

**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

Application 14-11-009

Application 14-11-010

Application 14-11-011

**SOUTHERN CALIFORNIA EDISON COMPANY'S (U338-E) 2020 ANNUAL REPORT  
FOR 2019 LOW INCOME PROGRAMS**

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Dated: **May 1, 2020**

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**SOUTHERN CALIFORNIA EDISON COMPANY'S (U338-E) 2020 ANNUAL REPORT  
FOR 2019 LOW INCOME PROGRAMS**

Southern California Edison Company (SCE) hereby submits its Annual Progress Report for the Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE) Programs, and its Annual Progress Report for the Family Electric Rate Assistance (FERA) Program for the period January through December 2019. The information in this report supersedes all prior reports submitted by SCE.

Respectfully submitted,

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May 1, 2020

**Attachment 1**

**SCE's ESA and CARE Programs Annual Report for Program Year 2019**



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

**Southern California Edison Company's  
2019 Energy Savings Assistance (ESA)**

**and**

**California Alternate Rates for Energy (CARE)  
Programs Annual Report**

**2019 RESULTS**

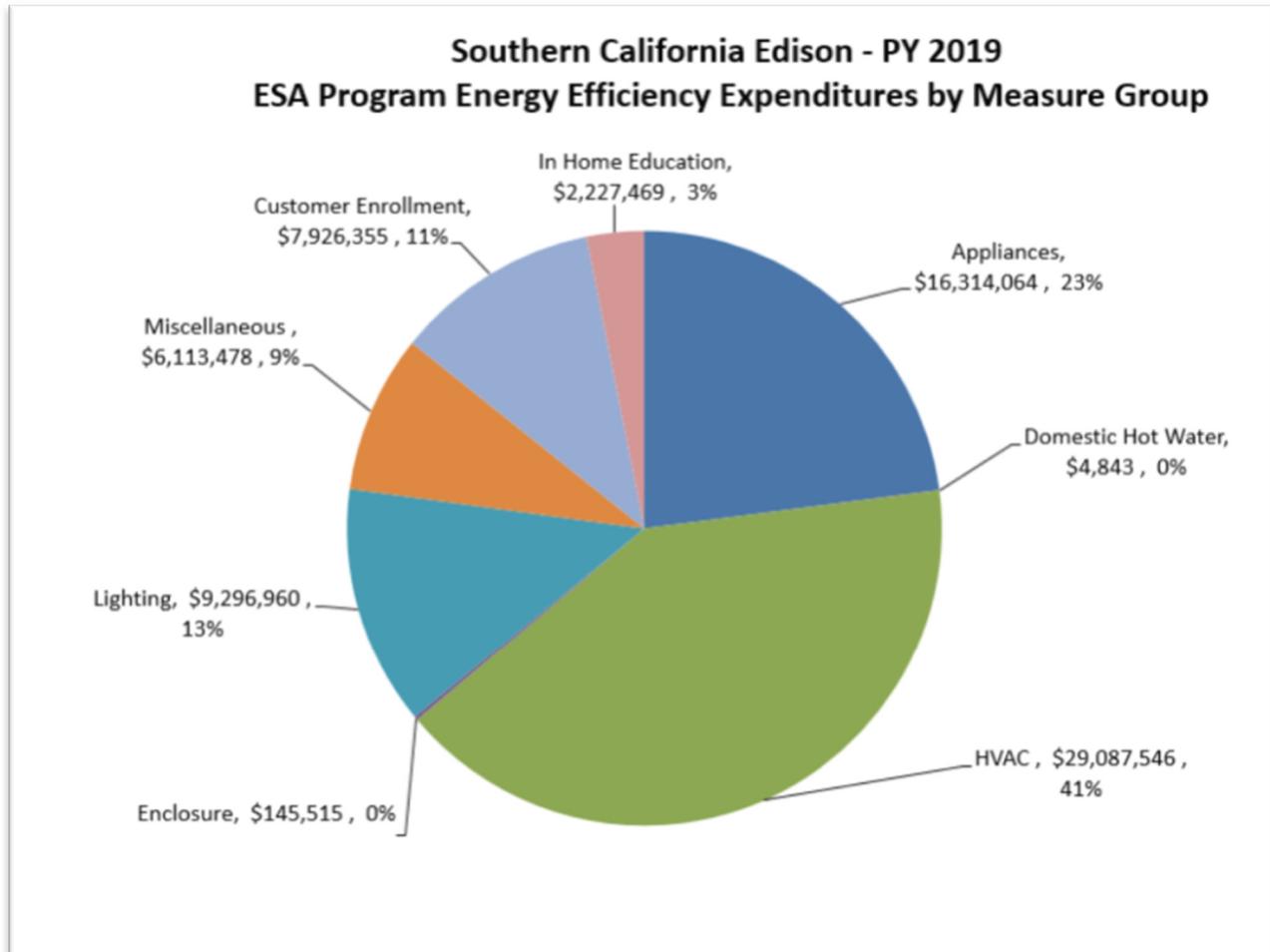
**May 1, 2020**

The tables below summarize the expenditures and activities during Program Year (PY) 2019 for the Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE) Programs.

## 2019 Energy Savings Assistance (ESA) Program Summary

2019	Authorized / Planning Assumptions	Actual	%
Budget	<b>\$63,616,662</b>	<b>\$78,613,898</b>	<b>124%</b>
Funded from 2009-2016 Unspent Funds	<b>\$19,665,599</b>	<b>\$11,745,015</b>	<b>60%</b>
Homes Treated	<b>98,953</b>	<b>95,397</b>	<b>96%</b>
kWh Saved	<b>33,920,000</b>	<b>55,318,996</b>	<b>163%</b>
kW Demand Reduced		<b>7,802</b>	
Therms Saved		<b>N/A</b>	

## 2019 ESA Program Expenditures by Measure Group



## 2019 CARE Program Summary

<b>2019</b>	<b>Authorized Budget</b>	<b>Actual</b>	<b>%</b>
<b>Administrative Expenses</b>	<b>6,791,638<sup>1</sup></b>	<b>\$6,155,745</b>	<b>91%</b>
<b>Subsidies</b>	<b>\$487,221,423</b>	<b>\$365,302,843</b>	<b>75%</b>
<b>Total Program Costs and Discounts</b>	<b>\$494,013,061</b>	<b>\$371,458,588</b>	<b>75%</b>
<b>CARE New Enrollments</b>	<b>Automatically Enrolled via Data Sharing, ESA Participation, etc.</b>	<b>Self-Certified as Categorically Eligible</b>	<b>Self-Certified as Income Eligible</b>
<b>Method</b>	<b>50,796</b>	<b>157,279</b>	<b>94,917</b>
<b>CARE Penetration</b>	<b>Estimated Eligible Participants</b>	<b>Participants</b>	<b>Penetration Rate</b>
<b>Total Enrolled</b>	<b>1,185,146</b>	<b>1,337,092</b>	<b>89%</b>

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<sup>1</sup> Authorized budget approved on January 4, 2019 per Mid Cycle Advice Letter 3824-E-A.

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## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

### 1. Energy Savings Assistance (ESA) Program: Executive Summary

Southern California Edison (SCE) administers the Energy Savings Assistance (ESA) Program in order to serve its low-income customers within its 50,000 square-mile service territory. It is estimated that 1.3 million customers qualify for the program. The program's objective is to help income-qualified customers reduce their energy consumption at no cost to them, while increasing their health, comfort, and safety. For the last 20 years, eligible customers have received energy-efficient appliances such as refrigerators and air conditioners, and services such as energy education, to help their household save energy and money.

The ESA Program is available to all residential customers living in all building types, including single-family homes, multifamily units, and mobile homes. Customers are also eligible whether they are homeowners or renters. As long as the customer has an active account, lives in SCE's service territory, and meets the annual income guidelines established by the California Public Utilities Commission (CPUC), they may enroll in the program. A home assessment is completed to determine specific measures they may be qualified for and check for feasibility.

This report provides information on SCE's ESA Program accomplishments and expenditures for Program Year 2019, during which the ESA Program treated 95,397 income-qualified customers, of which 74,627 were deemed "first touch home treated,"<sup>2</sup> expending 124% of its authorized budget. In addition, the ESA Program saved 43.7 GWh. These savings were achieved by providing a mix of measures and services, including energy education, energy-efficient appliances, and home weatherization. In the coming years SCE seeks to expand its ESA program to offer its low-income customers affordable electric opportunities to assist the state in reaching its greenhouse gas (GHG) reduction goals.

SCE's 2019 ESA Program operated in accordance with direction provided by CPUC Decisions (D.) 16-11-022 and D.17-12-009,<sup>3</sup> which adopted budgets and program directives for the Investor-Owned Utilities (IOUs)<sup>4</sup> regarding their administration of and participation in the California Alternate Rates for Energy (CARE) Program and ESA Program from 2017 through December 31, 2020.

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

The vision of the long-term California Energy Efficiency Strategic Plan (CEESP)<sup>5</sup> is for the ESA Program to have 100% of all eligible and willing low-income customers receive

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<sup>2</sup> Per D.16-11-022 and D.17-12-009, "first touches" are households that have not received ESA treatment, versus "go backs," customers previously treated.

<sup>3</sup> D.16-11-022, Decision on Large Investor-Owned Utilities' California Alternate Rates For Energy (Care) and Energy Savings Assistance (ESA) Program Applications; D.17-12-009, Decision Resolving Petitions for Modification of Decision 16-11-022.

<sup>4</sup> SCE, Pacific Gas and Electric Company (PG&E), San Diego Gas and Electric Company (SDG&E), and Southern California Gas Company (SoCalGas).

<sup>5</sup> California Energy Efficiency Strategic Plan, CPUC, July 2008, updated January 2011.

## **SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020**

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.

SCE aligns its implementation of the ESA Program with this vision and continues to work towards achieving it by the end of the 2017-2020 program cycle.

*Go on to the next page*

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

### 1.1.1 Meeting Goal 1: Improve Customer Outreach

The following table identifies SCE's strategies employed in meeting Goal 1, Improve Customer Outreach.

