4,071,924	\$ 6,398,080	\$ -	\$ 6,398,080	157%	0%	157%
13	In Home Education	\$ 1,322,070	\$ -	\$ 1,322,070	\$ 998,003	\$ -	\$ 998,003	75%	0%	75%
14	Pilot	\$ -	\$ -	\$ -		\$ -	\$ -	0%	0%	0%
15										
16	Energy Efficiency TOTAL	\$ 52,442,332	\$ -	\$ 52,442,332	\$ 55,863,817	\$ -	\$ 55,863,817	107%	0%	107%
17										
18	Training Center	\$ 493,828	\$ -	\$ 493,828	\$ 107,176	\$ -	\$ 107,176	0%	0%	0%
19	Inspections	\$ 1,051,652	\$ -	\$ 1,051,652	\$ 829,412	\$ -	\$ 829,412	79%	0%	79%
20	Marketing and Outreach	\$ 950,000	\$ -	\$ 950,000	\$ 385,846	\$ -	\$ 385,846	41%	0%	41%
21	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
22	Measurement and Evaluation Studies	\$ 226,250	\$ -	\$ 226,250	\$ 15,189	\$ -	\$ 15,189	7%	0%	7%
23	Regulatory Compliance	\$ 450,856	\$ -	\$ 450,856	\$ 455,011	\$ -	\$ 455,011	101%	0%	101%
24	General Administration	\$ 3,926,101	\$ -	\$ 3,926,101	\$ 3,334,775	\$ -	\$ 3,334,775	85%	0%	85%
25	CPUC Energy Division	\$ 60,000	\$ -	\$ 60,000	\$ 54,752	\$ -	\$ 54,752	91%	0%	91%
26										
27	TOTAL PROGRAM COSTS	\$ 59,601,019	\$ -	\$ 59,601,019	\$ 61,045,978	\$ -	\$ 61,045,978	102%	0%	102%
28	Funded Outside of ESA Program Budget									
29	Indirect Costs				\$ 981,351	\$ -	\$ 981,351			
30	NGAT Costs				\$ -	\$ -	\$ -			
31										
32	[2] Reflects the funding authorized in D.16-11-022 per year and updated in Commission Resolution E-4885 dated December 14, 2017 which addressed SCE Conforming Advice Letter E-3585-E-A filed on June 20, 2017.									

Southern California Edison - PY 2017 Energy Savings Assistance Program Annual Report
ESAP Table 1A
Expenses Funded from 2009-2016 Unspent Program Funds

ESA Program:	2017 Authorized Budget ^{1,2}			2017 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency									
- Central AC and other AC related measures- Wx 13	\$ 2,824,460	\$ -	\$ 2,824,460		\$ -	\$ -	0%	0%	0%
- Power Strip Tier II	\$ 987,546	\$ -	\$ 987,546	\$ 40,668	\$ -	\$ 40,668	4%	0%	4%
- HE Clothes Washer	\$ 1,434,053	\$ -	\$ 1,434,053		\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -		\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -		\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -		\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -		\$ -	\$ -	0%	0%	0%
Multi-Family Common Area Measures	\$ 4,500,000	\$ -	\$ 4,500,000		\$ -	\$ -	0%	0%	0%
In Home Education	\$ -	\$ -	\$ -		\$ -	\$ -	0%	0%	0%
Leveraging - CSD	\$ 1,000,000	\$ -	\$ 1,000,000		\$ -	\$ -	0%	0%	0%
Measurement and Evaluation Studies	\$ -	\$ -	\$ -		\$ -	\$ -	0%	0%	0%
Regulatory Compliance	\$ 393,750	\$ -	\$ 393,750	\$ 34,310	\$ -	\$ 34,310	9%	0%	9%
General Administration	\$ -	\$ -	\$ -		\$ -	\$ -	0%	0%	0%
TOTAL UNSPENT PROGRAM COSTS[1]	\$ 11,139,809	\$ -	\$ 11,139,809	\$ 74,978	\$ -	\$ 74,978	1%	0%	1%

[1] D.16-11-022 specifically directed funding for new initiatives to come from unspent 2009-2016 ESA Program funds.

[2] Reflects the funding authorized in D.16-11-022 per year and updated in Commission Resolution E-4885 dated December 14, 2017 which addressed SCE Conforming Advice Letter E-3585-E-A filed on June 20, 2017.

Southern California Edison - PY 2017 Energy Savings Assistance Program Annual Report

ESAP Table 2

ESAP Expenses and Energy Savings by Measures Installed

	ESA Program (Summary)Total							ESA Program (First Touch Homes Treated)							ESA Program (Re-Treated Homes/Go Backs)							ESA Program (Aliso Canyon - SCG & SCE) [6]						
	Units	Year-To-Date Completed & Expensed Installation						Units	Year-To-Date Completed & Expensed Installation						Units	Year-To-Date Completed & Expensed Installation						Units	Year-To-Date Completed & Expensed Installation					
		Quantity Installed (K+S)	kWh [4] (Annual) (L+T)	kW [4] (Annual) (M+U)	Therms [4] (Annual) (N+V)	Expenses (\$) (O+W)	% of Expenditure		Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses (\$)	% of Expenditure		Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses (\$)	% of Expenditure		Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses (\$)	% of Expenditure
Measures																												
Appliances																												
High Efficiency Clothes Washer	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Refrigerators	Each	14,953	11,573,472	1,395	-	\$ 15,330,553	27.3%	Each	12,196	9,439,582	1,138	-	\$ 12,491,674	22.3%	Each	2,757	2,133,890	257	-	\$ 2,836,687	5.1%	Each	12,637	9,780,912	1,179	-	\$ 12,923,966	23.0%
Microwaves [5]	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water																												
Water Heater Blanket	Home	13	1,124	0	-	\$ 644	0.0%	Home	13	1,124	0	-	\$ 644	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	13	1,124	0	-	\$ 644	0.0%
Low Flow Shower Head	Home	230	25,152	3	-	\$ 7,163	0.0%	Home	202	22,201	3	-	\$ 6,203	0.0%	Home	28	2,951	0	-	\$ 960	0.0%	Home	199	21,373	3	-	\$ 6,139	0.0%
Water Heater Pipe Insulation	Home	64	5,460	1	-	\$ 1,264	0.0%	Home	59	5,034	1	-	\$ 1,165	0.0%	Home	5	426	0	-	\$ 99	0.0%	Home	47	4,010	0	-	\$ 928	0.0%
Faucet Aerator	Home	224	35,948	4	-	\$ 2,313	0.0%	Home	206	33,248	4	-	\$ 2,123	0.0%	Home	18	2,700	0	-	\$ 190	0.0%	Home	175	27,520	3	-	\$ 1,753	0.0%
Water Heater Repair/Replacement	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Thermostatic Shower Valve	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - Combined Showerhead(TSV)	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - Tub Diverter/ Tub Spout	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Enclosure																												
Air Sealing / Envelope [1]	Home	506	83,741	23	-	\$ 48,675	0.1%	Home	455	74,097	20	-	\$ 43,084	0.1%	Home	51	9,644	3	-	\$ 5,591	0.0%	Home	433	71,411	21	-	\$ 41,034	0.1%
Attic Insulation	Home	1	-	-	-	\$ 1,356	0.0%	Home	1	-	-	-	\$ 1,356	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	1	-	-	-	\$ 1,356	0.0%
HVAC																												
FAU Standing Pilot Conversion	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Furnace Repair/Replacement	Each	1	-	-	-	\$ -	0.0%	Each	1	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	1	-	-	-	\$ -	0.0%
Room A/C Replacement	Each	879	64,107	10	-	\$ 727,482	1.3%	Each	712	51,713	8	-	\$ 590,836	1.1%	Each	167	12,395	2	-	\$ 136,646	0.2%	Each	439	37,448	6	-	\$ 355,372	0.6%
Central A/C replacement	Each	3,100	610,850	94	-	\$ 11,899,971	21.2%	Each	2,757	540,515	83	-	\$ 10,582,019	18.9%	Each	343	70,335	11	-	\$ 1,317,952	2.3%	Each	2,466	521,904	80	-	\$ 9,449,199	16.8%
Heat Pump Replacement	Each	288	203,934	93	-	\$ 1,082,514	1.9%	Each	272	192,901	88	-	\$ 1,014,300	1.8%	Each	16	11,033	5	-	\$ 68,214	0.1%	Each	228	158,403	72	-	\$ 890,104	1.6%
Evaporative Cooler (Installation)	Each	10,984	5,325,998	822	-	\$ 10,959,099	19.5%	Each	9,502	4,621,190	713	-	\$ 9,478,161	16.9%	Each	1,482	704,808	109	-	\$ 1,480,939	2.6%	Each	7,821	3,748,671	578	-	\$ 7,821,178	13.9%
Duct Testing and Sealing	Home	3,058	101,237	16	-	\$ 696,250	1.2%	Home	2,789	92,849	15	-	\$ 633,100	1.1%	Home	269	8,387	1	-	\$ 63,150	0.1%	Home	2,431	88,731	14	-	\$ 556,000	1.0%
New - Energy Efficient Fan Control	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
New - Prescriptive Duct Sealing	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
New - A/C Time Delay	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Maintenance																												
Furnace Clean and Tune	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Central A/C Tune up	Home	1	204	0	-	\$ 130	0.0%	Home	1	204	0	-	\$ 130	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Lighting																												
Compact Fluorescent Lights (CFL)	Each	237,659	3,959,404	503	-	\$ 1,691,005	3.0%	Each	187,812	3,128,952	398	-	\$ 1,335,852	2.4%	Each	49,847	830,452	105	-	\$ 355,153	0.6%	Each	215,620	3,596,904	457	-	\$ 1,532,809	2.7%
Interior Hard wired CFL fixtures	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Exterior Hard wired CFL fixtures	Each	1,791	62,615	8	-	\$ 160,190	0.3%	Each	1,412	49,350	6	-	\$ 126,400	0.2%	Each	379	13,265	2	-	\$ 33,790	0.1%	Each	1,202	42,000	5	-	\$ 107,525	0.2%
Torchiere	Each	3,899	351,965	45	-	\$ 239,731	0.4%	Each	3,494	315,406	40	-	\$ 214,783	0.4%	Each	405	36,560	5	-	\$ 24,947	0.0%	Each	3,324	290,496	37	-	\$ 198,210	0.4%
Torchiere - LED	Each	7,235	278,076	29	-	\$ 463,640	0.8%	Each	5,578	214,477	23	-	\$ 357,542	0.6%	Each	1,657	63,598	7	-	\$ 106,098	0.2%	Each	6,617	253,073	27	-	\$ 423,960	0.8%
Occupancy Sensor	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
LED Night Lights	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - LED Reflector Bulb	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - LED A-Lamps	Each	107,634	4,208,229	457	-	\$ 969,190	1.7%	Each	85,302	3,334,968	362	-	\$ 765,669	1.4%	Each	22,332	873,261	95	-	\$ 203,521	0.4%	Each	99,158	3,863,786	419	-	\$ 889,369	1.6%
Miscellaneous																												
Pool Pumps	Each	2,179	3,799,036	1,194	-	\$ 2,670,367	4.8%	Each	1,848	3,222,020	1,013	-	\$ 2,271,270	4.0%	Each	331	577,015	181	-	\$ 399,098	0.7%	Each	1,828	3,187,564	1,002	-	\$ 2,234,455	4.0%
Smart Power Strips - Tier 1	Each	42,811	1,040,156	141	-	\$ 1,712,816	3.1%																					