<b>Implementation Plan and Timeline</b>		
<b>Strategies</b>	<b>Term 2017-2020</b>	<b>IOU strategy employed this Program Year</b>
<b>1.1: Strengthen program outreach using segmentation analysis and social marketing tools</b>	<ul style="list-style-type: none"> <li>Continue to assess and evaluate customer behavior and energy savings; improve upon outreach to eligible communities.</li> </ul>	<p>In PY 2019, SCE continued to:</p> <ul style="list-style-type: none"> <li>Identify neighborhoods with a dense low-income population and low ESA Program penetration and conduct marketing and outreach tactics in those neighborhoods, while partnering and integrating with other Income Qualified Programs (IQP) administered by SCE and carrying out joint enrollments with IOU counterparts.</li> <li>Complied with the emergency response efforts affecting customers residing in high-risk fire areas, including customers in Disadvantaged Community (DAC) and emergency-prone areas, ensuring that the appropriate emergency outreach and marketing tactics were used.</li> <li>Worked with a network of contractors (Community-Based Organizations (CBO), Faith-Based Organizations (FBO), and private organizations) within the low-income communities in SCE's service territory to help leverage ESA enrollments. In 2019 SCE added a new CBO to increase these efforts.</li> <li>Used advanced data analytics and modeling to help increase enrollment rates in the ESA Program.</li> </ul>
<b>1.2: Develop a recognizable and trustworthy Brand and Tagline for the program</b>	<ul style="list-style-type: none"> <li>Evaluate progress and refine strategy.</li> </ul>	<ul style="list-style-type: none"> <li>Provided service providers (contractors) with new collateral to promote the program during events, such as flyers, collateral giveaway materials, and tabletop signs that advertise the ESA Program and IQP brands.</li> </ul>

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

<b>Implementation Plan and Timeline</b>		
<b>Strategies</b>	<b>Term 2017-2020</b>	<b>IOU strategy employed this Program Year</b>
		<ul style="list-style-type: none"> <li>• All ESA Program marketing and advertising campaigns include the ESA Program brand. This ESA brand is included on, but not limited to, all printed materials such as collateral and flyers, targeted mailers, e-mail, social media (Twitter and Instagram), and energy education materials.</li> <li>• SCE leveraged a site established by Southern California Gas Company (SoCalGas) that allows a network of contractors to procure clothing and other materials (e.g., clipboards) with the ESA Program brand.</li> </ul>
<b>1.3: Improve program delivery</b>	<ul style="list-style-type: none"> <li>• Use information from segmentation analysis to achieve efficiencies in program delivery.</li> <li>• Leverage with local, State, and Federal agencies, as well as other organizations, to increase seamless coordination, efficiency, and enrollment.</li> </ul>	<ul style="list-style-type: none"> <li>• Similarly to its tribal outreach efforts in delivering ESA Program services to the community, in 2019 SCE began implementing efforts to serve the military bases in SCE's service territory.</li> <li>• SCE assessed how the ESA Program can be offered to all residential customers on Catalina Island as part of its overall strategy in updating its services to the island.</li> </ul>
<b>1.4: Promote the growth of a trained ESA workforce</b>	<ul style="list-style-type: none"> <li>• Implement ESA Program workforce education and training.</li> <li>• Coordinate ESA Program workforce and service providers with the broader market.</li> </ul>	<ul style="list-style-type: none"> <li>• SCE continued its process of engaging directly with ESA service providers to foster town-hall discussions about their current and future training needs.</li> <li>• The following trainings were offered in 2019: <ul style="list-style-type: none"> <li>• Service provider-led Enrollment and Assessment (E&amp;A)</li> <li>• Back-Office training with webinars</li> <li>• SCE instructor-led E&amp;A Train-the-Trainer, and</li> <li>• CBT software training, which was offered to existing service providers to improve workforce</li> </ul> </li> </ul>

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

Implementation Plan and Timeline		
Strategies	Term 2017-2020	IOU strategy employed this Program Year
		<p>skills and increase program efficiency.</p> <ul style="list-style-type: none"><li>● In June 2019 SCE switched its approach to testing for the Enrollment and Assessment Training Examination. All persons wishing to enroll customers on behalf of the ESA Program must:<ul style="list-style-type: none"><li>● Complete a training session(s) with their respective service provider organizations, and</li><li>● Pass an examination on that material with a score of 80% or greater.</li></ul></li><li>● Before June 2019, candidates were required to attend a scheduled testing session in either Rosemead or Tulare, CA. Working in conjunction with SCE's service provider network to overcome obstacles and barriers, it was determined that an online solution would be more beneficial and would add greater flexibility for both SCE and the service providers. SCE reviewed several online testing systems and in May 2019 selected a vendor that met all SCE's requirements to accomplish moving to an online platform. Since June 2019, all testing for the ESA Program has been conducted online, feedback on the new system has been positive, and SCE will continue this approach for the foreseeable future.</li></ul>

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

### 1.1.2 Meeting Goal 2: ESA as an Energy Resource

The following table identifies SCE's strategies employed in meeting Goal 2: ESA as an Energy Resource.

<b>Implementation Plan and Timeline</b>		
<b>Strategies</b>	<b>Term 2017–2020</b>	<b>IOU strategy employed this program year</b>
<b>2.1: Increase collaboration and leveraging of other low-income programs and services</b>	<ul style="list-style-type: none"> <li>Continue to expand partnerships with stakeholders and seek new opportunities for data sharing.</li> </ul>	<ul style="list-style-type: none"> <li>SCE continued to collaborate with Southwest Gas and share information on homes treated by ESA.</li> <li>In 2019 SCE continued to provide LifeLine Administrator CARE Program participants' customer-specific data on a biannual basis for ESA lead generation.</li> <li>Eleven California Lifeline Providers within SCE's service territory were provided CARE, ESA, CARE Capitation Program, and Energy Assistance Fund (EAF) website links to share and promote at their stores and kiosks.</li> <li>SCE finalized contract with Community Services and Development (CSD) to leverage ESA Program funds with the Multifamily Low-Income Weatherization Program (MF LIWP).</li> </ul>
<b>2.2: Coordinate and communicate between ESA, energy efficiency (EE), and Demand-Side Management (DSM) programs to achieve service offerings that are seamless for the customer</b>	<ul style="list-style-type: none"> <li>Continually reevaluate and update programs to take advantage of new technologies.</li> </ul>	<ul style="list-style-type: none"> <li>During delivery of ESA, where appropriate, SCE provided customers information on SCE's DSM and EE programs, including the Summer Discount Plan (SDP). Additionally, ESA shared HVAC installation data with SDP monthly to: <ul style="list-style-type: none"> <li>Ensure that existing SDP customers who may have been disconnected due to the installation of new equipment are reconnected, and</li> <li>Identify potentially new customers to target.</li> </ul> </li> <li>All HVAC installation customers are</li> </ul>

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

<b>Implementation Plan and Timeline</b>		
<b>Strategies</b>	<b>Term 2017–2020</b>	<b>IOU strategy employed this program year</b>
		<p>provided with SDP information at the time of installation to encourage the customer to take advantage of the Summer Discount Program. By year-end, 463 homes were reconnected to SDP as a result of these efforts.</p> <ul style="list-style-type: none"> <li>Added an additional Single Point of Contact (SPOC) to increase outreach to ESA customers and will continue to integrate and streamline customer enrollment efforts with the Multifamily EE Rebate Program.</li> <li>Coordinated with the Single Family Affordable Solar Homes (SASH) Program contractor to provide leads for low-income households and to ensure that all homes that sign up for SASH were treated or were scheduled to be treated by ESA.</li> </ul>
<b>2.3: Provide low-income customers with measures that result in the most savings in the ESA program</b>	<ul style="list-style-type: none"> <li>Continue to evaluate assess opportunities to incorporate new EE measures into the ESA program, such as plug-load reduction and new HVAC technologies.</li> </ul>	<ul style="list-style-type: none"> <li>Expanded the ESA Program offering by adding smart thermostats and freezers to the ESA measure list.</li> <li>SCE's program design includes measures that increase the cost-effectiveness of the program (LEDs, torchieres, pool pumps, and refrigerators), improve the quality of life of customers (cooling measures), and provide long-term energy savings (refrigerators and cooling measures), and reduce energy bills.</li> <li>Due to the 2015-2017 Impact Evaluation finding of no significant savings resulting from Tier 1 Smart Power Strips, and the need to focus the portfolio on measures providing savings and/or health, comfort, and safety, SCE phased out this measure.</li> </ul>

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

Implementation Plan and Timeline		
Strategies	Term 2017–2020	IOU strategy employed this program year
<b>2.4: Identifying segmented concentrations of customers to improve delivery</b>	<ul style="list-style-type: none"> <li>Continue to evaluate approach and determine whether additional segments are needed.</li> </ul>	<ul style="list-style-type: none"> <li>SCE conducted analysis of non-deed-restricted properties, identified 76 potential properties eligible for Multifamily (MF) Common Area Measures (CAM), and worked with properties for CAM enrollment and in-unit for ESA.</li> <li>Made MF CAM information available on SCE.com and on the CPUC website.</li> <li>In Q2 2019, a Braille version of the Energy Education packet was developed and provided for customers visually impaired.</li> <li>SCE started its partnership with a third party, SignIFICANT Communications, to enhance SCE's outreach to deaf and hard-of-hearing customers.</li> </ul>

### 1.2 Energy Assistance Savings Program Overview

Table 1.2.1 summarizes the ESA Program elements as approved in D.16-11-022 and D.17-12-009:

**Table 1.2.1. Program Summary<sup>6</sup>**

2019	Authorized / Planning Assumptions	Actual	%
<b>Budget</b>	\$63,616,662	\$78,613,898	124%
<b>Funded from 2009-2016 Unspent Funds</b>	\$19,655,599	\$11,745,015	60%
<b>Homes Treated</b>	98,953	95,397	96%
<b>kWh Saved</b>	33,920,000	55,318,996	163%
<b>kW Demand Reduced</b>		7,802	

<sup>6</sup> This is the same ESA Program Summary table shown on Page ii, above.

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

### 1.3 Marketing, Education, and Outreach

#### 1.3.1 Summary of 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 2019, 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. This method entails annual estimation of eligibility for CARE, ESA, and other income-by-household-size parameters and geography (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state.

- Using the 2019 geographic area list of ESA-eligible customers, SCE staggered its marketing efforts throughout the year to address specific neighborhoods (small geographic areas or "ZIP-9s") within SCE's service territory, while continuing to focus the majority of its marketing and outreach (M&O) efforts on CARE customers who had not previously received ESA services.
- In 2019 SCE continued to utilize the existing EMAPS database, which was launched in 2006, to help track program participation, neighborhoods with a dense low-income population, and low program penetration. Marketing and outreach tactics used in various neighborhoods were also tracked in EMAPS to evaluate effectiveness and provide guidance to our contractors, CBOs, and FBOs.

SCE continued to partner with CBOs, FBOs, and private-sector service providers to assess homes and deliver ESA Program services in local communities. The ESA Program aggregated leads in targeted geographic areas and then allocates the leads among service providers.

- In addition to providing leads directly to the ESA service providers in their respective service areas, SCE sent promotional letters to recently enrolled CARE customers and potential ESA customers to inform them that they may qualify for the ESA Program.
- Each monthly campaign focused on specific geographic areas or ZIP codes that the ESA service providers were targeting. This method distributed ESA work throughout the year for each ESA service provider and focused their work in specific communities.

In 2019 SCE used new customer analytics to identify eligible customers and help overcome some of the challenges in enrolling eligible first touch households into the program as further described in **Section 1.3.2**, below.

- In December, SCE onboarded two additional ESA contractors to help increase enrollments and target low-income, ethnic, and non-English speaking communities in the San Gabriel Valley, the city of Santa Ana, Orange County, San Bernardino County, and other areas within SCE's service territory.

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

SCE's outreach contractors continued to canvass targeted neighborhoods to enroll customers in the ESA Program. As a result of those outreach efforts almost 69,000 ESA Program leads were generated that produced 32,139 ESA program enrollments.

A list of current contractors, activities, and actual expenses for SCE's ESA service providers, as well as Women, Minority, Disabled Veteran Business Enterprise (WMDVBE) status is provided in ESA Table 5<sup>7</sup>. Workload management is particularly important when considering that many CBOs and FBOs delivering ESA Program services are small and independently owned.