	A	B	C	D	E	F	G	H	I	J
1	Southern California Edison - PY 2017 Energy Savings Assistance Program Annual Report									
2	ESAP Table 2A									
3	ESAP Expenses and Energy Savings by Measures Installed									
4	Results for this table were not provided as SCE has not yet begun CSD leveraging efforts for the ESA Program.									
5										
6				ESA Program - CSD Leveraging						
7				Year-To-Date Completed & Expensed Installation						
8	Measures	Units	Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses (\$)	% of Expenditure		
9	Appliances									
10	High Efficiency Clothes Washer	Each								
11	Refrigerators	Each								
12	Microwaves [5]	Each								
13	Domestic Hot Water									
14	Water Heater Blanket	Home								
15	Low Flow Shower Head	Home								
16	Water Heater Pipe Insulation	Home								
17	Faucet Aerator	Home								
18	Water Heater Repair/Replacement	Each								
19	Thermostatic Shower Valve	Each								
20	New - Combined Showerhead/TSV	Each								
21	New - Heat Pump Water Heater	Each								
22	New - Tub Diverter/ Tub Spout	Each								
23	New - Thermostat-controlled Shower Valve	Each								
24	Enclosure									
25	Air Sealing / Envelope [1]	Home								
26	Caulking	Home								
27	Attic Insulation	Home								
28	HVAC									
29	FAU Standing Pilot Conversion	Each								
30	Furnace Repair/Replacement	Each								
31	Room A/C Replacement	Each								
32	Central A/C replacement	Each								
33	Heat Pump Replacement	Each								
34	Evaporative Cooler (Replacement)	Each								
35	Evaporative Cooler (Installation)	Each								
36	Duct Testing and Sealing	Home								
37	New - Energy Efficient Fan Control	Home								
38	New - Prescriptive Duct Sealing	Home								
39	New - High Efficiency Forced Air Unit (HE FAU)	Home								
40	New - A/C Time Delay	Home								
41	Maintenance									
42	Furnace Clean and Tune	Home								
43	Central A/C Tune up	Home								
44	Lighting									
45	Compact Fluorescent Lights (CFL)	Each								
46	Interior Hard wired CFL fixtures	Each								
47	Exterior Hard wired CFL fixtures	Each								
48	Torchiere	Each								
49	Occupancy Sensor	Each								
50	LED Night Lights	Each								
51	New - LED Diffuse Bulb (60W Replacement)	Each								
52	New - LED Reflector Bulb	Each								
53	New - LED Reflector Downlight Retrofit Kits	Each								
54	New - LED A-Lamps	Each								
55	Miscellaneous									
56	Pool Pumps	Each								
57	Smart Power Strips - Tier 1	Each								
58	New - Smart Power Strips - Tier 2	Each								
59	Pilots									
60										
61	Customer Enrollment									
62	Outreach & Assessment	Home					\$ -			
63	In-Home Education	Home					\$ -			
64										
65	Total Savings/Expenditures				-	-	-	\$ -		
66										
67	Total Households Weatherized [2]									
68										
69	Households Treated		CSD MF Buildings Treated			Total				
70	- Single Family Households Treated	Home								
71	- Multi-family Households Treated	Home	- Multifamily							
72	- Mobile Homes Treated	Home								
73	Total Number of Households Treated		Home							
74	# Eligible Households to be Treated for PY [3]		Home							
75	% of Households Treated		%							
76	- Master-Meter Households Treated		Home							
77										
78	[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic									
79	minor home repairs. Minor home repairs predominantly are door									
80	[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.									
81	[3] Based on OP 79 of D.16-11-022.									
82	[4] All savings are calculated based on the following sources:									
83	Evergreen Economics "Impact Evaluation of the 2011 CA Lo									
84	[5] Microwave savings are from ECONorthWest Studies									
85										
86	Results for this table were not provided as SCE has not yet begun CSD leveraging efforts for the ESA Program.									

Southern California Edison - PY 2017 Energy Savings Assistance Program Annual Report

ESAP Table 2B

ESAP Expenses and Energy Savings by Measures Installed

Results for this table were not provided as SCE has not yet begun installing measures in multifamily building common areas.

ESA Program - Multifamily Common Area [8]							
Measures	Units	Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses (\$)	% of Expenditure
Appliances							
High Efficiency Clothes Washer	Each						
Refrigerators	Each						
Microwaves [5]	Each						
Domestic Hot Water							
Water Heater Blanket	Home						
Low Flow Shower Head	Home						
Water Heater Pipe Insulation	Home						
Faucet Aerator	Home						
Water Heater Repair/Replacement	Each						
Thermostatic Shower Valve	Each						
New - Combined Showerhead/TSV	Each						
New - Heat Pump Water Heater	Each						
New - Tub Diverter/ Tub Spout	Each						
New - Thermostat-controlled Shower Valve	Each						
Enclosure							
Air Sealing / Envelope [1]	Home						
Caulking	Home						
Attic Insulation	Home						
HVAC							
FAU Standing Pilot Conversion	Each						
Furnace Repair/Replacement	Each						
Room A/C Replacement	Each						
Central A/C replacement	Each						
Heat Pump Replacement	Each						
Evaporative Cooler (Replacement)	Each						
Evaporative Cooler (Installation)	Each						
Duct Testing and Sealing	Home						
New - Energy Efficient Fan Control	Home						
New - Prescriptive Duct Sealing	Home						
New - High Efficiency Forced Air Unit (HE FAU)	Home						
New - A/C Time Delay	Home						
Maintenance							
Furnace Clean and Tune	Home						
Central A/C Tune up	Home						
Lighting							
Compact Fluorescent Lights (CFL)	Each						
Interior Hard wired CFL fixtures	Each						
Exterior Hard wired CFL fixtures	Each						
Torchiere	Each						
Occupancy Sensor	Each						
LED Night Lights	Each						
New - LED Diffuse Bulb (60W Replacement)	Each						
New - LED Reflector Bulb	Each						
New - LED Reflector Downlight Retrofit Kits	Each						
New - LED A-Lamps	Each						
Miscellaneous							
Pool Pumps	Each						
Smart Power Strips - Tier 1	Each						
New - Smart Power Strips - Tier 2	Each						
Ancillary Services							
Commissioning [7]	Home						
Audit	Home						
Administration [6]	Home						
Pilots							
Customer Enrollment							
Outreach & Assessment	Home					\$ -	
In-Home Education	Home					\$ -	
Total Savings/Expenditures			-	-	-	\$ -	
Total Multifamily Buildings Weatherized [2]							
Multifamily Buildings Treated	Total						
- Multifamily							

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.

[3] Based on OP 79 of D.16-11-022.

[4] All savings are calculated based on the following sources:

[5] Microwave savings are from ECONorthWest Studies received in December of 2011

Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013

[6] Per D.16-11-022 at p.210, the CPUC imposes a cap of 10% of ESA Program funds for administrative activities and a ceiling of

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

[8] Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are

Note: The applicable MF common area measures will need to be reflected in the appropriate subsections above.

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ESAP Table 4

Detail by Housing Type and Source¹

		2017 Energy Savings ¹				2017 Expenses
Customer	Housing Type	# Homes Treated	(mWh)	MW	(mTherm)	
Gas and Electric Customers						
Owners - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Renters - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Electric Customers (only)						
Owners - Total		38,761	17,503,932	\$ 2,966	-	\$ 37,105,363
	Single Family	32,504	14,871,347	\$ 2,584		\$ 31,227,803
	Multi Family	590	267,757	\$ 63		\$ 764,036
	Mobile Homes	5,667	2,364,828	\$ 319		\$ 5,113,524
Renters - Total		41,572	14,320,506	\$ 1,887	-	\$ 24,212,211
	Single Family	20,532	8,281,539	\$ 1,133		\$ 14,608,803
	Multi Family	20,055	5,588,774	\$ 695		\$ 8,788,630
	Mobile Homes	985	450,193	\$ 59		\$ 814,777
Gas Customers (only)						
Owners - Total		-				
	Single Family	-				
	Multi Family	-				
	Mobile Homes	-				
Renters - Total		-				
	Single Family	-				
	Multi Family	-				
	Mobile Homes	-				
Gas and Electric Total						
Multifamily Common Area Bldgs - Total						
Totals:		80,333	31,824,439	\$ 4,852	-	61,317,574

Penetration History

Year	Homes Treated ²	Ineligible & Unwilling ³	Estimated Eligible in Current Year ⁴	Current Year Penetration Rate for Homes Treated
2002	29,685			
2003	33,348			
2004	38,996			
2005	36,420			
2006	53,017			
2007	44,323			
2008	54,635			
2009	61,834	22,109	83,445	74%
2010	121,016	41,110	83,445	145%
2011	93,771	25,067	83,446	112%
2012	49,026	19,833	87,389	56%
2013	69,031	37,449	87,389	79%
2014	76,983	40,596	87,389	88%
2015	54,127	57,193	87,389	62%
2016	41,070	57,303	87,389	47%
2017	64,520	50,166	80,531	80%
2018				
2019				
2020				
Total Homes Treated since 2002	921,802	350,826	767,812	

¹ Summary data which includes ESA Program, CSD Leveraging, and MF efforts.

² Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative. It includes first touches, and CSD leveraging authorized in D.16-11-022 and D.17-12-009. It does not include go-backs/retreatments.

³ Ineligible & Unwilling defined in ESA Table 8.

⁴ For years prior to 2017, this value is based on Attachment F of D.12-08-044, D.14-08-030. For 2017, this value is based on the calculation of remaining eligible households as described in Table VIII-1, Row 6, of SCE's Conforming Advice Letter filed April 3, 2017, and as ordered in Ordering Paragraph 80 of D.17-12-009

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2017	PG&E	5,760	8
2017	SDG&E	0	0
2017	SoCalGas	1,228,572	30,240

	A	B	C	D	E	F	G
	Southern California Edison - PY 2017 Energy Savings Assistance Program Annual Report						
	ESAP Table 5						
1	ESAP Direct Purchases & Installation Contractors [1]						
2	Contractor	County	Contractor Type (Check one or more if applicable)				2017 Annual Expenditures
3			Private	CBO	WMDVBE	LIHEAP	
4	American Electric Supply, Inc. ^[2]	All	x				\$ 716,467
5	American Insulation, Inc.	14	x		x		\$ 97,067
6	Assert, Inc.	4		x			\$ 608,800
7	Autocell Electronics, Inc. ^[2]	All	x		x		\$ 1,442,718
8	Community Action Partnership of San Bernardino County	9,11		x	x	x	\$ 25,945
9	Community Action of Ventura County	8		x		x	\$ 228
10	Energy Efficiency Resources, Inc. ^[2]	All	x		x		\$ 17,145,953
11	Energy Save ^[3]	4,6,7,8,11	x		x		\$ 2,147,009
12	Environmental Assessment Services& Education of California	6,7,11	x		x		\$ 216,895
13	FCI Management Consultants	4	x		x		\$ 51,449
14	Ferguson Enterprises ^[2]	All	x				\$ 3,048,628
15	Gary's Pool Supplies ^[2]	All	x				\$ 1,835,243
16	Home Energy Assistance Living, Inc.	4, 6	x		x		\$ 983,348
17	Inter City Energy Systems, Inc.	14	x		x		\$ 992,980
18	Inyo Mono Advocates for Community Action	1,5		x		x	\$ -
19	John Harrison Contracting, Inc.	7,8	x		x		\$ 6,342,276
20	Long Beach Community Services Development Corp.	4		x	x	x	\$ 46,825
21	Maravilla Foundation	2,4,6,10,11		x	x	x	\$ 2,928,519
22	Pacific Asian Consortium in Employment	4,9,11		x	x	x	\$ 52,125
23	Peace Officers for Green Environment	6,7,8	x		x		\$ 2,825,533
24	Proteus, Inc.	1,2,3,4,5,8,9,10,11		x			\$ 2,845,821
25	Quality Conservation Services, Inc.	4,8	x				\$ 419,402
26	Reliable Energy Management, Inc.	4,8	x		x		\$ 1,752,599
27	Richard Heath and Associates, Inc. ^[3]	All	x		x		\$ 321,837
28	Saving Energy Consulting Services, Inc.	6,7	x		x		\$ 700,971
29	SEARS Commercial ^[2]	All	x				\$ 7,461
30	Silicon Valley Foundation	14	x		x		\$ 190,273
31	Synergy Companies	14	x				\$ 316,512
32	Tri-State Home Improvements, Inc.	4,7,8	x		x		\$ 6,499,121
33	Veterans in Community Services, Inc.	14		x	x		\$ 79,540
34	Village Solutions Foundation	4,6		x			\$ 60,202
35	Total Contractor Expenditures						\$ 54,701,744
36							
37							
38							