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

SCE conducted multiple outreach strategies to reach residential customers with both high energy use and energy burden. SCE's Propensity Model Analysis was used to:

- Help identify customers in certain demographics or markets within its service territory who are currently over- or under-represented in ESA participation, and
- Inform SCE how to respond accordingly and to refine its approach to target those customers.

The systematic and focused direct targeting of residential customers for ESA enrollment or treatment employed predictive analytics to identify those who are most likely to be approved for participation in the program. More specifically, the statistical analysis utilizes binary logistic regression models that yield an estimated probability of the household being approved for ESA enrollment or treatment. This estimated probability is based on the unique configuration of such socioeconomic and demographic characteristics such as:

- Income
- Household size
- Child to adult ratio
- Type of dwelling unit (single-family or multifamily), and
- Residential tenure (owner or renter), among others.

This information is obtained from the Axiom vendor provided database. Results of the monthly ESA customer acquisition campaigns serve as a foundation for the refinement of these models to further enhance their predictive capabilities.

SCE also continued to leverage CARE's High Usage customers whose usage was identified as exceeding 400% to 600% (or more) above the baseline. In addition to CARE High Usage customers in 2019, SCE continued to reach out via targeted

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<sup>7</sup> Appendix to ESA and CARE Tables, ESA Table 5 Direct Purchases and Installation Contractors.

## **SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020**

marketing to CARE customers at or above the 90th percentile of usage who had not yet participated in the ESA program. The ESA Program refers these customers to SCE's contractors as leads to enroll these households into the ESA Program and providing energy-saving services.

The ESA Program also included some of these customers in the monthly Direct Mail campaigns to make a connection with them in order to drive conservation and provide monthly savings on the customers' energy bills. In 2019, there were approximately 5,286 Care High Usage leads, of which 1,773 converted to ESA Program enrollments.

The following describes some of the traditional and targeted marketing and outreach activities SCE conducted in 2019 to inform customers about the ESA program:

### **Direct Mail**

In 2019 SCE sent over 774,000 direct mailers to new and existing CARE customers and customers with a high probability of being eligible for the ESA Program. The letters targeted customers who have not participated in the ESA Program, included messaging about the program, and directed customers to the ESA program website. Each letter also provided customers with the name and phone number for their local ESA program contractor, allowing contractors to directly receive information for interested customers. This streamlined process created efficiencies for both the customer and contractor.

Additionally, SCE refreshed the content of its direct mail letter and deployed two versions of a redesigned outer envelope in the Q.3 2019 direct mail marketing campaign. Revising the language in the letter provided more clarity to customers regarding the ESA enrollment process. During the year, the monthly direct mail campaigns generated roughly 19,462 leads and 8,700 enrollments during 2019.

In 2020 SCE will continue to track which version of the outer envelope performed best to test the success of the redesigned envelope.

These illustrations provide a sample of marketing material for direct mail:

*Go on to the next page*

# SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

## Direct Mail Marketing Materials<sup>8</sup>



**SOUTHERN CALIFORNIA EDISON®**  
Energy for What's Ahead®

«Date»

Open the door to free energy-saving appliances and even lower electric bills!



CALL YOUR LOCAL SCE-APPROVED CONTRACTOR TODAY!

«Contractor Name»  
«1-800-999-9999»

Re: Service Account Number ending in «XXX» at «Service Account Address»

Dear «Customer Name»,

Replacing older appliances that use lots of electricity with new energy efficient models can be expensive. However, as a Southern California Edison CARE customer, you may already qualify for our Energy Savings Assistance Program. Whether you own or rent, the program covers all costs for purchasing and installing energy-efficient appliances and services that will help you save energy and money.

- Refrigerator Replacement
- Pool Pump Replacement
- Lighting – LEDs and Torchieres
- Smart Power Strip
- Weatherization
- Evaporative Cooler
- Window or Wall Air Conditioner Replacement
- Central Air Conditioner Replacement

**How it works.**  
Our approved contractor will come meet with you to review the program and guidelines, and will let you know the no-cost energy-saving home appliances and solutions available to you. Don't miss this opportunity for free appliances that use less electricity and may help lower your bill. Call your local SCE-approved contractor below, or visit [sce.com/esap](http://sce.com/esap) for more information.

«Contractor Name»  
«1-800-999-9999»

**Funding is limited and available on a first-come, first-served basis.**  
This program is available to qualified customers absolutely free. So, don't delay. Call your local SCE-approved contractor today.

Sincerely,

*Jill C. Anderson*  
Jill C. Anderson  
VP, Customer Programs and Services  
Southern California Edison

**Energy Savings Assistance Program™**

P.S. Say YES to free energy-saving appliances and enjoy the ongoing savings and comfort of an energy-efficient home. Funding is limited. Act now — call «1-800-999-9999».

The Energy Savings Assistance Program is funded by California utility ratepayers and administered by Southern California Edison under the auspices of the California Public Utilities Commission. Services may not be available in all areas. Certain restrictions, such as age, size, and condition of the system or appliance to be replaced, may apply. Not all contractors meet ENERGY STAR® standards and are top-tier models without extra features, such as ice makers. Services are offered on a first-come, first-served basis until funding is expended or the program discontinued. A co-payment may be required for some services. Program may be modified or terminated without prior notice. California consumers are not obligated to purchase any full fee service or other service not funded by this program. This program is available to both homeowners and renters. Renters may be required to obtain the property owner's written permission before services are delivered. ©2019 Southern California Edison. All rights reserved.



<sup>8</sup> Double-sided English/Spanish.

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

### E-mail

In 2019, SCE deployed 200,929 ESA Program promotional e-mails to customers with a high probability of being eligible for the ESA Program. This included newly enrolled and existing CARE customers who had not previously participated in the program. The e-mail featured ESA Program information and directed interested customers to the ESA Program website to apply online. Over the course of the year, the monthly e-mail campaigns generated almost 4,200 leads and 1,800 enrollments.

### E-mail Marketing Sample

EMAIL: Apply for the Energy Savings Assistance Program. [View details.](#)  
[View this email in Spanish.](#)

 Southern California  
EDISON  
Energy For What's Ahead™

**SAVE MORE WITH FREE ENERGY-EFFICIENT APPLIANCES.**



[Learn More](#)

Dear [Name],

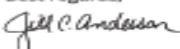
Whether you own or rent your home, you may be eligible to participate in the Energy Savings Assistance Program (ESAP). Under this program, income-qualified customers of SCE can receive free energy-efficient appliances, installation, and services, including:

- Refrigerator Replacement
- Weatherization
- Pool Pump Replacement
- Evaporative Cooler
- Window or Wall Air Conditioner Replacement
- Central Air Conditioner Replacement
- Lighting—LEDs and Torchieres
- Smart Power Strip

These free appliances and services are a great opportunity to save electricity and lower your monthly bill with a more energy-efficient home. Don't delay—this program is available on a first-come, first-served basis.

[Learn More](#)

Best regards,

  
Jill C. Anderson  
Vice President, Customer Programs & Services  
Southern California Edison

**Energy Savings Assistance Program**

DO MORE AT [SCE.COM](#)

[Pay Your Bill](#) | [View/Report Outages](#) | [Turn On/Off Service](#) | [Go Paperless](#)

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To opt out of receiving SCE marketing messages, [unsubscribes](#). Your removal request will be honored within 10 business days.

The Energy Savings Assistance Program is funded by California utility ratepayers and administered by Southern California Edison under the auspices of the California Public Utilities Commission. The program is offered on a first-come, first-served basis and is effective until funding is expended or the program is discontinued. Services may not be available in all areas. Certain restrictions apply. All products must meet the applicable California Energy Commission (CEC) Title 20 and California Energy Efficiency Standards and are top-freezer models without extra features, such as ice makers. In some instances, you may be required to pay a co-payment. Program may be modified or terminated without prior notice.

California consumers are not obligated to purchase any full-free service or other service not funded by this program.

This program is available to both homeowners and renters. Renters may be required to obtain the property owner's written permission before services are delivered.

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## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

### Digital Media

SCE targeted an average of 400 ZIP Codes per month in 2019 as part of the digital and social mass-media plan that ran in Q3 and Q4. Digital Banner and Social Media ads were utilized for their geo-targeting capabilities, to reinforce ESA messaging to eligible customers during key periods when those specific ZIP codes were to be serviced by ESA contractors. The results of the digital media campaigns will be discussed further in **Section 2.5.1.2**, below.

### Outbound Calls

SCE commenced a pilot outreach campaign in Q2 of 2019 to provide customer leads directly to the ESA Program contractors for outbound calls. SCE targeted customers who received the direct mailers each month, focusing on customers who had not previously participated in the ESA Program. By year-end, SCE had provided over 52,000 outbound call leads to multiple ESA contractors that elected to participate in the pilot campaign. In 2019 the outbound call campaigns generated approximately 3,000 ESA Program enrollments.

### Inbound Calls

Customers who called SCE's Customer Contact Center (CCC) were informed and referred and assigned to ESA Program service providers in their area. The ESA service provider then followed up on the lead and contacted the customer to assess eligibility and enrollment in the ESA Program. In 2019 the CCC received over 12,800 ESA-related calls, from which 6,874 customers were successfully enrolled in the ESA Program.

### Innovative Strategies

SCE is constantly evolving to better address the needs of our customers. When unexpected events took place in 2019, such as an earthquake or wildfire, SCE developed disaster relief communications to provide information on important consumer protections available for customers affected by a natural disaster. Additionally, ESA service providers were also provided with disaster relief communications to distribute to the affected areas while conducting outreach.

#### Sample Creative for Disaster-Related Communications

**ATTENTION**

 If you or someone you know has been affected by the Ridgecrest or Trona earthquakes, please visit [sce.com/disastersupport](http://sce.com/disastersupport) for information about consumer protections, programs and services that can assist you.

  
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### **Community Events**

ESA Program contractors participated in various community events in 2019 to inform customers about low-income and other EE programs available to them. **Section 2.5.1** provides additional details on some of the external events in which SCE participated.

### **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, the components of the ESA Program enrollment, assessment, energy audit, measure installation, and inspection services have not changed. SCE's continued to prioritize outreach and program delivery to households that have not yet participated in the Program. SCE implemented the following strategies in 2019 to help increase participation and continued awareness of the ESA Program.

#### **Strategies to Increase Participation**

In 2019 SCE enhanced efforts to reach "first touch" customers who had not participated in the ESA program. These efforts were mainly conducted in hard-to-reach (HTR) communities.

Some of the efforts conducted, which will continue in 2020, include:

- Began onboarding new contractors who would focus on non-English-speaking communities and began preparations to launch an outreach initiative to the deaf community with SignIFICANT Communications, a company that completed a similar effort on behalf of DTE Detroit Energy.
- Began implementation of new contractor strategies to increase enrollment by aligning marketing efforts with service providers' outreach schedules, to improve conversion of customer appointments to enrollments.
- Leveraged other programs and identified co-marketing opportunities by engaging with the implementers of the Solar on Multifamily Affordable Homes (SOMAH) Program and the Disadvantaged Communities Single-Family Affordable Solar Housing (DAC SASH) Program to co-market the programs and better integrate the referral process.
- Targeted enrollments in specified communities, such as customers who reside on military bases and on Catalina Island.
- Continued use of Athens Research<sup>9</sup> studies helped improve identification of under-penetrated areas within SCE's service territory and served as the foundation of planned marketing and outreach efforts. Using the ESA Program's EMAPS database, the program team:
  - Strategically grouped customers based on specific criteria (Climate

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<sup>9</sup> Athens Research, March 18, 2018, Joint Utilities Low Income Working Group: *Documentation for 2017-2018 Estimates of CARE/FERA/ESA Eligibility and Other House Size-By-Income Related Parameters*.