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Southern California Edison - PY 2017 Energy Savings Assistance Program Annual Report																		
	ESAP Table 6																		
1	ESAP Installation Cost of Program Installation Contractors [1]																		
2		Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2017 Program Total				
3			Installations		Dwellings		Costs		Installations		Dwellings		Costs						
4			Units	%	Units	%	\$	%	Units	%	Units	%	\$	%	Units Installed	Households	Costs	Cost/ Unit	Cost/ Household
5	Dwellings	Each	545,531	92%	81,099	92%	\$ 55,129,230	98%	47,805	8%	7,467	8%	\$ 971,873	2%	593,336	88,566	\$ 56,101,103	\$ 94.55	\$ 633.44
6	Appliances																		
7	High Efficiency Clothes Washer	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
8	Refrigerators	Each	14,953	100%	14,953	100%	\$ 15,330,553	100%		0%		0%		0%	14,953	14,953	\$ 15,330,553	\$ 1,025	\$ 1,025
9	Microwaves	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
10	Domestic Hot Water																		
11	Water Heater Blanket	Home	13	100%	13	100%	\$ 644	100%		0%		0%		0%	13	13	\$ 644	\$ 50	\$ 50
12	Low Flow Shower Head	Home	230	100%	230	100%	\$ 7,163	100%		0%		0%		0%	230	230	\$ 7,163	\$ 31	\$ 31
13	Water Heater Pipe Insulation	Home	64	100%	64	100%	\$ 1,264	100%		0%		0%		0%	64	64	\$ 1,264	\$ 20	\$ 20
14	Faucet Aerator	Home	224	100%	224	100%	\$ 2,313	100%		0%		0%		0%	224	224	\$ 2,313	\$ 10	\$ 10
15	Water Heater Repair/Replacement	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
16	Thermostatic Shower Valve	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
17	New - Combined Showerhead/TSV	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
18	New - Heat Pump Water Heater	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
19	New - Tub Diverter/ Tub Spout	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
20	New - Thermostat-controlled Shower Valve	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
21	Enclosure																		
22	Air Sealing / Envelope	Home	504	100%	504	100%	\$ 48,570	100%	2	0%	2	0%	\$ 105	0%	506	506	\$ 48,675	\$ 96	\$ 96
23	Attic Insulation	Home	1	100%	1	100%	\$ 1,356	100%		0%		0%		0%	1	1	\$ 1,356	\$ 1,356	\$ 1,356
24	HVAC																		
25	FAU Standing Pilot Light Conversion	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
26	Furnace Repair/Replacement	Each	1	100%	1	1%		0%		0%		0%		0%	1	1	\$ -	\$ -	\$ -
27	Room A/C Replacement	Each	879	100%	630	100%	\$ 727,482	100%		0%		0%		0%	879	630	\$ 727,482	\$ 828	\$ 1,155
28	Central A/C Replacement	Each	3,100	100%	2,935	100%	\$ 11,899,971	100%		0%		0%		0%	3,100	2,935	\$ 11,899,971	\$ 3,839	\$ 4,055
29	Heat Pump Replacement	Each	288	100%	285	100%	\$ 1,082,514	100%		0%		0%		0%	288	285	\$ 1,082,514	\$ 3,759	\$ 3,798
30	Evaporative Coolers (Replacement)	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
31	Evaporative Coolers (Installation)	Each	10,984	100%	10,984	100%	\$ 10,959,099	100%		0%		0%		0%	10,984	10,984	\$ 10,959,099	\$ 998	\$ 998
32	Duct Testing and Sealing	Home	3,058	100%	3,058	100%	\$ 696,250	100%		0%		0%		0%	3,058	3,058	\$ 696,250	\$ 228	\$ 228
33	New - Energy Efficient Fan Control	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
34	New - Prescriptive Duct Sealing	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
35	New - High Efficiency Forced Air Unit (HE FAU)	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
36	New - A/C Time Delay	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
37	Maintenance																		
38	Furnace Clean and Tune	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
39	Central A/C Tune-up	Home	1	100%	1	100%	\$ 130	100%		0%		0%		0%	1	1	\$ 130	\$ 130	\$ 130
40	Evaporative Cooler Maintenance	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
41	Lighting																		
42	Compact Fluorescent Lights (CFLs)	Each	214,735	90%	41,653	92%	\$ 1,523,993	90%	22,924	10%	3,630	8%	\$ 167,012	10%	237,659	45,283	\$ 1,691,005	\$ 7	\$ 37
43	Interior Hard wired CFL fixtures	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
44	Exterior Hard wired CFL fixtures	Each	1,791	100%	884	100%	\$ 160,190	100%		0%		0%		0%	1,791	884	\$ 160,190	\$ 89	\$ 181
45	Torchiere	Each	3,523	90%	3,015	91%	\$ 216,592	90%	376	10%	310	9%	\$ 23,138	10%	3,899	3,325	\$ 239,731	\$ 61	\$ 72
46	Torchiere - LED	Each	6,727	93%	5,831	94%	\$ 431,178	93%	508	7%	359	6%	\$ 32,462	7%	7,235	6,190	\$ 463,640	\$ 64	\$ 75
47	Occupancy Sensor	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
48	LED Night Lights	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
49	New - LED Diffuse Bulb (60W Replacement)	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
50	New - LED Reflector Bulb	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
51	New - LED Reflector Downlight Retrofit Kits	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
52	New - LED A-Lamps	Each	100,708	94%	17,039	95%	\$ 914,017	94%	6,926	6%	969	5%	\$ 55,173	6%	107,634	18,008	\$ 969,190	\$ 9	\$ 54
53	Miscellaneous																		
54	Pool Pumps	Each	2,179	100%	2,179	100%	\$ 2,670,367	100%		0%		0%		0%	2,179	2,179	\$ 2,670,367	\$ 1,226	\$ 1,226
55	Smart Power Strips	Each	38,589	90%	30,218	91%	\$ 1,540,759	90%	4,222	10%	2,876	9%	\$ 172,057	10%	42,811	33,094	\$ 1,712,816	\$ 40	\$ 52
56	New - Smart Power Strips - Tier 2	Each	693	96%	569	96%	\$ 39,094	96%	28	4%	25	4%	\$ 1,574	4%	721	594	\$ 40,668	\$ 56	\$ 68
57	Ancillary Services																		
58	Commissioning	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
59	Audit	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
60	Administration	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
61	Pilots																		
62		Each		0%						0%					-	-	\$ -	\$ -	\$ -
63		Each		0%						0%					-	-	\$ -	\$ -	\$ -
64	Customer Enrollment																		
65	Outreach & Assessment	Home	81,099	92%	81,099	92%	\$ 5,957,925	93%	7,467	8%	7,467	8%	\$ 440,155	7%	88,566	88,566	\$ 6,398,080	\$ 72	\$ 72
66	In-Home Education	Home	61,187	92%	61,187	92%	\$ 917,805	92%	5,352	8%	5,352	8%	\$ 80,198	8%	66,539	66,539	\$ 998,003	\$ 15	\$ 15
67																			
68	[1] Summary data which includes ESA Program , CSD Leveraging, and MF Common Area efforts.																		
69																			
70	Note: The applicable MF common area measures will need to be reflected in the appropriate subsections above.																		
71																			
72																			

	A	B	C	D	E
1	Southern California Edison Company - PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 7 Expenditures Recorded by Cost Element [1]				
2	ESA Program:	Labor	Non-Labor	Contractor	Total
3	Energy Efficiency				
4	Appliances			\$ 15,026,523	\$ 15,026,523
5	Domestic Hot Water			\$ 11,384	\$ 11,384
6	Enclosure			\$ 50,031	\$ 50,031
7	HVAC			\$ 25,212,040	\$ 25,212,040
8	Maintenance			\$ 130	\$ 130
9	Lighting			\$ 3,751,473	\$ 3,751,473
10	Miscellaneous			\$ 4,456,821	\$ 4,456,821
11	Customer Enrollment			\$ 6,398,080	\$ 6,398,080
12	In Home Education			\$ 998,003	\$ 998,003
13	Pilot			\$ -	\$ -
14					\$ -
15	Energy Efficiency TOTAL	\$ -	\$ -	\$ 55,904,484	\$ 55,904,484
16					
17	Training Center	\$ 92,423	\$ 14,752		\$ 107,176
18	Inspections	\$ 51,401	\$ 5,568	\$ 772,444	\$ 829,412
19	Marketing and Outreach	\$ -	\$ 385,846		\$ 385,846
20	Statewide Marketing Education and Outreach	\$ -			\$ -
21	Measurement and Evaluation Studies	\$ -	\$ 15,189		\$ 15,189
22	Regulatory Compliance	\$ 440,655	\$ 48,666.19		\$ 489,321
23	General Administration	\$ 1,558,677	\$ 1,776,098		\$ 3,334,775
24	CPUC Energy Division	\$ -	\$ 54,752		\$ 54,752
25					
26	TOTAL PROGRAM COSTS	\$ 2,143,156	\$ 2,300,872	\$ 56,676,928	\$ 61,120,955
27					
28					
29	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.				

	A	B	C	D	E	F	G	H	I	J
1	Southern California Edison Company - PY 2017 Energy Savings Assistance Program Annual Report									
	ESAP Table 8									
	ESAP Homes Unwilling / Unable to Participate									
2	Reason Provided									
3	County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible		
4	Inyo	0	3	0	4	0	3	9		
5	Kern	15	13	0	69	16	119	729		
6	Kings	10	19	0	1	5	79	199		
7	Los Angeles	100	104	6	1,506	348	2,626	14,392		
8	Mono	0	0	0	0	0	0	1		
9	Orange	22	31	0	233	75	448	4,356		
10	Riverside	112	154	0	1,135	229	728	4,877		
11	San Bernardino	194	234	2	1,458	236	1,512	9,425		
12	Santa Barbara	1	2	0	2	5	1	38		
13	Tulare	93	107	1	49	21	757	1,871		
14	Ventura	22	24	1	147	31	82	1,074		
15	Total	569	691	10	4,604	966	6,355	36,971		
16										
17										
18	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.									
19										
20	ESAP Coordinated Treatment (SCE and SCG only)									
21		Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency [1]								
22	# of Households Received Measures from one Utility, but not other Utility or Partnering Agency ^[1]	# of Customer Unwilling/Declined Program Measures	# of Customer Unavailable - Scheduling Conflicts	# of Hazardous Environment (unsafe/unclean)	# of Landlord Refused to Authorize Participation	# of Other Infeasible/ Ineligible ^[2]				
23	10,686	455	744	-	606	8,881				
24	Total	455	744	-	606	8,881				
25										
26	[1] Excludes households for which a joint premise could not be found due to address normalization limitations between SCE and SCG.									
27	[2] Includes households for which a joint premise was found, but either 1) no SCE lead exists, 2) a lead exists but a reason preventing enrollment could not be found, 3) a lead exists and was									
28	enrolled, but no measures were provided.									

	A	B	C	D	E	F	G
1	Southern California Edison - PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 9 Life Cycle Bill Savings by Measure [1][3]						
2	Measure Description		2017 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2017 Total Measure Life Cycle Bill Savings
3	Appliances						
4	High Efficiency Clothes Washer	Each	-	-			\$ -
5	Refrigerators	Each	14,953	773.99		14	\$ 16,010,346.65
6	Microwaves [2]	Each	-				\$ -
7	Domestic Hot Water						
8	Water Heater Blanket	Home	13	86.42		7	\$ 908.53
9	Low Flow Shower Head	Home	230	109.35		10	\$ 27,141.51
10	Water Heater Pipe Insulation	Home	64	85.32		11	\$ 6,338.50
11	Faucet Aerator	Home	224	160.48		10	\$ 38,793.00
12	Water Heater Repair/Replacement	Each	-				\$ -
13	Thermostatic Shower Valve	Each	-				\$ -
14	New - Combined Showerhead/TSV	Each	-				\$ -
15	New - Heat Pump Water Heater	Each	-				\$ -
16	New - Tub Diverter/ Tub Spout	Each	-				\$ -
17	New - Thermostat-controlled Shower Valve	Each	-				\$ -
18	Enclosure						
19	Air Sealing / Envelope	Home	506	165.50		11	\$ 97,211.09
20	Attic Insulation	Home	1	-			\$ -
21	HVAC						
22	FAU Standing Pilot Light Conversion	Each	-				\$ -
23	Furnace Repair/Replacement	Each	1	-			\$ -
24	Room A/C Replacement	Each	879	72.93		9	\$ 63,680.53
25	Central A/C Replacement	Each	3,100	197.05		15	\$ 886,092.46
26	Heat Pump Replacement	Each	288	708.10		15	\$ 295,824.81
27	Evaporative Coolers (Replacement)	Each	#REF!				\$ -
28	Evaporative Coolers (Installation)	Each	10,984	484.89		15	\$ 7,725,827.45
29	Duct Testing and Sealing	Home	3,058	33.11		18	\$ 164,857.86
30	New - Energy Efficient Fan Control	Home	-				\$ -
31	New - Prescriptive Duct Sealing	Home	-				\$ -
32	New - High Efficiency Forced Air Unit (HE FAU)	Home	#REF!				\$ -
33	New - A/C Time Delay	Home	-				\$ -
34	Maintenance						
35	Furnace Clean and Tune	Home	-				\$ -
36	Central A/C Tune-up	Home	1	204.00		5	\$ 123.43
37	Lighting						
38	Compact Fluorescent Lights (CFLs)	Each	237,659	16.66		9.4	\$ 3,932,828.10
39	Interior Hard wired CFL fixtures	Each	-				\$ -
40	Exterior Hard wired CFL fixtures	Each	1,791	34.96		16	\$ 94,943.45
41	Torchiere	Each	3,899	90.27		16	\$ 533,220.82
42	Torchiere - LED	Each	7,235	38.43		16	\$ 421,469.42
43	Occupancy Sensor	Each	-				\$ -
44	LED Night Lights	Each	-				\$ -
45	New - LED Diffuse Bulb (60W Replacement)	Each	-				\$ -
46	New - LED Reflector Bulb	Each	-				\$ -
47	New - LED Reflector Downlight Retrofit Kits	Each	-				\$ -
48	New - LED A-Lamps	Each	107,634	39.10		16	\$ 6,373,584.90
49	Miscellaneous						
50	Pool Pumps	Each	2,179	1,743.48		10	\$ 4,099,677.96
51	Smart Power Strips	Each	42,811	24.30		5	\$ 629,446.08
52	New - Smart Power Strips - Tier 2	Each	721	130.00		5	\$ 56,712.07
53	Ancillary Services						
54	Commissioning	Home					\$ -
55	Audit	Home					\$ -
56	Administration	Home					\$ -
57	Pilots						
58							\$ -
59							
60	Total		#REF!				\$ -
61							
62	Total Homes Served By the Program	80,333					
63	Life Cycle Bill Savings Per Home	\$ 41,459,029					
64							
65							
66	[1] Summary data which includes ESA Program, CSD Leveraging, and MF common area efforts.						
67	[2] For microwaves, the savings estimate comes from a separate analysis completed by Evergreen Economics. A reasonable estimate for the usage of the microwave, which would be shown as negative kWh, is not available at this time; however, we expect this to be addressed in the next impact evaluation.						
68	[3] Ordering Paragraph 34 of D. 14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.						
69							

	A	B	C	D
1	Southern California Edison - PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 10 Energy Rate Used for Bill Savings Calculations [1][2]			
2	Year	\$/kWh	\$/Therm	
3	2017	0.13	0.00	
4	2018	0.14	0.00	
5	2019	0.14	0.00	
6	2020	0.15	0.00	
7	2021	0.15	0.00	
8	2022	0.15	0.00	
9	2023	0.16	0.00	
10	2024	0.16	0.00	
11	2025	0.17	0.00	
12	2026	0.17	0.00	
13	2027	0.18	0.00	
14	2028	0.18	0.00	
15	2029	0.19	0.00	
16	2030	0.20	0.00	
17	2031	0.20	0.00	
18	2032	0.21	0.00	
19	2033	0.21	0.00	
20	2034	0.22	0.00	
21	2035	0.23	0.00	
22	2036	0.23	0.00	
23	2037	0.24	0.00	
24	2038	0.25	0.00	
25	2039	0.26	0.00	
26	2040	0.26	0.00	
27	2041	0.27	0.00	
28				
29	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.			
30	[2] For 2017, the average cost per kWh and therm paid by ESA participants is shown. Cost is escalated 3% annually for remaining years.			
31				
32				

	A	B	C	D	E
1	Southern California Edison Company - PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 11 Bill Savings Calculations by Program Year [1]				
2	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
3	2011	\$ 50,340,375	\$ 55,501,061	1.10	\$ 592
4	2012	\$ 39,378,995	\$ 24,591,923	0.62	\$ 502
5	2013	\$ 55,604,816	\$ 40,191,998	0.72	\$ 582
6	2014	\$ 55,886,233	\$ 39,869,484	0.71	\$ 518
7	2015	\$ 51,068,549	\$ 36,544,121	0.72	\$ 675
8	2016	\$ 56,095,969	\$ 33,470,336	0.60	\$ 815
9	2017	\$ 61,120,956	\$ -	0.00	\$ -

Southern California Edison - PY 2017 Energy Savings Assistance Program Annual Report
ESAP Table 12
Fund Shifting¹

		FUND SHIFT AMOUNT																							
		Budget ¹			Expenditures			(Shift) or Carried Forward (Budget - Expenditures = Variance)			Among Categories within Program Year 1-3			Carry Forward from 2016			Carry Back from 2018								
Date ⁵	Program Year 2017	Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures ⁷	Variance			(1) Shift of Current Year Authorized			(2) Shift of Carry Forward			(3) Shift of Carry Back			Total Shifted Gas/ Electric ⁴	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization
								Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total						
	ESA Program:	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	(\$x,xxx)	x%				G-xxxx, D,xx-xx-xxx
	Energy Efficiency																								
	Appliance	\$ 19,877,351	\$ -	\$ 19,877,351	\$ 15,026,523	\$ -	\$ 15,026,523	\$ 4,850,828	\$ -	\$ 4,850,828		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Domestic Hot Water	\$ 27,143	\$ -	\$ 27,143	\$ 11,384	\$ -	\$ 11,384	\$ 15,760	\$ -	\$ 15,760		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Enclosure	\$ 188,160	\$ -	\$ 188,160	\$ 50,031	\$ -	\$ 50,031	\$ 138,129	\$ -	\$ 138,129		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	HVAC	\$ 21,373,954	\$ -	\$ 21,373,954	\$ 25,212,040	\$ -	\$ 25,212,040	\$ (3,838,086)	\$ -	\$ (3,838,086)		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Maintenance	\$ 91,665	\$ -	\$ 91,665	\$ 130	\$ -	\$ 130	\$ 91,535	\$ -	\$ 91,535		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Lighting	\$ 2,647,334	\$ -	\$ 2,647,334	\$ 3,710,805	\$ -	\$ 3,710,805	\$ (1,063,471)	\$ -	\$ (1,063,471)		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Miscellaneous	\$ 2,842,731	\$ -	\$ 2,842,731	\$ 4,456,821	\$ -	\$ 4,456,821	\$ (1,614,090)	\$ -	\$ (1,614,090)		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Customer Enrollment	\$ 4,071,924	\$ -	\$ 4,071,924	\$ 6,398,080	\$ -	\$ 6,398,080	\$ (2,326,156)	\$ -	\$ (2,326,156)		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	In Home Education ^{3,4}	\$ 1,322,070	\$ -	\$ 1,322,070	\$ 998,003	\$ -	\$ 998,003	\$ 324,068	\$ -	\$ 324,068		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Pilot ³	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Fund Shifting Offset ²		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Energy Efficiency TOTAL	\$ 52,442,332	\$ -	\$ 52,442,332	\$ 55,863,817	\$ -	\$ 55,863,817	\$ (3,421,485)	\$ -	\$ (3,421,485)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Training Center	\$ 493,828	\$ -	\$ -	\$ 107,176	\$ -	\$ 107,176	\$ 386,652	\$ -	\$ 386,652	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Inspections	\$ 1,051,652	\$ -	\$ 1,051,652	\$ 829,412	\$ -	\$ 829,412	\$ 222,240	\$ -	\$ 222,240		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Marketing and Outreach	\$ 950,000	\$ -	\$ 950,000	\$ 385,846	\$ -	\$ 385,846	\$ 564,154	\$ -	\$ 564,154		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Statewide ME&O ³	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	M&E Studies ³	\$ 226,250	\$ -	\$ 226,250	\$ 15,189	\$ -	\$ 15,189	\$ 211,061	\$ -	\$ 211,061		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Regulatory Compliance ³	\$ 450,856	\$ -	\$ 450,856	\$ 455,011	\$ -	\$ 455,011	\$ (4,155)	\$ -	\$ (4,155)		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	General Administration ³	\$ 3,926,101	\$ -	\$ 3,926,101	\$ 3,334,775	\$ -	\$ 3,334,775	\$ 591,326	\$ -	\$ 591,326		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	CPUC Energy Division ³	\$ 60,000	\$ -	\$ 60,000	\$ 54,752		\$ 54,752	\$ 5,248	\$ -	\$ 5,248		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	TOTAL PROGRAM COSTS [*]	\$ 59,601,019	\$ -	\$ 59,601,019	\$ 61,045,978	\$ -	\$ 61,045,978	\$ (1,444,959)	\$ -	\$ (1,444,959)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%				
	TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					

Note: Numbers reported in standard accounting format, with negative amounts displayed in parentheses (\$xxx)
[*] - The overspent in this table will be covered by the underspent budget in ESA Table 1/
[2] Reflects the funding authorized in D.16-11-022 per year and updated in Commission Resolution E-4885 dated December 14, 2017 which addressed SCE Conforming Advice Letter E-3585-E-A filed on June 20, 2017.
[2] Please indicate whether authorized budget includes shifted funds from previous year and/or program cycle, and/or 2009-2016 program years. (Yes or No) If yes, please spec amount, date fund-shifting activity occurred, date of fund-shifting request and related approval is applicabl

	A	B
1	Southern California Edison Company - PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 13 Categorical and Other Enrollment [1]	
2		
3		
4		
5		
6	Type of Enrollment	Number of Homes Treated
7	Women, Infants, and Children Program (WIC)	7,501
8	Supplemental Security Income (SSI)	4,012
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	3,298
10	CalWORKs/Temporary Assistance for Needy Families (TANF)	431
11	Tribal TANF	-
12	Medicaid/Medi-Cal for Families	13,301
13	Healthy Families A&B	-
14	National School Lunch Program (NSLP) - Free Lunch	865
15	Low-income Home Energy Assistance Program (LIHEAP)	1
16	Bureau of Indian Affairs General Assistance	-
17	Head Start Income Eligible - (Tribal Only)	-
18	Targeted Self Certification	-
19	Other - Categorical	6,536
20	Standard Enrollment	44,388
21	Total	80,333
22		
23		
24	[1] Summary data which includes ESA Program and CSD Leveraging efforts.	

Southern California Edison Company - PY 2017 Energy Savings Assistance Program Annual Report
ESAP Table 14
Leveraging & Integration [6]

Coordination Type [1]	Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measureable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
Leveraging, Program Coordination, Datasharing	Grid Alternatives (Single-family Affordable Solar Homes (SASH) program administrator)	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	\$ 395	\$ 31,284	N	79		Y	
Leveraging, Datasharing	Other IOU ESA Programs (SCG, PG&E, SWG, Datasharing)	IOUs share lists of homes served in joint territories.	Y	Y	\$ 200,065	\$ 15,845,148	N	40,013		Y	
Interdepartmental Integration, Program Coordination	Shared Marketing Materials & Resources	Welcome Kit: 351,320 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	\$ 207,279	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.
Interdepartmental Integration, Program Coordination	Marketing Materials & Resources	~274,000 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	\$ 161,660	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.
Interdepartmental Integration, Program Coordination	Marketing Materials & Resources	Bill Onsert: Article on resources to help reduce your bill provided to ~4.1 million customers, and included ESA.	N	N	\$ 2,419,000	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.
Program Coordination	Joint Contractor Accreditation	SCE used existing CMHP	Y	Y	N/A	1,094,148	N	2,763		N	This combination likely enhanced perceived value of both programs to potential participants when being asked to participate.

[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).

[3] Annual Energy savings/benefits for measures installation in 2017. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.

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

[6] Summary data which includes ESA Program, CSD Leveraging, and MF common area efforts.

Fields not applicable to specific efforts are marked "N/A"

	A	B	C	D	E	F
1	Southern California Edison Company - PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 15 Lighting [4]					
2						
3						
4						
5	ESA Program CFL Tracking Table					
6	<i>Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each</i>					
7	Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	Admin Cost (overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin) [1]	AB 1109 Compliant? [2]
8	13 Watt - CFL	13 Watt - CFL			\$6.68	Yes
9	14 Watt - CFL	14 Watt - CFL			\$6.68	Yes
10	18 Watt - CFL	18 Watt - CFL			\$7.11	Yes
11	19 Watt - CFL	19 Watt - CFL			\$7.11	Yes
12	23 Watt - CFL	23 Watt - CFL			\$7.18	Yes
13						
14						
15						
16						
17	Year	Number of Homes Treated in ESA Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs [3]	
18	2009	62,624	33,642	4.2	2,269,248	
19	2010	121,868	49,982	4.9	3,948,768	
20	2011	93,771	54,615	4.9	4,529,616	
21	2012	49,026	44,872	4.2	3,661,426	
22	2013	69,031	61,471	4.2	6,493,686	
23	2014	76,983	67,444	4.0	6,811,448	
24	2015	54,127	43,258	4.9	4,449,325	
25	2016	41,070	40,820	7.1	4,790,255	
26	2017	80,333	45,185	5.3	3,959,404	
27						
28	[1] Bulb cost and admin cost were combined effective 2013.					
29						
30	[2] Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?					
31	Do all models comply with Europe's RoHS standards on toxicity?					
32						
33	[3] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.					
34						

	A	B	C	D	E	F	G
1	Southern California Edison - PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 16 "Add Back" Measures						
2							
3							
4							
5			Ratio of Benefits Over Costs				
6	Measure [1][2]	Climate Zone	ESACET	Resouce TRC	Quantity Installed	Budget Impact of "Add Back"	Lifecycle Bill Savings Impact
7	Central AC - Multi Family	14	0.05	0.04	59	\$ 232,865	\$8,303
8	Central AC - Single Family	14	0.05	0.04	1,919	\$ 7,625,402	\$280,261
9	Central AC - Single Family	15	0.20	0.16	770	\$ 3,159,673	\$444,458
10	AC - Maintenance - Single Family	14	0.92	0.74	1	\$ 203	\$123
11	Enclosure - Mobile Home	9	-	-	1	\$ 25	\$0
12	Enclosure - Mobile Home	10	1.05	0.81	6	\$ 537	\$441
13	Enclosure - Mobile Home	14	0.89	0.70	9	\$ 1,266	\$855
14	Enclosure - Mobile Home	15	0.96	0.76	4	\$ 514	\$376
15	Enclosure - Mobile Home	16	0.77	0.59	5	\$ 265	\$158
16	Enclosure - Multi Family	6	1.20	0.93	34	\$ 6,274	\$5,867
17	Enclosure - Multi Family	8	0.48	0.37	79	\$ 9,837	\$3,594
18	Enclosure - Multi Family	9	1.65	1.29	30	\$ 7,261	\$8,994
19	Enclosure - Multi Family	10	0.62	0.48	30	\$ 2,713	\$1,327
20	Enclosure - Multi Family	13	2.00	1.55	1	\$ 117	\$182
21	Enclosure - Multi Family	14	1.08	0.85	17	\$ 2,199	\$1,802

Southern California Edison - PY 2017 Energy Savings Assistance Program Annual Report
ESAP Table 17

Expenditures for Pilots and Studies

	Authorized 2017 Funding			2017 Expenses			% of Budget Expensed		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots									
Programmable Controllable Thermostat	\$ 250,000	NA	\$ 250,000			\$ -	0	0	0
Total Pilots	\$250,000	\$0	\$250,000	\$0	\$0	\$0	\$0	\$0	\$0
Studies									
Non Energy Benefits (NEB) Study	\$ 45,000	NA	\$ 45,000	\$ -		\$ -			
Rapid Feedback Research and Analysis	\$ 200,000	NA	\$ 200,000	\$ -		\$ -	0	0	0
Low Income Needs Assessment Study	\$ 150,000	NA	\$ 150,000	\$ -		\$ -	0	0	0
Load Impact Evaluation Study	\$ 165,000	NA	\$ 165,000	\$ 56,824		\$ 56,824	0.344388	0	0.344388
2017 Potential and Goals Study	\$ 90,000	NA	\$ 90,000	\$ -		\$ -	0	0	0
Total Studies	\$650,000	\$0	\$650,000	\$56,824	\$0	\$56,824	0.087422	0	0.087422

Southern California Edison Company - PY 2017 Energy Savings Assistance Program Annual Report
ESAP Table 18
Miscellaneous (2nd Refrigerators, Education Only, A/C Cycling, etc.)