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

Zone, County, City, ZIP Code, etc.)

- Collected customer data in each targeted area through outreach efforts; and
- Tracked the results of each outreach effort.

### 1.3.4 Tracking of 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.<sup>10</sup>

In 2019, SCE prepared to offer smart thermostats to all ESA customers with a working central air conditioning (AC) unit. Previously, the smart thermostat was available only to customers who had received a replacement central AC. This change was made to support efforts under AB 793. SCE also shared a list of smart thermostats installed through the ESA program with the Demand Response Program team for transparency regarding the customers served by the ESA program.

*See Section 1.11, Pilots, below, for additional information on the PCT Pilot.*

A statewide Request for Proposal (RFP) was issued on March 30, 2018. In June 2018, SCE, in collaboration with the other statewide IOUs, selected a load disaggregation vendor, Ecotagious (now Uplight), to develop customer end-use and electric usage profiles. The project scope was divided into two phases.

- Phase 1 produced end-use load profiles and a segmentation report for a sample of low-income customers in the PG&E, SCE, and SDG&E service areas. Phase 1 was finalized, and the customer segmentation design was completed.
- Phase 2 proposed to expand the analysis to a wider group of customers and deliver a summary of results to customers and ESA contractors. The statewide group met biweekly to review and develop the customer-focused Disaggregated Usage Report expected in Q2 2020. SCE continued to develop implementation design and strategy in 2019 and to explore how this usage data can be leveraged in both Demand Response and Energy Efficiency programs.

Furthermore, as directed in D.16-11-022, SCE continued to work with the other electric IOUs to implement the Programmable Communicating Thermostat (PCT) TOU Pilot.

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<sup>10</sup> AB 793 amended §2790 of, and added §717 to, the Public Utilities Code, relating to public utilities.

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

### 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 22% percent of the homes treated in 2019 are classified as "go backs" and/or "retreated." These customers were identified as having previously received services between 2002 and 2019.

**Table 1.4.1 Homes Treated and Go Backs**

No. of Homes Treated in 2019	No. of Service Accounts Treated in 2019 Previously Treated in 2002-2018	Percentage of Go Back Homes
95,397	20,770	22%

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

In 2019, SCE continued to streamline the customer enrollment process and incorporate categorical eligibility and self-certification by conducting some of the following activities:

- CPUC Resolutions M-4833 and M-4835<sup>11</sup> expanded ESA self-certification requirements in counties impacted by the California wildfires. For 2019, under the provisions of the resolution, any customer impacted by wildfires would be allowed to self-certify.
- Learned from SCE's success in its tribal efforts by working with specific communities and offering the program to whole groups in place of individual customer program offerings. Implementing this strategy led to SCE enrolling almost 400 military personnel living in Fort Irwin. Installations for Fort Irwin are scheduled to continue until the first quarter of 2020.
- SCE began preparations to enroll customers on Catalina Island as part of a wider effort to update all SCE services to the island.
- When the ESA Program MF CAM initiative was launched statewide, the Property Owner Authorization and Affidavit (POAA) was created as a statewide form to allow deed-restricted properties that met both benchmarking and income qualifications an easier method of documenting

<sup>11</sup> D.18-08-004, Affirming the Provisions of Resolution M-4833 and M-4835 as Interim Disaster Relief Emergency Customer Protections.

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

income requirements for participation. After reviewing feedback from our service providers, it was determined that a new approach would also need to be found to ease the enrollment process for market rate properties.

- In August 2019 a new MF Income Affidavit (INCA) form was created to allow market-rate (non-deed-restricted) properties with the same basic functionality as the POAA. The INCA form eased the enrollment process by allowing property owners to submit an affidavit to certify the income of their buildings' tenants at 80% of the Federal Poverty Guideline. This gave SCE service providers another tool to ease the enrollment process for multifamily structures.

**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.**

SCE treated more homes in 2019 than 2018 by 4%. However, SCE did not meet its annual homes-treated goal. SCE treated a total of 95,397 homes, 96 % of the goal. Below is a table that shows the number of customers served against the annual goals authorized in the mid-cycle.

**Table 1.4.3: Customers Served vs. Goals**

	Authorized				Actual		
	2018	2019	2020	Total	2018	2019	Total
<b>First Time Treatment</b>	76,784	81,477	84,479	242,540	67,249	74,627	141,876
<b>Retreatment</b>	17,013	17,013	18,290	52,780	19,058	20,770	39,828
<b>Total Households Treated</b>	93,597	98,953	102,769	295,320	86,307	95,397	181,704

SCE continues to experience obstacles enrolling first touch customers in the program. To help meet the 2020 goal, SCE has implemented the following strategies:

- Providing financial incentives for service providers who surpass SCE's identified homes-treated goal
- Increasing marketing mailers to customers
- Updating the EMAPS database to provide leads for service providers to directly contact customers
- Leveraging efforts with the San Joaquin Valley Pilot to enroll eligible pilot customers in the ESA Program

## **SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020**

- Intensifying efforts in the hard-to-reach and disabled communities through innovative initiatives, such as partnering with signIFICANT Communications in outreach to the deaf and hard-of-hearing community, and
- Continuing partnerships with various military bases within the SCE territory so military members can be enrolled in the program.

### **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 to take opportunities to work with disability-related CBOs. Our targeted customer outreach efforts encouraged households to reach out to ESA service providers to schedule an assessment of their homes to determine eligibility for program measures. However, SCE does not specifically inquire if a customer or someone in their household is disabled. A customer may state (self-identify) that they, or someone in their household, is disabled. Alternatively, during the in-home assessment, the service provider representative may learn that someone living in the home is disabled.

The majority of ESA enrollments are noted as SCE Referrals which consist of customers who voluntarily self-identified themselves and/or a household member as disabled, or who were enrolled from the Medical Baseline or CARE programs. See *Table 1.5.3*, below, for information on enrollment of customers with disabilities.

#### **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 outreach (ME&O) efforts continued to identify segments more likely to include disabled customers by collaborating with organizations focused on the needs of the disabled community. SCE leverages disability-related information in its internal account system, so 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, installation and inspection service providers can customize service delivery for households based on their specialized needs.

Additionally, in 2018 SCE developed a version of the statewide Energy Education guide in a large font format, increasing the font sizes for headlines, sub-headlines, and text to allow customers with partial sight to read helpful EE tips provided, and in 2019 developed energy education information in Braille for the blind and visually impaired.

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

Additionally, as previously noted, SCE began onboarding a new contractor, SignIFICANT Communications, to launch an outreach initiative to the deaf community.

### 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**

2019 Disability Enrollments			
Source	Total Enrollments	Disability Enrollments	% of Disability Enrollment
<b>SCE Referral</b>	22,153	3,142	14%
<b>Joint Utility</b>	45,648	25,883	57%
<b>Outreach</b>	27,596	2,456	9%
<b>Total</b>	<b>95,397</b>	<b>31,481</b>	<b>33%</b>
<b>Target Enrollment Rate</b>			<b>15%</b>

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

In 2019 SCE exceeded the 15% overall target enrollment goal by enrolling 33% of the disabled community. Of the three sources, Joint Utility exceeded the 15% target, whereas SCE Referral and Outreach efforts fell short. SCE believes some opportunities were missed to treat homes that may have included members with disabilities, and because of the barriers posed by D.08-11-031,<sup>12</sup> SCE may not ask customers if they are disabled, but instead may only allow customers with disabilities to voluntarily self-identify. As previously noted, SCE will continue to improve its outreach and marketing efforts towards the disabled community and is partnering with SignIFICANT to launch outreach initiatives to the deaf and hard of hearing community.

Despite the challenge of falling short of meeting the SCE Referral goal in 2019, SCE's ESA Program was recognized by the Lincoln Training Center<sup>13</sup> for providing the training center many years of continual work with the processing and fulfillment of the ESA Program's Energy Education Materials. SCE also received an award for its ongoing support of Persons with Disabilities and was recognized at a ceremony hosted by the Inland Empire Caucus of the California

<sup>12</sup> Decision on Large Investor-Owned Utilities' 2009-11 Low Income Energy Efficiency (LIEE) and California Alternate Rates For Energy (Care) Applications, OP 3.

<sup>13</sup> <https://www.lincolntc.org/>.

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Disability Services Association.<sup>14</sup>

### 1.6 Leveraging Success, Including LIHEAP

D.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." SCE's progress are measured by tracking its efforts using the following criteria:

- **Dollars saved:** Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU. Some examples of IOU cost savings are:
  - Shared, contributed, and/or donated resources
  - Elimination of redundant processes
  - Shared and/or contributed marketing materials, and
  - Discounts or reductions in the cost of installation, replacement, and repair of measures, etc.
- **Energy savings/benefits:** Leveraging efforts are measurable and quantifiable in terms of home energy benefits and/or savings to the eligible households.
- **Enrollment increases:** Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

SCE employs leveraging efforts with the SoCalGas and SouthWest Gas utilities, which share portions of SCE's service territory. In the areas jointly served, 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 continues to look for leveraging opportunities with the following service providers that serve other small and multi-jurisdictional utilities' ESA Programs:

- California Community Services Department: Although no projects were completed in 2019, SCE will continue to seek leveraging opportunities with customers served by the CSD's Low Income Weatherization Program (LIWP).
- Implementers of the SOMAH and DAC-SASH Programs: Referral processes established with these implementers have helped leverage customer enrollments in the ESA Program.

#### 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 proactively continues to seek leveraging opportunities for ESA with other low-income programs offered in California. The following are some of SCE's leveraging activities in 2019.

**Community-Based Organizations (CBOs):** SCE continues to work closely with

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<sup>14</sup> <https://www.cal-dsa.org/event/inland-empire-caucus>.

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

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 LIWP and/or the federal Low Income Home Energy Assistance Program (LIHEAP), which allow customers to realize the benefits of multiple low-income programs. SCE has also added another CBO to its contractor network: Community Action Partnership of Orange County.

**Disadvantaged Communities (DAC):** Although not a program, SCE's marketing and outreach efforts continued to include areas identified as DAC areas. While SCE recognizes that every DAC is not a low-income community, these disadvantaged communities are generally populated by low-income residents with environmental and pollution burdens. SCE will continue to work with other departments to integrate ESA communications with other program offerings within these communities.

**Single-Family Affordable Solar Homes (SASH):** GRID Alternatives, the program implementer, continues to partner with SCE by sharing referrals to the ESA program. Specifically, GRID Alternatives provides SCE with a list of homes it has determined to be eligible for SASH treatment. SCE then ensures that the homes on the list are enrolled in the ESA Program and, if they have not been previously enrolled, that they 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 2019.*

**Tribal Communities:** Throughout 2019, SCE conducted various outreach activities with tribal communities in SCE's service territory. The following are some of SCE's year end outreach results:

- Visited the Benton Paiute reservation and distributed SCE fliers and marketing collateral to the residents.
- Attended Colorado River Indian Tribes (CRIT) Tribal Community Resource Fair. Event attendees visited SCE's informational booth and were provided with information on ESA and CARE programs and how they can receive services that will help them save money and conserve energy.
- Met with the Morongo tribe's Temporary Aid for Needy Families (TANF) Department to discuss the ESA Program and provided them with collateral to distribute to the tribal community.

By year-end SCE treated two tribal communities, the Chemehuevi Indian Tribe and members of the Death Valley Timbisha Shoshone Tribe. Three tribes advised us that their residents were not income qualified to participate in ESA per the

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

Federal Poverty Guidelines:<sup>15</sup>

- Twenty-Nine Palms Band of Mission Indians
- Agua Caliente Band of Cahuilla Indians, and
- San Manuel Band of Mission Indians.

The Pechanga community no longer receives their electrical service from SCE.



The following table lists the thirteen (13) tribes identified in SCE's service territory and the current status of our efforts.

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<sup>15</sup> California Public Utilities Code §739.1 (a).

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**Table 1.6.1: Status of Tribal Community Efforts**

<b>Tribal Nations in SCE's Territory Outreach Status</b>	<b>Treated</b>	<b>Ineligible</b>	<b>No longer served by SCE</b>	<b>In progress</b>
Timbisha Shoshone	x			
Chemehuevi	x			
San Manuel Band of Mission Indians		x		
Agua Caliente Band of Cahuilla Indians		x		
Twenty-Nine Palms Band of Mission Indians		x		
Pechanga			x	
Benton Paiute				x
Bishop Paiute				x
Bridgeport Indian Colony				x
CRIT				x
Morongo				x
Soboba				x
Tule River				x

Furthermore, SCE has met the directive issued in D.17-12-009<sup>16</sup> to offer the ESA Program to all tribes in its service territory by 2020. SCE will continue to conduct outreach to offer the ESA program to the remaining tribes and is committed throughout 2020 to continue to confer with the tribal communities.

**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 of leveraging with other external programs are not directly and/or feasibly quantifiable. However, we believe that working with external programs has likely resulted in increased awareness of ESA, which leads to new enrollments. Perhaps more important, leveraging ESA in combination with multiple external programs is also likely to enhance the credibility of marketing for all the 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 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 SoCalGas's

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<sup>16</sup> OP 79.

## **SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020**

ESA Program. This type of leveraging has multiple benefits, including avoiding duplication of effort by reducing the number of contractor visits to a customer's home, and helps prevent additional expenses. This is made possible through the SCE and SoCalGas data sharing tool which ensures that all customers served by both utilities are enrolled.

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

### **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?**

Leveraging with CSD allows SCE to provide its low-income customers with multiple offerings without duplicating services. This includes greater coordination with CSD's LIHEAP and LIWP Programs. SCE and the CSD have continued to employ this leveraging framework to increase participation by LIHEAP agencies that are also ESA Program providers and to record installations of measures common to both ESA and LIHEAP.

In March 2019, SCE finalized an agreement with CSD to leverage ESA Program funds with the MF LIWP. By year-end 2019, however, no projects through this leveraging framework could be identified. Projects completed by CSD in SCE's service territory did not qualify for SCE measure reimbursement under the ESA Program eligibility guidelines (for example, refrigerators to be replaced by CSD were newer than ESA Program feasibility standards required).

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

SCE currently has a memorandum of understanding (MOU) with the Metropolitan Water District (MWD) to explore coordinating our activities. SCE began initial discussions with MWD on opportunities to collaborate, including the possibility of sharing costs on the installation of cold-water measures such as the high-efficiency clothes washers that the ESA Program offers, which we believe would be beneficial to customers. SCE and MWD are also looking into opportunities to better connect water and energy education that would be more meaningful to our shared customers.

SCE plans to continue partnering with MWD beyond the current program cycle and will work to determine if there are other measures that can be included in the collaboration.

## **1.7 Integration Success**

D.08-11-031 states:

"Integration constitutes an organization's internal efforts among its various departments and programs to identify, develop, and enact cooperative

## **SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020**

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."<sup>17</sup>

### **1.7.1 Describe the new Efforts in program year to Integrate and Coordinate the ESA Program with the CARE Program.**

In 2019, the CARE Program identified customer households with 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, per Public Utilities Code (PUC) §739.1. This section:

- Authorizes electrical corporations to require CARE Program participants with excessive energy usage (over 600% of baseline) to enroll in the ESA Program, and
- Also authorizes electrical corporations to require these households, as a condition of their continued participation in CARE, to reduce their energy consumption below 600% or be subject to removal from the CARE Program.

Households with energy consumption exceeding 400% of baseline were also selected to minimize their 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 staff from both ESA and CARE participate routinely in each other's marketing and outreach planning activities and share day-to-day operational information.

In 2019, as directed in Ordering Paragraph(OP) 109,<sup>18</sup> SCE continued to target marketing on CARE customers at or above the 90th percentile of usage who had not yet participated in the ESA Program. SCE continues to track ESA participation for these customers.

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

In 2019, SCE's ESA Program staff worked with SCE's Multifamily Energy Efficiency Rebate (MFEER) Program staff 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 areas of multifamily buildings and included:

- Adding an additional Single Point of Contact (SPOC) to meet the needs of the Program;
- One SPOC will focus on Large Properties in conjunction with MFEER

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<sup>17</sup> § 13.2.1, p. 116.

<sup>18</sup> OP 106, D.16-11-022, was superseded by D.17-12-009, OP 109.

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efforts, and

- One SPOC will focus on Small to Medium Properties.
- Developing SPOCs for property managers and owners:
- Facilitated meeting with MF CAM service providers to ensure that they had identified an in-house SPOC and had enough resources for engaging MF Property owners
- Implemented a layered program approach for property owners and/or managers through the SPOC to reduce confusion
- Educated property owners and/or managers and renters on how to get the most energy savings from the program investment, and
- Began redesign of collateral materials to enable service providers and SCE SPOCs to engage property owners more effectively.

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

In 2019 the ESA Program continued to provide ESA materials to SCE's Local Public Affairs representatives to distribute and discuss during routine meetings with public and government partnership officials. ESA will continue to look for opportunities to integrate the ESA program with EE government partnership programs.

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

Since SCE's ESA Program is a residential program, SCE focuses ESA integration efforts on the EE Residential Programs, as discussed in *Section 1.7.2*, above.

### **1.7.5 Describe the new efforts in the 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, when appropriate, the ESA Program provides information related to DR programs such as the Summer Discount Plan (SDP) during the installation of HVAC replacements. Specifically, customers deemed eligible for HVAC replacement were provided with an application brochure for participation in SDP by installation crew members who explained the benefits of the SDP program to the customer. Additionally, ESA shares HVAC installation data with SDP monthly to ensure that existing SDP customers who may have been disconnected due to the installation of new equipment are reconnected, and to identify potentially new customers to target. As of December 31, 2019, 463 homes were reconnected to SDP as a result of these efforts

In 2019, the ESA Program started sharing a list of customers who received ESA

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smart thermostats with the demand response program teams.

### **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 (CSI) is divided into the Single-Family Affordable Solar Housing (SASH) and Multifamily Affordable Solar Housing (MASH) programs:

- SASH is managed by a third-party program implementer, currently Grid Alternatives, 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 in and take advantage of SCE's Income Qualified Programs as a whole.

SCE continues to depend on the referral process established with these programs to ensure all customers are enrolled in ESA.

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

SCE continued to provide the SASH Program Administrator, GRID Alternatives, with a monthly list of owner-occupied, single-family households that have completed the ESA Program requirements of the CARE Program high-usage process. The referral list contains, at a minimum, the customer-of-record's name, address, phone number, preferred language, household income, and size.

In 2019, SCE provided 123 such referrals to GRID Alternatives. This is an ongoing monthly activity.

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### 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 2019, SCE continued its use of proven strategies to provide training on different aspects of the ESA program to its service provider network, which included installation contractors, CBOs and FBOs, and vendors working in the Program. SCE also continued direct engagement with service providers to 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 training curriculum consists of a two-day, service provider-led training workshop that gives trainees comprehensive instruction on policies and procedures for income documentation, customer eligibility, and measure eligibility. Additionally, program representatives complete training on energy education-related topics. The curriculum is continually updated to include information on other programs and services that will educate and empower customers in ways to reduce energy usage and lower their bills.

During 2019:

- SCE completed *ad hoc* training sessions on a myriad of topics as requested by the service providers to help ensure that their training needs were met.
- 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 at the same time.
- SCE continued its partnership with SoCalGas to offer free online software training to employees of ESA service providers through the Computer Based Training (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 purchase any software to gain and refine skills for that course.
- In February 2019, SCE once again hosted representatives of ESA Program service providers at an all-day Training Summit and Contractors Meeting to discuss their current and future training needs in a town hall setting. This included a presentation by SCE on its training plans for the remainder of 2019 and facilitated discussions to share ideas for program

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improvements. SCE plans to continue this direct engagement with ESA service providers in future program years.

During 2019, SCE and SoCalGas also continued the practice of reviewing existing ESA Program internal processes 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.

Additionally, in SCE's November 4, 2019 Application for the 2021–2026 Program Cycle, SCE proposed upcoming changes to add the WE&T Program as a stand-alone component of SCE's low-income portfolio offerings. The WE&T Program will focus on training and educating workers in historically underserved areas such as DACs, while continuing to support a robust labor pool for the wider industry, comprised of qualified contractors. Further updates will be provided in SCE's ESA-CARE Annual Report for Program Year 2020.

### **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 and FBOs, are situated in low-income and disadvantaged communities and provide jobs within these communities. As of December 31, 2019, these organizations provided approximately 855 jobs that supported the ESA Program. SCE's training includes:

#### **Enrollment and Assessment (E&A) Training:**

- Offered to new employees hired by the service providers and required before these employees may conduct customer enrollment, income verification, and home assessment activities. Trainees also receive instruction on different approaches to the delivery of energy education. Service providers conduct their own training with curriculum materials developed and provided electronically by SCE, although testing on the training is managed by SCE's ESA Program Training and Compliance advisor.
- During 2019 SCE facilitated three sessions to assist smaller service provider organizations with their training needs, which also served as a "train-the-trainer" opportunity for the larger service provider organizations.

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### **CBT Learning System (Computer Skills Training):**

- Offered to existing and new service provider employees. The CBT Learning System is licensed from a third-party vendor and provides online, internet-based training on basic computer skills and tools such as Microsoft Word, Excel, and PowerPoint. In 2019 39 individuals utilized the system, completing 143 courses that accounted for 154.98 hours of structured learning.

### **E&A Testing Sessions:**

- As part of the Enrollment and Assessment (E&A) Training; individuals who participated in training workshop(s) to become badged authorized to perform in-home assessments, must first take and successfully pass an exam at 80% competency.
- In June 2019, SCE migrated from In-Person testing at our offices in Rosemead or Tulare to an Online Examination. The online approach provides greater flexibility in scheduling exams, reduces exam costs, and removes the need for individuals in outlying areas to travel to complete the exam.