SCE is not yet providing second refrigerators as part of the ESA Program.

Measures	Units	Received Refrigerator	Not eligible for Refrigerator due to Less than Six Occupants
Second Refrigerators	Each	N/A	N/A

Measures	Units	Households that Only Received Education
In-Home Education	Home	14,004

SCE is not yet tracking My Account enrollments as a result of ESA Program assessments.

Households for My Energy/My Account Platform		
Opt-Out	Already Enrolled	Opt-In
N/A	N/A	N/A

SCE is not yet providing A/C cycling controls concurrently with A/C installation.

Households Received A/C Cycling Controls when A/C Installed	
	# Installed
A/C Cycling controls	N/A

SCE is not yet tracking ESA customer elections into DR programs.

Households that Received ESA Program Measures and Elect to:
Opt-In to a New Program (DR or alternative tariff)
N/A

	A	B	C	D	E	F	G	H
1	Southern California Edison - PY 2017 CARE Annual Report							
2	CARE Table 1							
3	Overall Program Expenses							
4	Category	Overall Expenditures		Total	Authorized Budget	% of Budget Spent	Total Shifted	Shifted to/from?
5		Electric	Gas					
6	Outreach	\$ 2,352,087	\$ -	\$ 2,352,087	\$ 2,578,703	91%		
7	Processing, Certification, Recertification	\$ 1,122,436	\$ -	\$ 1,122,436	\$ 1,116,895	100%	\$ 5,541	From IT Programming
8	Post Enrollment Verification	\$ 655,435	\$ -	\$ 655,435	\$ 338,165	194%	\$ 317,270	From IT Programming
9	IT Programming	\$ 1,145,445	\$ -	\$ 1,145,445	\$ 4,060,000	28%	\$ (322,811)	To Processing, Certification, Recertification and Post Enrollment Verificaiton
10	Cool Centers	\$ 26,454	\$ -	\$ 26,454	\$ 41,461	64%		
11	Pilots (CHANGES)	\$ 457,992	\$ -	\$ 457,992	\$ 525,000	87%		
12	Measurement & Evaluation	\$ -	\$ -	\$ -	\$ 150,000	0%		
13	Regulatory Compliance	\$ 270,598	\$ -	\$ 270,598	\$ 367,342	74%		
14	General Administration	\$ 548,097	\$ -	\$ 548,097	\$ 664,086	83%		
15	CPUC Energy Division	\$ 127,755	\$ -	\$ 127,755	\$ 140,000	91%		
16								
17	TOTAL Program Costs	\$ 6,706,298	\$ -	\$ 6,706,298	\$ 9,981,653	67%	\$ -	
18								
19	CARE Rate Discount	\$ 375,043,839	\$ -	\$ 375,043,839	\$ 457,873,645	82%	\$ -	
20	Service Establishment Charge Discount	\$ -	\$ -	\$ -	\$ -	0%	\$ -	
21								
22	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 381,750,137	\$ -	\$ 381,750,137	\$ 467,855,298	82%	\$ -	
23								
24								
25								
26								
27								

	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	
1	Southern California Edison - PY 2017 CARE Annual Report																									
2	CARE Table 2																									
3	Enrollment, Recertification, Attrition, & Penetration																									
4		New Enrollment										Recertification					Attrition (Drop Offs)					Enrollment		Total CARE	Estimated	Penetration
5		Automatic Enrollment			Self-Certification (Income or Categorical)							Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response ^a	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+G)	Net Adjusted (K-T)	Total CARE Participants	CARE Eligible	Rate % (W/X)
6		Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																
7	January	1,836	804	0	2,640	3,589	5,863	8,014	186	17,652	20,292	16,012	10,445	0	26,457	11,782	115	539	7,722	20,158	46,749	134	1,235,889	1,457,787	84.8%	
8	February	1,666	545	0	2,211	3,068	5,354	7,699	214	10,365	10,578	12,686	7,365	0	23,776	11,709	90	435	12,301	24,355	42,352	-9,599	1,229,930	1,457,787	84.4%	
9	March	3,472	642	0	3,914	3,063	5,556	8,481	262	17,362	21,278	14,840	17,638	0	32,478	16,779	126	494	10,372	27,771	53,754	-8,495	1,223,435	1,457,787	83.9%	
10	April	1,658	604	0	2,262	3,288	4,543	6,752	215	14,568	16,860	14,251	10,364	0	24,615	9,144	524	14,190	23,963	41,475	-7,103	1,216,332	1,457,787	83.4%		
11	May	3,761	636	0	4,397	3,063	11,588	7,475	203	23,239	26,726	15,121	17,495	0	32,616	10,229	95	519	11,175	22,018	59,342	4,708	1,221,040	1,457,787	83.8%	
12	June	2,276	452	0	4,278	4,110	9,937	8,014	290	22,351	25,079	17,913	13,072	0	30,985	14,622	90	593	14,599	10,706	56,064	14,373	1,235,413	1,457,787	84.7%	
13	July	1,928	567	0	2,493	5,612	7,871	10,314	183	23,880	28,473	15,159	12,866	0	28,025	10,327	258	210	14,491	40,191	54,468	-13,718	1,221,695	1,457,787	83.8%	
14	August	2,368	442	0	2,810	8,120	8,161	13,825	214	30,320	33,130	22,683	16,753	0	39,436	12,077	98	780	13,843	26,798	72,566	6,332	1,228,027	1,457,787	84.2%	
15	September	1,889	654	0	2,523	5,727	11,059	10,567	196	27,549	30,072	19,534	22,499	0	42,033	20,280	88	777	-489	20,656	72,105	9,416	1,237,443	1,457,787	84.9%	
16	October	3,749	758	0	4,507	4,257	11,544	9,531	197	25,529	30,036	17,328	19,946	0	37,274	11,379	170	710	27,952	40,211	67,310	-10,175	1,227,268	1,457,787	84.2%	
17	November	2,792	626	0	3,420	4,371	4,288	7,308	94	16,061	19,481	13,174	10,567	14	27,729	16,763	540	166	19,763	28,036	47,210	-8,555	1,218,713	1,457,787	83.6%	
18	December	3,176	473	0	3,649	4,076	9,352	6,294	136	19,658	23,507	13,891	15,898	0	29,789	12,067	83	567	6,977	19,694	53,296	3,813	1,222,526	1,457,787	84.9%	
19	YTD Total	30,549	7,005	0	37,554	52,374	94,916	104,274	2,390	253,954	291,508	192,591	182,622	0	375,213	156,622	1,313	7,036	145,426	304,737	666,721	-13,229	1,222,526	1,457,787	83.9%	
20																										
21																										
22	¹ Enrollments via data sharing between the IOUs.																									
23	² Enrollments via data sharing between departments and/or programs within the utility.																									
24	³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.																									
25	^a No response includes no response to both Recertification and Verification.																									

Southern California Edison - PY 2017 CARE Annual Report

CARE Table 3A - Post-Enrollment Verification Results (Model) 2017

Month	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
January	1,235,889	2,368	0.19%	1,581	44	1,625	68.62%	0.13%
February	1,229,930	3,239	0.26%	2,191	48	2,239	69.13%	0.18%
March	1,223,435	4,296	0.35%	2,837	81	2,918	67.92%	0.24%
April	1,216,332	5,637	0.46%	3,874	75	3,949	70.05%	0.32%
May	1,221,040	5,850	0.48%	3,969	79	4,048	69.20%	0.33%
June	1,235,413	4,189	0.34%	2,991	47	3,038	72.52%	0.25%
July	1,221,695	4,758	0.39%	3,200	66	3,266	68.64%	0.27%
August	1,228,027	113	0.01%	80	0	80	70.80%	0.01%
September	1,237,443	67	0.01%	44	1	45	67.16%	0.00%
October	1,227,268	4,426	0.36%	3,032	55	3,087	69.75%	0.25%
November	1,218,713	6,815	0.56%	4,083	84	4,167	61.14%	0.34%
December	1,222,526	5,438	0.44%	34	61	95	1.75%	0.01%
YTD Total	1,222,526	47,196	3.86%	27,916	641	28,557	60.51%	2.34%

¹ Includes all customers who failed SDG&E's CARE eligibility probability model.

² Includes customers verified as over income or who requested to be de-enrolled.

³ Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending due to the time

⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.

CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)

PY 2017

Month	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through HUV Post Enrollment Verification	% of Total CARE Households De-enrolled
January	1,235,889	4,211	0.34%	3,953	33	3,986	94.66%	0.32%
February	1,229,930	8,534	0.69%	7,930	109	8,039	94.20%	0.65%
March	1,223,435	2,156	0.18%	2,003	16	2,019	93.65%	0.17%
April	1,216,332	695	0.06%	637	7	644	92.66%	0.05%
May	1,221,040	604	0.05%	553	1	554	91.72%	0.05%
June	1,235,413	2,252	0.18%	2,023	36	2,059	91.43%	0.17%
July	1,221,695	1,481	0.12%	1,358	19	1,377	92.98%	0.11%
August	1,228,027	13,843	1.13%	12,672	211	12,883	93.07%	1.05%
September	1,237,443	10,562	0.85%	9,734	133	0	0.00%	0.00%
October	1,227,268	2,941	0.24%	2,696	39	2,735	93.00%	0.22%
November	1,218,713	612	0.05%	552	6	558	91.18%	0.05%
December	1,222,526	2,003	0.16%	1,582	22	1,604	80.08%	0.13%
YTD Total	1,222,526	49,894	4.08%	45,693	632	36,458	73.07%	2.98%

¹ Includes all participants who were selected for high usage verification process.

² Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

³ Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.

	A	B	C	D	E	F	G	H
1	Southern California Edison - PY 2017 CARE Annual Report							
2	CARE Table 4							
3	CARE Self-Certification and Self-Recertification Applications ¹							
4		Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates	
5	Total (Y-T-D)	1,273,549	1,054,471	656,389	97,150	150,077	300,932	
6	Percentage		100%	62%	9%	14%	29%	
7								
8	¹ Includes sub-metered customers.							
9								
10								

	A	B	C	D	E	F	G	H
1	Southern California Edison - PY 2017 CARE Annual Report							
2	CARE Table 7							
3	CARE Capitation Contractors							
4	Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments ²		
5		Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total
6	ALPHA ENTERPRISES		x			0	0	0
7	APAC SERVICE CENTER	x				16	0	16
8	ARMENIAN RELIEF SOCIETY	x				0	0	0
9	ASIAN AMERICAN DRUG ABUSE PROG	x				8	0	8
10	ASIAN AMERICAN RESOURCE CENTER	x		x		5	0	5
11	ASIAN YOUTH CENTER	x				0	0	0
12	BEST PARTNERS	x				312	0	312
13	BETHEL BAPTIST CHURCH	x				0	0	0
14	BISHOP PAIUTE TRIBE	x				0	0	0
15	C.O.R. COMM DEVELOPMENT CORP	x				0	0	0
16	CAREGIVERS VOLUNTEERS ELDERLY		x			0	0	0
17	CHINESE CHRISTIAN HERALD CRUS.	x				3	0	3
18	CHINO NEIGHBORHOOD HOUSE		x			0	0	0
19	CITIHOUSING REAL ESTATE SERVIC		x			0	0	0
20	CITY IMPACT	x				1	0	1
21	CITY OF BEAUMONT SENIOR CENTER		x	x		0	0	0
22	CORONA NORCO FAMILY YMCA	x				0	0	0
23	DESERT ARC	x				0	0	0
24	DESERT MANNA MINISTRIES INC	x				0	0	0
25	DISABLED RESOURCES CTR, INC		x	x		15	0	15
26	EL CONCILIO DEL CONDADO DE	x		x		0	0	0
27	FAMILY SVC ASSOC OF REDLANDS	x				0	0	0
28	FOOD SHARE	x				2	0	2
29	GO THE CALENDAR STOP		x			1,965	0	1,965
30	HELP OF OJAI, INC.	x				1	0	1
31	HOUSING AUTHORITY OF KINGS CO	x		x		0	1	1
32	KERNVILLE UNION SCHOOL DISTRIC	x				0	2	2
33	KINGS COMMUNITY ACTION ORG	x				0	0	0
34	KINGS CTY COMMISSION ON AGING	x				0	0	0
35	LA COUNTY HOUSING AUTHORITY		x			0	0	0
36	LEAGUE OF CALIF HOMEOWNERS	x				0	0	0
37	LTSC COMM. DEVEL. CORP	x				4	0	4
38	MENIFEE VALLEY CHAMBER		x			0	0	0
39	MEXICAN AMERICAN OPPORTUNITY		x	x		0	0	0
40	MTN COMM FAM RESOURCE CNTR	x				1	0	1
41	NEW GREATER CIR. MISSION, INC	x				0	0	0
42	NEW HOPE VILLAGE, INC	x				4	0	4
43	NEW HORIZONS CAREGIVERS GROUP		x			0	0	0
44	OCCC	x				3	0	3
45	ONEOC	x				3	0	3
46	OPERATION GRACE	x				1	0	1
47	OUR COMMUNITY WORKS					18	0	18
48	PACIFIC ISLANDER HLTH (PIHP)	x				0	0	0
49	PACIFIC PRIDE FOUNDATION	x				0	0	0
50	RIVERSIDE DEPT COMM ACTION		x	x	x	0	22	22
51	SALVATION ARMY SANTA FE SPGS	x				3	0	3
52	SALVATION ARMY VISALIA CORPS	x				0	0	0
53	SANTA ANITA FAMILY SERVICE	x				0	0	0
54	SENIOR ADVOCATES OF THE DESERT	x				0	0	0
55	SHARE OUR SELVES	x				0	0	0
56	SMILES FOR SENIORS FOUND.	x				0	0	0
57	SOUTHEAST CITIES SERVICE CTR.		x			0	0	0
58	SOUTHEAST COMMUNITY DEVELOPMEN	x				0	0	0
59	ST VINCENT DE PAUL		x			0	0	0
60	THE CAMBODIAN FAMILY	x				0	0	0
61	UNITED CAMBODIAN COMMUNITY INC		x			0	0	0
62	VICTOR VALLEY COMM SVC COUNCIL	x				0	0	0
63	VIETNAMESE COMMUNITY OF OC INC	x				0	0	0
64	VOLUTNEERS OF EAST LOS ANGELES	x		x		0	0	0
65	XFINITI SOLUTIONS, LLC		x			0	0	0
66	Total Enrollments and Expenditures					2,365	25	2,390
67								
68	¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.							
69	² Enrollments reflect new enrollments only.							
70								

	A	B	C	D	E	F	G	H
1	Southern California Edison - PY 2017 CARE Annual Report							
2	CARE Table 8							
3	CARE Participants as of Month-End							
4	2017	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration Rate	% Change
5	January	0	N/A	1,235,889	1,235,889	1,457,787	85%	356%
6	February	0	N/A	1,229,930	1,229,930	1,457,787	84%	0%
7	March	0	N/A	1,223,435	1,223,435	1,457,787	84%	0%
8	April	0	N/A	1,216,332	1,216,332	1,457,787	83%	0%
9	May	0	N/A	1,221,040	1,221,040	1,457,787	84%	0%
10	June	0	N/A	1,235,413	1,235,413	1,457,787	85%	1%
11	July	0	N/A	1,221,695	1,221,695	1,457,787	84%	-1%
12	August	0	N/A	1,228,027	1,228,027	1,457,787	84%	0%
13	September	0	N/A	1,237,443	1,237,443	1,457,787	85%	1%
14	October	0	N/A	1,227,268	1,227,268	1,457,787	84%	-1%
15	November	0	N/A	1,218,713	1,218,713	1,457,787	84%	-1%
16	December	0	N/A	1,222,526	1,222,526	1,457,787	84%	0%
17								
18								

	A	B	C	D	E
1	Southern California Edison - PY 2017 CARE Annual Report				
2	CARE Table 9				
3	CARE Average Monthly Usage & Bill				
4					
5	Average Monthly Gas / Electric Usage				
6	Residential Non-CARE vs. CARE Customers				
7	Customer	Gas Therms	Gas Therms	Total	
8		Tier 1	Tier 2		
9	Non-CARE	61.8	3.9	65.8	
10	CARE	12.8	1.1	13.9	
11	Customer	Electric KWh	Electric KWh	Total	
12		Tier 1	Tier 2 and Above		
13	Non-CARE	292	241	533	
14	CARE	319	184	503	
15					
16					
17	Average Monthly Gas / Electric Bill ²				
18	Residential Non-CARE vs. CARE Customers ¹				
19	(Dollars per Customer)				
20	Customer	Gas	Electric		
21	Non-CARE	\$47.43	\$106.91		
22	CARE	\$40.41	\$58.03		
23					
24					
25	¹ Excludes master-meter usage.				
26	² Average Monthly Gas/Electric Bill reflects residential Non-CARE (CARE) 2017 total billed				
27	revenues divided by the average number of Non-CARE (CARE) 2017 monthly bills.				
28					
29					

	A	B	C	D	E	F
1	Southern California Edison - PY 2017 CARE Annual Report					
2	CARE Table 10					
3	CARE Surcharge & Revenue					
4	Electric					
5	CARE Surcharge and Revenue Collected by Customer Class					
6	Class	CARE Surcharge ¹	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
7	Residential[1]	\$9,187,116	\$421,978,950	2.2%	\$110,245,398	28.6%
8	Agricultural	\$608,131	\$16,666,306	3.6%	\$7,297,575	1.9%
9	Commercial	\$17,733,119	\$464,007,708	3.8%	\$212,797,432	55.3%
10	Industrial	\$2,790,130	\$47,313,075	5.9%	\$33,481,566	8.7%
11	Public Authority	\$1,714,561	\$42,780,259	4.0%	\$20,574,736	5.3%
12	Railroads	\$36,343	\$1,066,714	3.4%	\$436,121	0.1%
13	Interdepartmental[2]	\$648	\$26,452	2.4%	\$7,771	0.0%
14						
15						
16						
17	GAS					
18	CARE Surcharge and Revenue Collected by Customer Class					
19	Customer	Average Monthly		CARE Surcharge	Total CARE	Percentage of
20	Class	CARE Surcharge ²	Monthly Bill	as Percent of Bill	Surcharge Revenue	CARE Surcharge
21					Collected	Revenue Collected
22	Residential	\$771	\$52,125	1.5%	\$9,255	35.2%
23	Commercial	\$1,419	\$110,606	1.3%	\$17,029	64.8%
24	Natural Gas Vehicle	\$0	\$0	0.0%	\$0	0.0%
25	Industrial	\$0	\$0	0.0%	\$0	0.0%
26						
27	¹ Excludes CARE customers. Pursuant to D. 15-07-001, OP 4 and Section 11.1.1 authorizes adjustments to CARE to transition to the legislatively-mandated CARE discount range in compliance with Section 739.1 were authorized.					
28	² Electricity supplied for Edison-owned water & gas operations on Santa Catalina Islands					

	A	B	C	D	E	F
1	Southern California Edison - PY 2017 CARE Annual Report					
2	CARE Table 11					
3	CARE Capitation Applications ¹					
4	Entity	Total Received	Approved ²	Denied	Pending/ Never Completed	Duplicate
5	APAC SERVICE CENTER	24	16	2	0	6
6	ASIAN AMERICAN DRUG ABUSE PROG	22	8	0	0	14
7	ASIAN AMERICAN RESOURCE CENTER	8	5	1	0	2
8	BEST PARTNERS	312	312	0	0	0
9	CHINESE CHRISTIAN HERALD CRUS.	4	3	1	0	0
10	CITY IMPACT	3	1	0	0	2
11	DISABLED RESOURCES CTR, INC	15	15	0	0	0
12	FOOD SHARE	3	2	1	0	0
13	GO THE CALENDAR STOP	2,021	1,965	14	0	42
14	HELP OF OJAI, INC.	1	1	0	0	0
15	HOUSING AUTHORITY OF KINGS CO	3	1	1	0	1
16	KERNVILLE UNION SCHOOL DISTRIC	2	2	0	0	0
17	LTSC COMM. DEVEL. CORP	4	4	0	0	0
18	MTN COMM FAM RESOURCE CNTR	3	1	0	0	2
19	NEW HOPE VILLAGE, INC	5	4	0	0	1
20	NEW HORIZONS CAREGIVERS GROUP	0	0	0	0	0
21	OCCC	6	3	2	0	1
22	ONEOC	3	3	0	0	0
23	OPERATION GRACE	1	1	0	0	0
24	OUR COMMUNITY WORKS	19	18	0	0	1
25	RIVERSIDE DEPT COMM ACTION	38	22	4	0	12
26	SALVATION ARMY SANTA FE SPGS	5	3	2	0	0
27	Total	2,502	2,390	28	0	84
28						
29						
30	¹ Includes sub-metered customers.					
31	² Includes new enrollments and recertification applications approved.					
32						

	B	C	D	E	F	G	H
1	Southern California Edison - PY 2017 CARE Annual Report						
2	CARE Table 12						
3	CARE Expansion Program						
4							
5	Participating Facilities by Month						
6	2017	Gas			Electric		
7		CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
8	January	0	0	0	434	174	608
9	February	0	0	0	420	177	597
10	March	0	0	0	438	182	620
11	April	0	0	0	463	180	643
12	May	0	0	0	459	173	632
13	June	0	0	0	420	164	584
14	July	0	0	0	372	158	430
15	August	0	0	0	374	155	529
16	September	0	0	0	359	152	511
17	October	0	0	0	365	151	516
18	November	0	0	0	365	156	521
19	December	0	0	0	355	155	510
20							
21							
22	Average Monthly Gas / Electric Usage ¹						
23	Customer	Gas	Electric				
24		Therms	KWh				
25	Residential Facilities	N/A	947				
26	Commercial Facilities	N/A	11,549				
27							
28							
29	CARE Expansion Self-Certification and Self-Recertification Applications						
30		Received	Approved	Denied	Pending/Never Completed	Duplicates	
31	Total	596	417	179	0	0	
32	Percentage		70%	30%	0%	0%	
33							
34							
35	¹ Excludes master meter usage.						

	A	B	C	D	E	F	G	H	I	J
1	Southern California Edison - PY 2017 CARE Annual Report									
2	CARE Table 13									
3	CARE High Usage Verification Results ⁵									
4										
5	Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring		
6	Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) ¹	Income Verified and Referred to ESA	Failed and Removed ²	Ineligible ³	Completed	Removed ⁴	Appeals Denied	Appeals Approved
7	49,894	45,909	632	3,755	2,254	158	1,343	216	32	88
8	¹ Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program. ² Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms. ³ Includes customers who previously participated in ESA Program, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3. ⁴ Customers removed for exceeding 600% of baseline in any monthly billing cycle. ⁵ High usage is defined as a customer that exceeds 400% or 600% of baseline.									
9										
10										
11										
12										
13										
14										
15										

Southern California Edison - PY 2017 CARE Annual Report								
CARE Table 13A								
CARE Customer Usage and ESA Program Treatment								

# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV ¹	Percent of those CARE customers Not served by ESA Program ²	# of Enrollments led to ESA Program measure Installations[3]	# of Long-Term tenancy CARE customers who have Not applied for ESA Program[4]	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment				Energy Usage of CARE customers who do Not accept ESA Program treatment
				Energy Usage before ESA Program treatment	Energy Usage within 3-months of ESA Program treatment	Energy Usage within 6-months of ESA Program treatment	Energy Usage within 12-months of ESA Program treatment	
32,360	49%	N/A	N/A	N/A	N/A	N/A	N/A	N/A

TARGETING MARKETING EFFORTS TO THIS GROUP DID NOT OCCUR IN 2017

- 1 Those CARE customers who have been on CARE reate at the same meter for a least six years.
2 Those CARE customers who have not participated in the ESA Program prior to receiving targeted marketing.
3 SCE will implement "targeted marketing" to this group in 2018.
4 This data will be tracked in SCE's ESA program database.

	A	B
1	Southern California Edison - PY 2017 CARE Annual Report	
2	CARE Table 14	
3	Categorical Enrollment	
4	Type of Enrollment	Number of Customer Enrollments¹
5	Bureau of Indian Affairs General Assistance	354
6	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	64,531
7	CalWORKs/Temporary Assistance for Needy Families (TANF) 2	-
8	Head Start Income Eligible - (Tribal Only)	1,467
9	Healthy Families A&B	26,976
10	Low-income Home Energy Assistance Program (LIHEAP)	5,077
11	Medicaid/Medi-Cal	147,359
12	National School Lunch Program (NSLP) - Free Lunch	46,129
13	Supplemental Security Income (SSI)	27,683
14	Tribal TANF 2	11,875
15	VRU - State Programs	441
16	Women, Infants, and Children Program (WIC)	43,939
17	¹ Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account. ² CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	
18		
19		
20		
21		

Attachment 2

SCE's FERA Programs Annual Report for Program 2017



**Southern California Edison Company's
(U-338 E) Report
for the**

Family Electric Rate Assistance (FERA) Program

**For The Period
January — December 2017**

May 1, 2018

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1. Participant Information

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

See Table 1, below.

Table 1. FERA Customers Enrolled

2017	FERA Enrolled	FERA Receiving Tier 3 Benefit¹
January	19,056	N/A
February	18,906	N/A
March	18,767	N/A
April	18,726	N/A
May	18,778	N/A
June	18,707	N/A
July	19,135	N/A
August	19,293	N/A
September	19,601	N/A
October	19,728	N/A
November	19,510	N/A
December	19,662	N/A

See Table 2, below.

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

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

Table 2. FERA Penetration Rate

2017 Quarter Ending	FERA-Eligible Households	FERA-Participating Households	FERA Household Penetration Rate²
March 31	218,763	18,767	8.6%
June 30	218,763	18,707	8.6%
September 30	218,763	19,601	9.0%
December 31	218,763	19,662	9.0%

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

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

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

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

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

² FERA Household Penetration Rate is calculated by dividing FERA Participating Households by FERA-Eligible Households.