**Table 1.8.2. Employees Trained**

Course/Training Event	Number of Participants
CBT Learning System	39
Enrollment and Assessment Training – SCE Led	71
SCE E&A Testing Session – In Person	146
SCE E&A Testing Session – Online Testing	181

## **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.**

SCE completely phased out CFLs in the ESA Program and only offered LED bulbs in 2019. The LED bulbs comply with the California Energy Commission's LED lamp specification requirements.

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

Although the ESA Program no longer offers CFLs, the in-home energy education program for customers includes information about special handling and the proper disposal of CFLs.

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### **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.**

Table 15 is no longer applicable because it was specific for CFLs and SCE did not offer CFLS in 2019.

### **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.**

D.16-11-022 authorized the following studies:

- 2019 Low Income Needs Assessment (LINA)
- Impact Evaluation of the Energy Savings Assistance Program, and
- Non-Energy Benefits study.

Activity for 2019 associated with these authorized studies is provided in Appendix to ESA and CARE Program tables, ESA Table 17

##### **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). The authorization to conduct the fourth Needs Assessment was included in Decision 17-12-009. The 2019 LINA was discussed at an LIOB subcommittee meeting on August 1, 2018. Data analyses began during 2018 and continued through Q3 2019. A draft report was completed, and the results were presented at a public workshop on November 14, 2019, after which parties were invited to provide comments. The final report, issued in December 2019 and posted on CALMAC<sup>19</sup> included the following primary topics:

- Increasing our understanding of the eligible customers who are not currently enrolled in the CARE Program in order to facilitate enrollment. This topic was bifurcated into two main sources of inquiry:
  - An examination of recertification and income verification processes to facilitate post-enrollment processes and the retention of eligible customers, and
  - An exploration of eligible enrolled CARE customers and never-enrolled customers to understand overall barriers to participation and to increase initial enrollments.
- Understanding more about whether and how to select measures offered by

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<sup>19</sup> <https://pda.energydataweb.com/#!/documents/2308/view>.

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the ESA Program Mediate Health/Comfort/Safety (HCS) Hardship.

- Understanding more about the energy burden on and hardships of customers who have no access to electricity or natural gas and rely on wood, propane, diesel, or other fuels.
- Understanding the energy burden on and hardships of customers who reside in areas that have less reliable energy performance as indicated by the System Average Interruption Duration Index / System Average Interruption Frequency Index (SADIE/SAFIE).

Regarding the first objective, the study found that post-enrollment processes, including recertification, verification, and high usage verification, are removing ineligible and retaining eligible customers as anticipated. At the same time, the study identified limitations of these processes based on a significant number of potentially eligible customers removed (up to 50%) as part of the post-enrollment processes.

- Relative to other post-enrollment processes (such as recertification and high usage verification), more eligible customers are removed during the income verification process.
- While those who are removed tend to demonstrate less economic hardship than those retained, communication materials and processes regarding requirements and removal processes can continue to be modified to retain more eligible customers.

The study also reiterated findings from prior studies suggesting immigrants and non-English speaking customers were not significantly less willing to participate in CARE than other types of low-income customers. At the same time, while 76% of those aware of CARE expressed interest in CARE (for SCE), 24% of the eligible nonparticipants remained unaware of the CARE program, suggesting the value of continuing to raise customer awareness of the program. The greatest barriers for those who are already aware of CARE enrollments are:

- Inconvenience (28%)
- Lack of knowledge about how to enroll (19%)
- Tried to apply in past but were ineligible (14%)
- Uncertainty over eligibility (14%), and
- Lack of need for CARE (9%).

Regarding the health, comfort, and safety benefits of select heating and cooling measures offered by ESAP, customers report greater comfort after having received the measures. Health and safety improvement reports are less common. Customers who receive heating and cooling measures in conjunction with enclosure measures report the most significant impacts. The research suggests additional education may increase the benefits and the persistence of the health, comfort, and safety benefits.

Inquiry with customers currently using alternative fuels such as propane and wood for space heating, water heating, and/or cooking suggests that these

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customers experience greater energy burdens and economic hardships due to the cost of propane and wood relative to natural gas. Not having access to natural gas is the most reported reason for the use of propane.

Finally, regarding reliability-related issues: the research found minimal differences between the CARE population who experience these issues and CARE customers who do not experience them. Customers with relatively lower reliability tended to have a higher energy burden, but this was owing to lower income as opposed to differences in, or higher, energy bills.

No additional activities are expected for this project. There were no issues or problems encountered during the course of the study. The full report is available at both the CALMAC<sup>20</sup> and CPUC Public Document Area<sup>21</sup> websites.

### 1.10.1.2 Statewide ESA Energy Savings Impact Evaluation

The most recent ESA Program impact evaluation (for the 2015-2017 PYs) was conducted during 2017-2019. The Energy Division and the IOUs jointly developed a scope of work for the evaluation, which included lessons learned from methods used in prior evaluations that employed billing analyses. The scope of work was included as part of a Request for Proposals (RFP).

DNV-GL was awarded the contract; the study began in 2017. The study was initially expected to be completed in one phase, but given program needs for early results, the study was broken into two phases:

- Phase I used program data from 2014-2016 to establish the modeling framework and provide (preliminary) results for the Advice Letters filed by the IOUs mid-cycle on July 16, 2018 per direction from the Energy Division.
- Phase II included the addition of 2017 program year data as well as some modifications to the modeling framework.
- The draft results from Phase II were provided in March 2019 and used in preparing the ESA applications for the 2021-2026 program cycle.
- A public workshop to present results and gather stakeholder input was held on April 8, 2019, and the report was finalized and posted on the CALMAC website<sup>22</sup> on May 10, 2019 (and is also available on the CPUC Public Document Area website).<sup>23</sup>

Although SCE's *ex post* results were more closely aligned with the *ex-ante* estimates, the final results reflected overall declines in energy savings across the

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<sup>20</sup> [http://www.calmac.org/publications/2019\\_LINA\\_Final\\_Report\\_Vol\\_1\\_Summary\\_of\\_Key\\_Findings\\_-\\_12132019.pdf](http://www.calmac.org/publications/2019_LINA_Final_Report_Vol_1_Summary_of_Key_Findings_-_12132019.pdf).

<sup>21</sup> <https://pda.energydataweb.com/#!/documents/2308/view>.

<sup>22</sup> [http://www.calmac.org/publications/2015-2017\\_ESA\\_Impact\\_Evaluation\\_-\\_FINAL\\_-\\_CALMAC\\_Posting.pdf](http://www.calmac.org/publications/2015-2017_ESA_Impact_Evaluation_-_FINAL_-_CALMAC_Posting.pdf).

<sup>23</sup> <https://pda.energydataweb.com/#!/documents/2173/view>.

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IOUs. The results were used as inputs in developing *ex ante* savings estimates for the post-2020 ESA Program and measures.

The time constraints that required breaking the study into two phases also ultimately required the removal of additional *ad hoc* tasks included to improve understanding of anomalies in the data, such as negative results and/or differences across IOUs. The report's recommendations included the need to look more closely at planning assumptions and potential non-energy benefits to better explain results and improve overall program savings projections.

Unlike the case for previous studies, the consultant did not translate *ex post* savings into *ex ante* estimates to be used in the upcoming application. Instead, the IOUs coordinated in an effort to identify reasonable *ex ante* estimates to allocate to measures during program planning. No additional activities are expected for this project.

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

The scope of work for the ESA Non-Energy Benefits study was developed in consultation with the Cost-Effectiveness Working Group authorized in D.16-11-022. The project was expected to:

- Provide updated NEB estimates that may be used in cost-effectiveness tests
- Recommend potential new NEBs and/or removal of irrelevant NEBs, and
- Include a simplified Excel based tool to calculate NEBs moving forward.

The study used existing (and often very old) secondary data and research to update the inputs and calculations of the existing NEBs.

A draft report was circulated to stakeholders posted in July 2019, and a public webinar was held on August 2, 2019 to present results and solicit input. The Final Report was released on August 30, 2019 and is available on the CPUC Public Document Area website.<sup>24</sup>

In doing this work, the study exposed the limitations of secondary research to provide updated values relevant to the ESA Program. In many cases, the most recent estimated values found were from studies over ten years old. Furthermore, many of these studies involved programs in states with different climates (for example, Wisconsin and Connecticut) or different measure mixes that diminished their relevance for the ESA Program. Ultimately, 46 NEBs were recommended to include in the ESA cost-effectiveness test. Moreover, 24 new NEBs were created, and six existing NEBs were recommended for removal from the original model developed in 2001.

### ESA Portion of the Statewide Energy Efficiency Potential Study

For the first time, modified inputs were included in trying to assess the low-income energy potential within the 2019 Energy Efficiency Potential & Goals

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<sup>24</sup> <https://pda.energydataweb.com/#!documents/2295/view>.

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(P&G) Study conducted by Navigant. A bottoms-up approach was used to forecast the savings potential of the ESA program. The study commenced in December 2018 and the final report was completed in July 2019. The study results reflect small savings potential for the ESA Program.

Many of the assumptions and models used in the energy efficiency sector were used in calculating savings for the ESA program. Because there are some inherent differences from the low-income program, the results of the EE potential study may not accurately reflect the ESA Program's technical or market potential.

### **Rapid Feedback Research and Analysis**

This study is not a statewide study. The authorized funds were provided to each IOU independently to provide the opportunity for smaller projects or specific, more time-sensitive analyses that may be of value but were not specifically stated in D.17-12-009. SCE did not use the funds in 2019 but plans to use these funds in 2020 to support a statewide Non-Energy Benefits follow-up project.

#### **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 EE proceeding. Studies are required to solicit public input on research and deliverables via workshops or webinars and the CPUC's Public Document Area (PDA) website. Parties are encouraged to submit written comments on the work before and/or after the public meetings, to be posted on the PDA website. Notice of the public meetings are sent to subscribers on the PDA website and to the applicable service list.

Beyond the authorized studies, any additional studies or analyses commenced via the ESA Program Rapid Feedback and Analysis funding adhere to 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 2019 no rapid feedback studies or analyses were initiated by SCE.

#### **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.**

The proposed study budgets are included in ESA Table 17, Expenditures for Pilots and Studies.

### **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 SCE, PG&E, and SDG&E to propose a Programmable Communicating Thermostat Time-of-Use Pilot, aligned with the

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recommendations in Appendix A of D.16-11-022. SCE filed a Tier 2 Advice Letter (3753-E) on March 1, 2018, as directed by D.17-12-009, proposing an implementation plan and requesting supporting budget. The general goal of the pilot is to evaluate whether using a Programmable Communicating Thermostat (PCT or "smart thermostat") paired with a mobile phone application will affect the behavior of low-income, high-energy-usage customers in hot climate zones while on a Time-of-Use (TOU) rate.

On March 27, 2018, ED suspended the Advice Letter for additional staff review. On April 14, 2018, at the direction of the ED, SCE filed a supplement to the Advice Letter to clarify SCE's proposed budget. The ED also directed the three electric IOUs to jointly hire one consultant to evaluate the pilot. These changes — the suspension of the Advice Letter, the addition of new contract requirements, and the direction to coordinate using a joint statewide contractor — prompted the IOUs to submit a request for a time extension, which was approved, changing a June 2018 launch date to October 2018.