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SCE counts the number of households (by small area, by county, and overall) that are enrolled in FERA monthly. The FERA 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, and positive changes expected to occur in California after the recession). The method adjusted block group marginal distributions on household income based on sub-state modeling that incorporated Current Population Survey, Integrated Public Use Microdata Survey data, American Community Survey Data, and California Employment Development Department county and Metropolitan Statistical Area level labor force series. This adjustment to block group income marginal is then incorporated into the otherwise “standard” estimation approach to produce small-area estimates reflecting small-area income changes due to labor market forces.

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

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

As of December 31, 2017, there were 91 sub-metered tenants participating in FERA.

1.5 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 2017.

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2. Program Costs

2.1 Discount Cost

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

The average monthly FERA discount received, in dollars per FERA customer was \$23.02.³

2.1.2 *State the cumulative annual discount for all FERA customers.*

The cumulative annual discount for all FERA customers was \$5,300,980.⁴

2.2 Administrative Cost

2.2.1 *Show the FERA Program's administrative cost by category.*

See Table 3, below.

Table 3. FERA Program Administrative Costs by Category and Benefits

Category	\$ Cost
Outreach/Marketing	54,350
Processing, Certification, Recertification ⁵	0
Post Enrollment Verification ⁵	0
General Administration ⁵	0
Information Technology	66,279
Capitation	988
TOTAL PROGRAM COSTS	121,617
CUSTOMER BENEFITS	5,300,980
TOTAL PROGRAM COSTS & CUSTOMER BENEFITS	5,422,597

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

⁴ Includes all enrolled customers who received a discount in any month.

⁵ Costs are not tracked separately from CARE; therefore, costs in these categories have been charged to the CARE Program.

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2.3 Explain what is included in each administrative cost category.

See Table 4, below.

Table 4. Administrative Cost Categories

Category	Description
Outreach	Includes: Bill onsert, 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: <ul style="list-style-type: none"> • Information Technology / Programming: • Programming and labor costs associated with system enhancements, compliance, and maintenance of existing processes. Regulatory Compliance: <ul style="list-style-type: none"> • Applications, testimony, advice filings, comments and reply comments, hearings, reports and studies, working group meetings, public input meetings, and tariff revisions. Other: <ul style="list-style-type: none"> • 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.

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2.4 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.

2.5 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 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.

3. Outreach

3.1 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 as are willing to participate in FERA. FERA enrollment increased from 19,102 in December 31, 2016, to 19,662 in December 31, 2017, which represents a net increase of 560 households.

FERA outreach was conducted as an adjunct to CARE outreach from January through December 2017 as follows:

- The outreach efforts of the CARE and FERA programs and communications to SCE's in-language and under-penetrated areas continued to be a priority. SCE's CARE and FERA programs partner with internal SCE departments such as Public Affairs, Consumer Affairs, Customer Experience Management, Corporate Communications, Community Involvement, Speakers Bureau, and employee volunteer-based Resource Groups. These programs also partner with external organizations such as 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, all phone center representatives in SCE's Customer Communications Organization can enroll eligible customers in the CARE or FERA Programs via the online web enrollment application, or can send out paper applications if requested.
- In 2017, SCE hosted several events celebrating Black History Month, Asian American Pacific Islander Month, and Hispanic Heritage Month in the communities we serve. In previous years, SCE celebrated at its Irwindale Energy Education Center, but now prefer to join the community, rather than have the community come to SCE. These events provided a wealth of information on programs and services, including the CARE, FERA, and ESA Programs, available to customers, businesses, and nonprofit organizations. This strategy builds program awareness at a grassroots and community level where many income-qualified households may connect.
- In 2017, SCE participated in nearly 130 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, and winter festivals, more than 125,000 customers received information on the CARE, FERA, and ESA Programs as ways to help lower their energy usage and electric bills.

3.2 Discuss each of the following:

3.2.1 *The CHANGES Pilot Program*

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). This pilot was authorized as an ongoing program in Decision 15-12-047, adopted on December 15, 2015, and became permanent June 1, 2016. The program provides limited English-speaking customers in-language education, needs and dispute resolution, and outreach for energy issues. The program is administered through a contract with the California Public Utilities Commission (CPUC), using the same community contractor, Self Help for the Elderly (SHE) and 27 CBOs, which also administer the CPUC's Telecommunications Education and Assistance in Multiple-Languages (TEAM) program.

The CHANGES CBOs during the pilot in SCE's service territory were: : 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. When the program became permanent on June 1, 2017, all 28 CHANGES CBOs were authorized to work on cases from any IOU (for example, in the pilot, the CBOs up north were limited to PG&E, but that is not the case any longer.) The following is a list of the CBOs:

1. ACC Senior Services
2. Afghan Coalition
3. Alliance for African Assistance
4. American Relief Society
5. Asian American Resource Center
6. Asian Community Center
7. CASA Familiar
8. Central California Legal Services
9. Centro la Familia Advocacy Services Inc.
10. Chinatown Service Center
11. Chinatown Service Center
12. Chinese Newcomers Service Center
13. Deaf Community Services of San Diego
14. Delhi Center
15. El Concilio of San Mateo County
16. Fresno Center for New Americans

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17. Good Samaritan Family Resource Center
18. International Institute of Los Angeles
19. International Rescue Committee
20. Korean American Community Services
21. Koreatown Youth And Community Center
22. Lao Khmu Association, Inc.
23. Little Tokyo Service Center
24. Madera Coalition for Community Justice
25. Portuguese Community Center
26. Self-Help for the Elderly
27. Southeast Asian Community Center
28. SUSCOL Intertribal Council
29. Southland Integrated Services

The Resolution directs the pilot to be funded by SCE, PG&E, SDG&E, and SoCalGas, through CARE outreach program funding. SCE pays CPUC directly through monthly invoices.

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

- **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.
- **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 36 languages.
- **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 activities shown in the following table for SCE (January-December 2017).

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Table: CHANGES Activities

Component (in language)	Activity
Community Events:	
<ul style="list-style-type: none"> • Cantonese • Chinese • English • Japanese • Mandarin • Spanish • Vietnamese 	CBOs did outreach and distributed materials at several local events
Media:	
<u>Television</u>	
None	
<u>Radio</u>	
<ul style="list-style-type: none"> • Korean • Vietnamese 	<ul style="list-style-type: none"> • KYPA – 1230 AM Radio • Bolsa Radio
<u>Print</u>	
<ul style="list-style-type: none"> • Armenian – reached 12,550 	<ul style="list-style-type: none"> • Molorak Weekly • Azbarez Armenian Daily Newspaper
<u>Social Media</u>	
<ul style="list-style-type: none"> • Twitter Tweets • Facebook Posts • Instagram Posts • Other Networks 	
Consumer Education: By Topic	
<ul style="list-style-type: none"> • Armenian • Cambodian • Cantonese • English • Farsi • Indonesian • Japanese • Korean • Mandarin • Russian • Spanish • Tagalog • Vietnamese 	<p>CBOs provided small workshops with topics including:</p> <ul style="list-style-type: none"> • Understanding Your Bill • Safety Tips • Level Pay Plan • Energy Conservation • CARE/FERA and Other Assistance Programs • Avoiding Disconnection • Gas Aggregation • High Energy Use <p>Also provided one-to-one education with SCE / SoCalGas customers (4013 were SCE attendees).</p>

3.2.2 *Marketing*

To continue to offer 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 'onsets' – pre-printed newsletter-type communications – with articles providing resources to help reduce their electricity bills.
- Throughout 2017, SCE continued to reach out to potentially eligible customers to enroll them in CARE or FERA, as appropriate. 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.
- As part of the CARE / FERA annual solicitation process in June 2017, SCE included CARE / FERA enrollment applications in the bills of nearly 3 million customers receiving a paper bill (not receiving bills online).
- SCE's Customer Contact Centers continues to utilize the online 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 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 2017, nearly 40,000 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, to enroll the hardest-to-reach customers. Because of these efforts, the Capitation Fee Program continues to show increased enrollments from agencies that were previously inactive. In 2017, capitation contractors successfully enrolled 2,365 new customers in the CARE Program.

3.2.3 *Paid Media (Advertising)*

The 2017 IQP advertising campaign utilized digital banners (desktop and mobile) and Search Engine Marketing (SEM) placements. Digital media ads were placed through Maxpoint, a top-performing advertising network. The campaign generated over 32.2M (million) impressions that targeted Hispanic, Asian, and General Market audience segments.

- SEM targeted all customers throughout the SCE service territory and delivered 353,654 impressions, 18,790 clicks and a 5.31% click-through rate (CTR). As a result there was a 480% increase in SEM CTR performance in 2017 compared to 2016 end year results.
- Desktop display and mobile placements targeted General Market, Asian, and Hispanic segments with a household income less than \$75,000. The desktop and mobile placements delivered a total of 30.6M impressions and 64K (thousand) clicks at a CTR of 0.21%.
- All three social ads exceeded our 2017 CTR benchmark of 1.43%: General Market generated a 2.04% CTR, and Hispanic reached a 2.19% CTR.

3.2.4 *General Market*

The advertising campaign launched November 13 and ran through December 31, 2017. General Market media delivered a total of 12,162,326 impressions, including over 1.2 million impressions that spilled into the African American market.

3.2.4.1 *Digital Summary:*

Creative ran on desktop and mobile platforms:

- Desktop placements delivered 3,631,738 impressions and a CTR of 0.11%.
- Mobile placements delivered 8,530,588 impressions and a CTR of 0.23%.
- Low Income IQP Facebook carousel ad delivered 322,333 impressions and generated a 2.04% CTR (above 2017 click-through rate benchmark of 1.43%).

3.2.5 *Asian Market:*

The Advertising campaign launched November 13 and ended December 31, 2017. Asian media delivered a total of 7,415,348 impressions.

3.2.5.1 *Digital Summary:*

Digital placements were delivered in-language to Cambodian, Chinese, Vietnamese, Tagalog and Korean audiences across desktop and mobile devices:

- Desktop placements delivered 1,297,342 impressions and a CTR of 0.23%.
- Mobile placements delivered 6,118,006 impressions and a CTR of 0.27%.

3.2.6 *Hispanic Market:*

The Advertising campaign launched November 13 and ended December 31, 2017. Hispanic media delivered 11,038,938 impressions.

- Desktop placements delivered 4,549,036 impressions and a CTR of 0.05%.
- Mobile placements delivered 6,489,902 impressions and a CTR of 0.29%.
- The Hispanic (excluding low-income) IQP Facebook carousel was the top performing post. This post garnered 801,332 impressions and reached a 2.88% CTR. The strong performance can be attributed to the large scale which allowed the Facebook AI to best optimize.
- The Hispanic low-income Facebook carousel ad delivered 113,484 impressions and generated a 2.19% CTR (above 2017 click-through rate benchmark of 1.43%).
- The strong performance for the two Hispanic ads can be attributed to their high relevancy scores of 7/10 and 8/10, which means the content resonated strongly with the target audience.

3.2.7 *Owned Media (InsideEdison.com Stories)*

- July 25, 2017: SCE Prescribes Outage Preparedness for Medical Baseline Customers (also in Vietnamese, Chinese, Korean, Spanish, Khmer, Tagalog)
- June 26, 2017: Cool Savings Available to Income-Qualified Customers (also in Vietnamese, Chinese, Korean, Spanish, Khmer, Tagalog)
- May 26, 2017: Five Ways to Save Energy, Money During the Hot Season
- May 19, 2017: Bill Assistance Program Helps Customers in Need (also in Vietnamese, Chinese, Korean, Spanish, Khmer, Tagalog)

3.2.8 *Earned Media*

In 2017, coverage of SCE's income-qualified programs resulted in 25 earned media stories: 11 in Asian media outlets, 6 in Hispanic media, 3 in African American, and 5 in general media:

- **December 20, 2017: Idyllwild Town Crier** –“Prepare and plan for a ‘next’ power outage”

Mentions that Edison tries to inform or alert medical baseline customers ahead of outages, especially maintenance or planned rotating outages,” but added that “these individuals should always be prepared with an emergency plan and be ready to implement it in the event an unexpected outage or power reduction occurs to ensure safety until electricity is restored.”

- **August 29, 2017: Sing Tao Daily** –“Heat Wave May Result in Power Outage, People Who Rely on Electrical Medical Devices Should Have an Emergency Plan”

Reports on how SCE customers with medical needs that depend on electricity-powered equipment can prepare for power outages.

- **August 16, 2017: Viet Bao Daily News** –“SCE Prescribes Outage Preparedness for Medical Baseline Customers”

Reported on how SCE customers with medical needs that depend on electricity-powered equipment can prepare for power outages.

- **August 3, 2017: San Bernardino American News** –“SCE Prescribes Outage Preparedness for Medical Baseline Customers”

Quotes Kari Gardner on SCE’s Medical Baseline program

- **August 2, 2017: El Panamericano (CA)** –“Bill Savings, Vegetation Safety Programs Highlighted”

Article mentions vegetation safety and CARE/FERA programs

- **August 1, 2017: Fresno Bee** – “Is your electric bill too high? These discount programs may help”

Programs available to help Southern Californians find relief from “ballooning power bills from nonstop home cooling” this summer. The article reports SCE “has partnered with local organizations to offer one-time bill payments of up to \$100 for needy households,” while both SCE and Pacific Gas & Electric “offer discounted rates for low-income households.