In the second half of 2018 the three IOUs selected Evergreen Economics as the joint evaluation contractor. SCE identified low income customers most likely to be high users due to air conditioner use in the two hottest climate zones (Zones 14 and 15), contracted with a firm to perform outbound recruitment calls, and designed printed customer materials such as TOU welcome kits. Out of over 10,000 potential participants, and with a goal of recruiting 300 participants, 174 customers agreed to participate in the pilot.

Evergreen divided those 174 customers into two matched groups of 87 customers each: the Treatment Group would receive an Ecobee brand PCT, and the Control Group would instead receive a payment approximately equal to the value of the installed PCT. Both groups agreed to respond to three surveys administered at key points throughout the pilot. Pilot evaluation results would be based on qualitative data collection through three surveys augmented by AMI data analysis. The primary objectives were:

- To determine if the PCTs are useful tools in helping customers shift usage away from the TOU peak, and
- To understand customer interaction and satisfaction with the PCT device.

To reinforce the description of the pilot provided verbally during the outbound calling recruitment, SCE followed up in December 2018 by designing and mailing TOU rate welcome kits, tailored for the pilot, for both the Treatment and Control groups.

SCE contracted with an HVAC ESA contractor to schedule installation appointments with the Treatment group and complete the installations of the Ecobee PCTs by the end of January 2019. Of the 87 Treatment group customers who had agreed to participate in the pilot, 36 agreed to the installation, and had Wi-Fi and HVAC systems compatible with the PCT.

The first of three surveys, for baseline responses, was administered to both groups in December 2018 and early January 2019. Throughout January, SCE switched

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the pilot participants to a TOU rate on their respective meter read dates, with a peak pricing period of 5:00 p.m. – 8:00 p.m.

The joint IOU evaluator issued interim pilot findings in April 2019 based on the IOU's recruitment, enrollment, and installation experiences, and the results of the first participant survey. Interim pilot findings are summarized as follows:

- Customers were generally disinterested in the device, contributing to lower participation than anticipated, and
- Low-income housing stock and equipment tend to be older than those found in the general population, making installation feasibility and device compatibility challenging.

In July 2019 the PCT manufacturer notified the IOUs that software setup errors associated with the PCT devices resulted in gaps in gathering the thermostat operational data. Software required for the PCTs to automatically shift load away from the TOU rate's 5:00 p.m. – 8:00 p.m. peak times had not been installed during manufacturing. By mid-August the manufacturer was able to gain customer authorization and push the software update to 32 of SCE's 36 installed pilot PCTs. To adjust for this unexpected software event and to maximize learnings from the pilot, the IOUs worked closely with the pilot evaluator to make adjustments to the surveys and research plan.

The second participant survey was administered in November 2019 after all customers had received and (likely) paid all their bills covering the typically hottest months of the year, June through October. In December the IOUs provided the Treatment and Control groups' hourly AMI usage data for January through November 2019 to the evaluator, to be analyzed and reported in the final report. The third and final survey was scheduled to be administered in Feb 2020. A webinar presenting findings scheduled to take place before the end of March 2020, followed by the release of the evaluator's final report.

### **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.**

The PCT TOU Pilot final report is due end of Q.3 2020.

*See **Section 1.11.1**, above, for an overview of the pilot, and Table 17, Expenditures for Pilots and Studies, for pilot expenses paid and authorized.*

### **1.12 "Add Back" Measures**

**For measures that fall below the cost-effectiveness threshold under D.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

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Table 16. These measures were "added back" by the Commission in Attachment I to the D.14-08-030 guidance document.<sup>25</sup>

### **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 authorized the ED to form Working Groups to yield a fair, informed, balanced, and productive review of issues that a working group must review. Following is a summary of authorized Low Income Working Groups describing their activities.

### **1.13.1 ESA Cost-Effectiveness Working Group (CEWG)**

The Cost-Effectiveness Working Group (CEWG) completed its deliverables in 2018 and was not active in 2019.

### **1.13.2 Multifamily Working Group (MFWG)**

The Multifamily Working Group (MFWG) was established to provide input on program design and on the implementation strategy of integrating Multifamily Common Area Measures (MF CAM) into the ESA Program, as specified in D.16-11-022 and D.17-12-009.<sup>26</sup>

The MFWG held four quarterly meetings in 2019, along with a few *ad hoc* meetings. Its members include, but are not limited to:

- CPUC Energy Division
- The four California IOUs
- Natural Resources Defense Council (NRDC)
- Community Housing Opportunities Corporation (CHOC), and
- California Housing Partnership Corporation (CHPC).

Some of the highlights were:

- Discussing the potential of MF projects listed on the Tax Credit Allocation Committee website, and
- Reviewing the IOUs' plan on the analysis of non-deed-restricted multifamily properties.

The MFWG has developed an Annual Progress Report, which describes its 2019

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<sup>25</sup> 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).

<sup>26</sup> D.16-11-022 and D.17-12-009, OP 62, 63, and 64.

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activities and is available online at [www.energydataweb.com](http://www.energydataweb.com).

### 1.13.3 Mid-Cycle Working Group (MCWG)

The MCWG completed updates to the ESA Statewide Installation Standards Manual and it was released in November 2019.

### 1.13.4 CARE Restructuring Working Group

The 2015 Residential Rate Proceeding<sup>27</sup> initiated a Phase 3, which, among other things, ordered:

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

Decision 19-09-004, Addressing Phase 4 Issues, was issued on Sept. 18, 2019, specifically addressing a proposal for restructuring the California Alternate Rates for Energy (CARE) Program.

"... the Commission finds that the CARE Program should not be restructured at this time.... The Commission seeks to ensure that essential levels of service are affordable and that customers are not overburdened by monthly energy expenditures. To that end, the Commission is currently examining in other proceedings issues of affordability, disconnections, and what constitutes essential usage of electricity service. To the extent that additional data and information gathered in these and other proceedings indicate that an alternative CARE structure may better address these issues than the current structure, the Commission may revisit the issue of CARE restructuring in the future.... No alternative CARE structure should be adopted at this time."<sup>28</sup>

SCE will continue to participate in any required workshops or activities to advance this effort.

**Note:** *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 ED staff, and after consultation with the working group, SCE filed a joint motion on behalf of parties to suspend 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. This suspension of the schedule was necessary due to parties' focusing on other priorities associated with R.12-06-013, and because the IOUs had recently concluded discussions with parties and the ED to finalize a consensus dataset, which is essential for further consensus-building*

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<sup>27</sup> D.15-07-001, p. 298.

<sup>28</sup> D.19-09-004, pp. 16-17 and 23.

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*discussions on potential CARE restructuring and reform concepts and measures.*

*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 (DAWG)**

D.17-12-009<sup>29</sup> identified the Demand Analysis Working Group, which includes representation from the California Energy Commission (CEC), California Independent System Operator (CAISO), IOUs, and other interested stakeholders. The DAWG acts as the forum for providing input into the scope, modeling, and analysis of results associated with the Energy Efficiency Potential and Goals Study. There was no low-income activity for 2019.

### **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, the Energy Division, the ALJ, or the Commission.

In compliance with D.12-08-044, SCE and the other IOUs held a public meeting via Webinar on June 27, 2019, to present and discuss their 2019 CARE, FERA and ESA Program highlights and activities.

### **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.**

D.17-12-009 approved ESA unspent funds to treat common areas of deed-restricted multifamily (MF) properties where 65% of the tenants are income-eligible for ESA. In 2019, SCE completed an analysis of all non-deed-restricted MF properties within its service territory. The primary objective of this analysis is to assess the potential energy savings in non-deed-restricted MF properties with a high percentage<sup>30</sup> of low-income tenants and determine if the ESA Program should expand its provision of common area measures (CAM) to support these MF properties in the future.

SCE's analysis included identifying all multifamily properties within the service territory and benchmarking energy consumption. This approach allowed SCE to conduct a comparison among non-deed restricted properties (and deed-restricted properties, which are out of scope), utilizing a common set of data. The analysis

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<sup>29</sup> D.17-12-009, OP 8.

<sup>30</sup> The definition of an MF property with a high percentage of low-income residents is: A property with at least 80% of households at or below 200% Federal Poverty Guidelines (FPG).

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used account and parcel data to calculate the energy use intensity (EUI) of kilowatt-hour (kWh) consumption per square foot and the benchmarking scores for each MF property.

The analysis identified 76 non-deed-restricted properties<sup>31</sup> in areas where at least 65% of the estimated population are at or below 200% FPG. These properties were identified by overlaying the current Athens Research data. The properties were found to have an average of 17,573 square feet and a total 2018 annual consumption of 440,172 kWh, of which 48,827 kWh was attributed to common areas and 391,345 kWh was attributed to residential units. In 2019, these values are still valid, and SCE feels that updating the values is unnecessary for the program year as SCE is not treating non deed-restricted common areas but is providing to in-units services through the traditional ESA Program.

SCE also checked previous ESA Program participation and time of last retrofit against MFEER, as shown in the table below:

Year Last Treated	Properties Treated through ESA	Properties Treated through MFEER
2002	1	0
2004	1	0
2006	1	0
2008	1	0
2009	1	0
2010	2	0
2011	0	0
2012	2	0
2013	2	0
2014	1	1
2015	7	4
2016	4	2
2017	12	2
2018	16	3
2019	23	0
Never Served	2	62
No Data found	0	2
<b>TOTAL</b>	<b>76</b>	<b>76</b>

<sup>31</sup> SCE deemed properties as deed-restricted if they were listed on the Affordable Housing Rental Directory page of the California Department of Housing and Community Development website.

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In addition, these properties had a higher EUI when compared to the remaining population of MF properties (see Table 1.15.1, below). As a result of this analysis, SCE targeted these properties in 2019 to gather additional data on ESA Program measures and services provided for individual dwelling units in order to identify potential opportunities for common area spaces.

**Table 1.15.1. Energy Use Intensity for Non-Deed-Restricted Properties**

% at or below 200% FPG	Model Predicted Energy Use Intensity (EUI)		Number of Properties
	MEAN	MEDIAN	
< 30%	11.78	11.49	10,995
30% to 64%	13.78	12.95	18,835
≥ 65%	16.56	16.43	76

### 1.15.2 Coordination with the California Advanced Services Fund's New Broadband Public Housing Account

D.17-12-007<sup>32</sup> required SCE to investigate coordination with the new Broadband Public Housing Account of the California Advanced Services Fund (CASF) to promote deployment of high-quality advanced communications services to all Californians, including those residing in public and multifamily housing. SCE reached out to the California Foundation for Independent Living Centers (CFILC) in 2018 to explore the feasibility of developing a joint mailer targeting low-income SCE customers who could qualify for CFILC's low-cost internet program, and met with CFILC in Q1 2019 to continue conversations regarding leveraging efforts. SCE will continue to further develop these efforts in 2020.

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<sup>32</sup> OP 42.