- **July 31, 2017: KMET AM** –“Gardner Explains SCE Saving Programs”

SCE’s Kari Gardner discusses ways that customers can save money on their summer electric bills and beyond. Gardner mentions the California Alternate Rates for Energy (CARE) and Family Electric Rate Assistance (FERA) programs prominently.

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- **July 23, 2017: KFNY AM** – “Villegas Promotes Water Safety, Conservation and SCE Programs”

The interview also touched on SCE’s income-qualified programs. Robert explained how one-third of SCE’s customers qualify to such programs. He encouraged listeners to check if they qualify for them either via phone or through SCE’s website.

- **July 21, 2017: Sing Tao Daily** – “Cool Savings Available to Income Qualified Customers”

Includes information about CARE/FERA programs and coverage on CARE / FERA bill assistance programs and how customers can keep bills down in the summer.

- **July 14, 2017: Pakistan Link** – “Cool Savings Available to Income Qualified Customers”

Coverage on CARE / FERA bill assistance programs and how customers can keep bills down in the summer.

- **July 13, 2017: Los Angeles Sentinel** – “Bill Assistance Program Helps Customers in Need”

Coverage on the Energy Savings Assistance Program and how income-qualified customers may be eligible for free appliances

- **July 13, 2017: World Journal** – “Electricity Discount Programs to Save 30% Per Month”

Coverage on CARE/FERA bill assistance programs and how customers can keep bills down in the summer.

- **July 13, 2017: CTI-TV** – “SCE Electrical Subsidy Programs...In the Hot Summer, SCE’s Two Money Saving Programs Can Help You Save Money”

Coverage on CARE/FERA bill assistance programs and how customers can keep bills down in the summer

- **July 13, 2017: ZWTV** – “SCE Electrical Subsidy Programs...In the Hot Summer, SCE’s Two Money Saving Programs Can Help You Save Money”

Coverage on CARE/FERA bill assistance programs and how customers can keep bills down in the summer

- **July 7, 2017 : Asian Journal Publication** – “Cool Savings Available to Income Qualified Customers”

Carries a piece originally published on Inside Edison reporting that income-qualified customers may be eligible for free appliances and no-cost installation as part of SCE’s Energy Savings Assistance Program.

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- **July 7, 2017: Korea Times** – “CARE/FERA Programs Help Reduce Your Electric Bills Up to 30 Percent”

Details SCE’s CARE/FERA energy conservation programs that help reduce electric bills, especially during the summer when electricity usage is high. Explains the CARE Program can help income-qualified customers save about 30 percent on monthly electric bills based on their income level, and FERA gives a 12 percent discount on monthly electric bills to qualified households of three or more. The story also included energy conservation tips.

- **July 5, 2017: Viet Bao Daily News** – “Cool Savings Available to Income Qualified Customers”

SCE’s Energy Savings Assistance Program, which offers customers that meet certain income requirements free energy-saving products and services. “With nearly one-third of our customers eligible, we want to ensure that as many qualified households participate and take advantage of these no-cost programs to help lower their energy bills.” said Mark Wallenrod, SCE director of Program Operations.

- **June 20, 2017: KTIP AM** – “Gardner Discusses Summer SCE Bill Assistance Programs”

Gardner explains the ways that SCE helps its customers manage their electric bills through energy-efficiency income-eligible programs as temperatures climb. “I always want to make sure that nearly one-third of our customers who are eligible for these programs are aware of them and know how they can participate.”

- **June 19, 2017: KTIP AM** – “Gardner Discusses Summer Savings, Conservation”

Gardner explains the ways that SCE helps its customers manage their electric bills through energy-efficiency, income-eligible programs as temperatures climb. “I always want to make sure that nearly one-third of our customers who are eligible for these programs are aware of them and know how they can participate.”

- **June 12, 2017: La Prensa Colombiana** – “SCE Bill Assistance Program Helps Customers”

Covers SCE’s ESAP program and quotes Mark Wallenrod, SCE director of Program Operations saying that one-third of customers are eligible for these no-cost programs that will help lower energy bills

- **June 4, 2017: KCEL-FM** – “Villegas Discusses Energy Savings Assistance Program”

SCE’s Robert Villegas elaborates on how customers that meet certain income requirements could be eligible for free energy-saving products and services through SCE’s Energy Savings Assistance Program.

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- **June 4, 2017: KUTY-AM** - “Villegas Discusses Energy Savings Assistance Program”

SCE’s Robert Villegas elaborates on how customers that meet certain income requirements could be eligible for free energy-saving products and services through SCE’s Energy Savings Assistance Program.

- **June 1, 2017: Viet Bao Daily News** – “Bill Assistance Program Helps Customers in Need”

Posted from the "Bill Assistance Program Helps Customers in Need" Inside Edison story

- **May 26, 2017: New Santa Ana** –“SCE Program Offers New Energy-Saving Appliances to Qualified Customers”

Customers can “qualify for a free replacement energy-efficient refrigerator, lighting, cooling system or various energy conservation services” to “save money on your Southern California Edison electricity bill” because of the Energy Savings Assistance Program.

- **May 23, 2017: San Bernardino American News** – “SCE Energy Savings Assistance Programs Help Customers in Need” (link no longer live)

Covers SCE’s ESAP program and quotes Mark Wallenrod, SCE director of Program Operations saying that one-third of customers are eligible for these no-cost programs that will help lower energy bills.

3.2.9 *Social Media (Advertising)*

In 2017, social media was utilized to launch three Income Qualified Program campaigns that promoted the CARE, ESA, FERA, and EAF Programs and also included the Bill Help options for customers.

Customers were made aware of the income-qualified programs through carousel ads on Facebook and Instagram, which directed customers to the Bill Help options on our website.

The ads were in English and Spanish and were launched in November 2017. The combined efforts generated 1,237,149 impressions across Facebook and Instagram on mobile and desktop devices. We launched targeted ads to the following three audiences:

- **General Market + Low Income:** All users in our service territory who were identified by Facebook’s targeting as making an annual income of \$30-40k. The general market low-income IQP Facebook carousel ad delivered 322,333 impressions and generated a 2.04% click-through rate.
- **Hispanic (excluding low-income):** We targeted all users in our service territory who speak Spanish. The Hispanic (excluding low-income) Income Qualified Program (IQP) Facebook carousel ad was the top

performing post. This post garnered 801,332 impressions and reached a 2.88% click-through rate. The strong performance can be attributed to the large audience scale which allowed Facebook to best optimize for audience delivery.

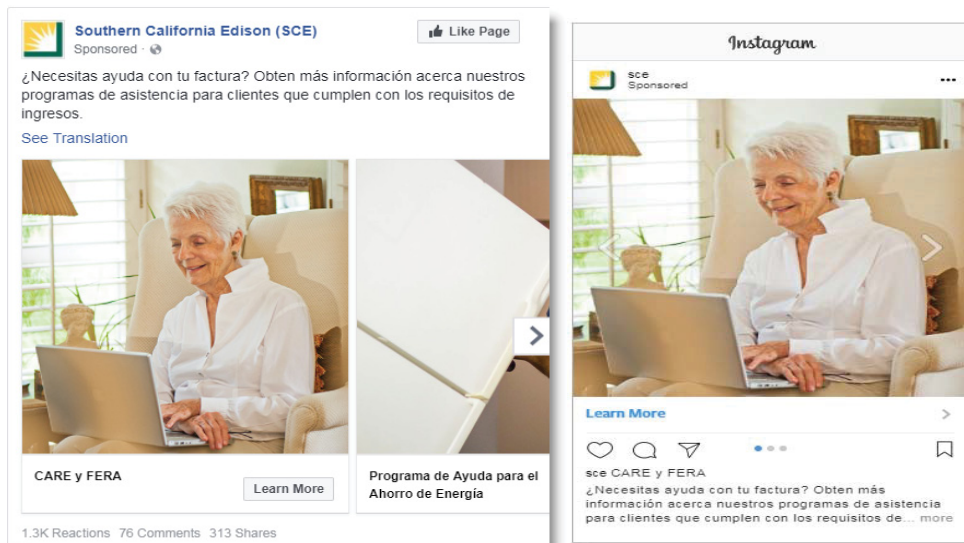
- **Hispanic + Low Income Audience:** We targeted all users who were identified as Spanish speakers and Hispanic by Facebook’s targeting and who made an annual household income of \$30-40k. The Hispanic low-income Facebook carousel ad delivered 113,484 impressions and generated a 2.19% click-through rate.

The performance for all three ads exceeded our 2017 click-through rate benchmark of 1.43%. The strong performance for the two Spanish ads can also be attributed to their high Facebook relevancy scores of 7/10 and 8/10, which meant that the content (text/image) resonated with the targeted audience. We strive to earn at least 7/10 for relevancy scores.

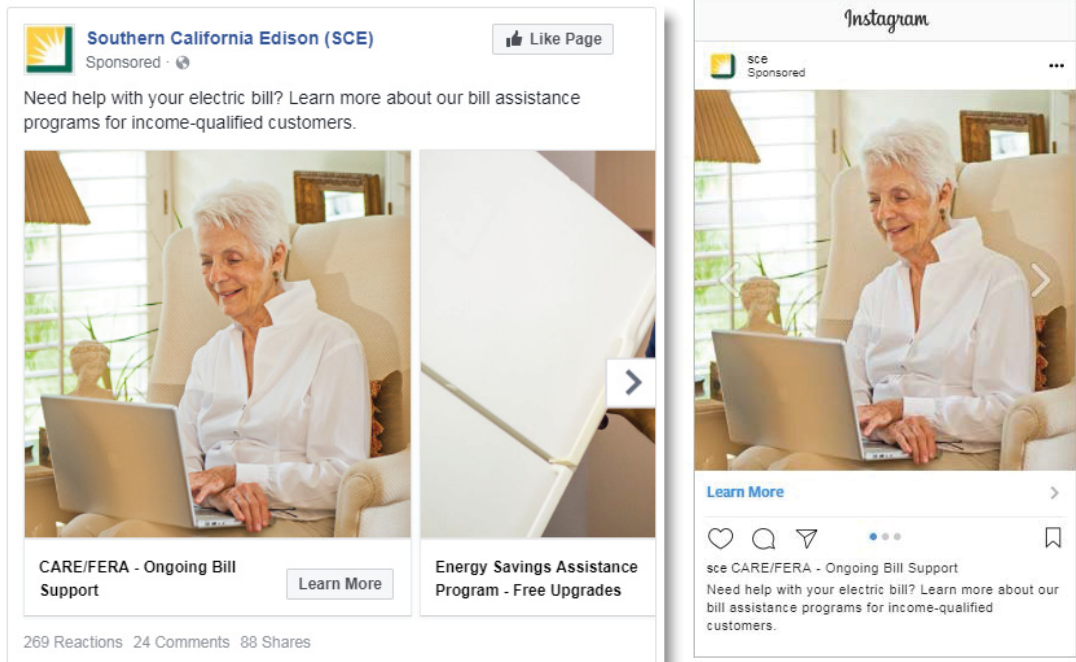
3.2.10 *Income-Qualified Program efforts around ESA and Bill Help:*

For Facebook and Instagram (English and Spanish), we spent \$16,498.78 and received 1,237,149 impressions, including 914,816 impressions for Spanish-language users. The social media advertising effort generated 30,432 website clicks.

3.2.10.1 *English and Spanish Ads for Facebook and Instagram:*



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3.3 Discuss each of the following:

3.3.1 *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.

3.3.2 *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, the benefits of the FERA program do not provide enough incentive for customers to remain on the program. Only approximately half of the customers enrolled in FERA actually receive a discount in any given month. It is more complicated to market a program that may or may not have a benefit and is consequently less appealing to customers.

4. Processing FERA Applications

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

4.1.1 *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 7, below.

Table 7. FERA Self-Certification and Self-Recertification Applications⁶

	Provided ⁷	Received	Approved	Denied ⁸	Pending / Never Completed ⁹	Duplicates
Utility	-	57,417	9,108	46,908	-	1,401
Capitation	-	64	44	19	-	1
Other Third-Party	-	138	5	133	-	-
Total	-	57,619	9,157	47,060	-	1,402

4.2 Processing Random Post-Enrollment Verification Requests

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

See Table 8, below.

⁶ Includes sub-metered tenants.

⁷ Self-Certification applications are distributed and/or /mailed through a wide variety of fulfillment and outreach methods so it is not possible to determine an actual amount. Recertification applications are tracked.

⁸ Denied Self-Certification applications are counted to the CARE Program due to the dual CARE/FERA application.

⁹ Includes cancelled recertification requests and closed accounts.

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Table 8. FERA Random Post-Enrollment Verification Requests^{10, 11}

	Requested	Received	Approved	Denied	Pending / Never Completed¹²	Duplicates
Total	295	286	9	275	2	0

5. Program Management

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

No issues or events significantly affected FERA program management in PY 2017.

¹⁰ Verification process for FERA is the same as for CARE.

¹¹ SCE is reviewing its verification system to determine if it is functioning properly based on the small number of verification requests shown in Table 8.

¹² Includes customers dropped due to non-response, cancelled requests, and closed accounts.