## **2. California Alternate Rates for Energy (CARE) Annual Report**

### **2.1 CARE Executive Summary**

SCE's California Alternate Rates for Energy (CARE) Program provides a monthly energy bill discount that reduces bills between 30 and 35 percent for customers who meet the program requirements, namely:

- Either that a customer's household income is under the Federal Poverty Guidelines (FPG),
- Or the customer is enrolled in a qualifying categorical program.<sup>33</sup>

Eligible residential customers reside in single-family households, sub-metered residential facilities, nonprofit group living facilities, agricultural employee housing facilities, and migrant farm worker housing centers. In SCE's service territory approximately 1.2 million households are enrolled in CARE, out of an estimated eligible 1.3 million households, an 89% enrollment-to-eligibility ratio.

This annual report provides information on SCE's CARE Program accomplishments, extensive outreach efforts, and expenditures for the 2019 program year. At the end of the year 1,185,146 customers were on the CARE rate, resulting in a penetration rate of 89%. CARE enrollment decreased from 1,205,539 on December 31, 2018, to 1,185,146 on December 31, 2019, which represents a net decrease of 1.7%. SCE continues to work towards meeting the Commission's directed CARE Program goals and objectives.

In 2019, SCE continued to target areas of program improvement to better serve CARE customers better. SCE led a statewide effort to change the requirement for customers to provide IRS transcripts for CARE High Usage Post Enrollment Verifications (HU PEV) from mandatory to *optional*. By removing the mandatory IRS transcript requirement, HU PEV customers have more options and flexibility for fulfilling their income documentation requirements, ultimately increasing the likelihood of a customer complying with HU PEV requirements.

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<sup>33</sup> The list of eligible programs is available at <https://www.sce.com/residential/asistance/care-fera>.

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### 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 2019	CARE Customers	Percentage Change
January	1,203,474	-
February	1,205,310	0.15%
March	1,204,124	-0.10%
April	1,192,387	-0.97%
May	1,191,541	-0.07%
June	1,189,421	-0.18%
July	1,185,026	-0.37%
August	1,191,085	0.51%
September	1,177,046	-1.18%
October	1,189,540	1.06%
November	1,183,050	-0.55%
December	1,185,146	0.18%

- 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 2019. This method entails annual estimation of eligibility for CARE, ESA, and other income-by-household-size parameters and geography (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

The requirements for 2019 eligibility, corresponding to the current estimates, again used the January 2019 Health and Human Services (HHS) Poverty

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Guidelines,<sup>34</sup> "bundling" one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327.

Sources for the estimates include:

- The current HHS guidelines
- Current-year, small-area vendor marginal distributions on household characteristics
- Census 2010 SF3 data
- Census American Community Survey 2014-2018 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.

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 were 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 data, Integrated Public Use Microdata Survey data, American Community Survey data, and California Employment Development Department county and Metropolitan Statistical Area-level labor force series data. This adjustment to block group income marginal distributions is then incorporated into the otherwise "standard" estimation approach to produce small-area estimates reflecting small-area income changes due to labor market forces.

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 level.

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," which for CARE 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 on a monthly basis. The CARE household total, including individually metered and sub-metered occupied housing units, is divided by the total income and demographic eligibility.

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% FPG), tenure, and fuel payment relationships. These cross-classifications are fitted to small-area (block group) marginal distributions to produce payer-type specific distributions, which can be aggregated to various other geographical levels.

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<sup>34</sup> Federal Register / Vol. 83, No. 12 / Thursday, January 18, 2018 / Notices; p.2643.

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### **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 2019.

### **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 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 **Section 2.2.2**, above. 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 individually metered or sub-metered. Block group utility-specific estimates are then disaggregated or 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, and
- CARE enrollment and recertification dates.

In the case of sub-metered tenants receiving the CARE discount from their master-metered facilities, SCE runs a separate report to count the number of sub-metered dwelling units flagged as being enrolled in CARE.

### **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: 29.6%

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- Gas: N/A

The estimate of current demographic CARE-eligible rates by energy source at year-end is 29.6%.

### **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, as of December 31, 2019, is 56,868.

### **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 28,210.

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

Electric: The current CARE sub-metered penetration rate by energy source, as of December 31, 2019, is 50%.

### **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 in increasing tenant enrollments and recertifications than was the previous tactic of solely approaching mobile home park owners and/or managers.

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 billing period, as well as providing customers with the ability to identify any possible discrepancies in the number of eligible tenants for that billing period.

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### 2.3 CARE Program Summary

#### 2.3.1 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)	\$2,964,235	\$2,964,235	100%
Processing, Certification, Recertification [1]	\$911,857	\$911,857	100%
Post-Enrollment Verification	\$600,000	\$581,473	97%
Information Tech./Programming	\$190,337	\$103,094	54%
Pilots	\$525,000,	\$357,043	68%
Measurement and Evaluation	\$–	\$0	0%
Regulatory Compliance	\$542,704	\$364,378	67%
General Administration	\$722,943	\$722,943	100%
CPUC Energy Division Staff	\$140,000	\$122,234	87%
Cooling Centers	\$44,562	\$28,488	64%
Total Expenses [1]	\$ 6,791,638	\$6,155,745	91%
Subsidies and Benefits	\$487,221,423	\$365,302,843	75%
Total Program Costs and Discounts	\$494,013,061	\$371,458,588	75%
[1] Represents the authorized budget approved on January 4, 2019 per AL 3824-E			

#### 2.3.2 CARE Program Penetration Rate to Date

**Table 2.3.2. CARE Program Penetration**

Participants Enrolled	Eligible Participants	Penetration rate	Target Met
1,185,146	1,337,092	89%	No

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### **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.**

In 2019, SCE received a total of thirteen (13) CARE recertification complaints. As reported in SCE's Low Income Monthly Report, below are SCE's reported complaints and how SCE worked with customers to resolve their requests.

#### **January 2019:**

- Consumer Affairs continued to work with a customer who, after failing to recertify his CARE eligibility, was removed from the rate. Customer contacted SCE stating they did not receive recertification notifications. Review of the customer's account revealed multiple e-mail addresses. SCE and the customer worked together to assign only one single e-mail address for future communications. Customer was sent a recertification request to return to SCE.

#### **February 2019:**

- SCE worked with a customer who after failing to recertify CARE eligibility was removed from the rate. SCE investigated the matter and notified the customer the CARE discount would be retroactively rebilled. The customer was placed back on the CARE rate and was satisfied with the outcome.
- SCE worked with a customer who had called the CPUC and voiced concerns that the recertification form was too long and complex to complete. SCE walked through the process with the customer, and upon review notified the customer that the recertification was properly completed and provided the customer with the effective date. The customer was satisfied.
- A customer contacted SCE after being removed from the CARE rate. The record indicated that the customer had failed to respond to three renewal notices. The customer was notified that enrollment was also available through the IVR. The customer's attempt to enroll was unsuccessful again. The record indicated that the customers' CARE discount was nominal due to low bill amounts. SCE assisted the customer with CARE enrollment and provided EAF and HEAP information, and the customer was satisfied with the outcome.
- A customer was removed from the CARE rate due to failure to recertify. This customer called SCE confirming submission of necessary documents. SCE notified the customer they would be placed back on the CARE rate pending approval of the recertification.

#### **March 2019:**

- SCE worked with a customer who was removed from the program for failing to complete CARE recertification. After three months not on the CARE rate, the customer completed CARE recertification via the VRU

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and was re-established on CARE. The customer requested retroactive billing for the three months not on the program and the request was denied. The customer is back on CARE and has not contacted SCE again.

- A customer was removed from CARE after failing to respond to several recertification requests. The customer called SCE the following month, claiming that income documentation had been provided for CARE recertification. SCE notified the customer income documentation was not necessary for recertification and that the customer could recertify online. The customer completed online recertification four months after being removed from the program, then contacted SCE requesting a retroactive billing adjustment for the months not on CARE. This was denied. The customer is back on the program and has not contacted SCE again.

### **April 2019:**

SCE did not receive any recertification complaints in April.

### **May 2019:**

- A customer was removed from the CARE program due to not providing recertification documents. The customer indicated that documentation was submitted multiple times and when SCE tried to contact the customer to resolve the matter, the phone number provided was incorrect. After further research SCE was able to make contact and advised the customer that the account would remain on CARE with no lapse. The customer was satisfied with the outcome.
- A customer was removed from the CARE program for not providing recertification documentation. The customer indicated they called SCE multiple times to request recertification forms and did not receive the requested documents. SCE worked with the Customer over the phone to complete the recertification and advised the customer we would conduct research to determine if the customer could receive a retroactive credit.

### **June 2019:**

SCE did not receive any recertification complaints in June.

### **July 2019:**

- SCE worked with a customer who indicated having tried to apply for the CARE program multiple times, but when the customer called to check status, received a message that the request was pending. SCE investigated request and helped the customer apply for CARE program.
- A customer was removed from the CARE rate for failing to recertify. The customer stated they tried to recertify online and did not receive the requested form. SCE investigated and confirmed an application was mailed to the customer with instructions on sending back the completed form. The customer was placed back on the program upon receipt of the customer's completed form.

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### **August 2019:**

SCE did not receive any recertification complaints in August.

### **September 2019:**

- A customer contacted SCE to complain of having difficulty recertifying over the phone and requested a recertification form to be sent in the mail. The customer then called SCE back indicating that the paper form had not been received. SCE assisted the customer by completing recertification over the phone. The customer was satisfied with the outcome.

### **October 2019:**

SCE did not receive any recertification complaints in October.

### **November 2019:**

- A customer called concerned about being removed from the CARE program due to receiving multiple letters requesting recertification. SCE investigated and confirmed that the account was active and no action from the customer was needed. The customer was notified and satisfied with the outcome.

### **December 2019:**

SCE received no recertification complaints in December.

## **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 \$25.43.

#### **2.4.1.2 State the Annual Subsidy (Discount) for All CARE Customers by Energy Source**

- Electric Subsidy: \$365,302,843.
- Gas Subsidy: None.
- The annual subsidy (discount) for all CARE residential program customers was \$365,302,843.

#### **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.**

In 2019 the number of CARE customers on GTSR was 200 and the percentage was 11%. SCE no CARE customers enrolled in the Enhanced Community Renewable Program.

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The average total bill discount of CARE-enrolled GTSR customers received (in percentage terms) from the CARE Program discount on the delivery portion of their bill: 14%.

The average total bill discount of CARE-enrolled GTSR customers received (in percentage terms) from the CARE Program overall discount on their bill: 27%.

### 2.4.2 Administrative Costs

#### 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 Categories

The requested information is provided in **Table 2.4.2**, following:

**Table 2.4.2. CARE Administrative Cost Categories**

Category	Description
<b>Outreach</b>	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.
<b>Processing, Certification, and Recertification</b>	Includes: Staff labor, information technology, application processing, training, programming labor, and sub-meter certification.
<b>Post Enrollment Verification (PEV)</b>	Includes: Staff labor, information technology, verification processing, training, programming labor, and sub-meter verification.
<b>Information Technology (IT) / Programming</b>	Includes: Programming and labor costs associated with system enhancements, Decision compliance, and maintenance of existing processes.
<b>Pilots</b>	Includes: Cost of Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) program.
<b>Cool Centers</b>	Includes: Refreshments and personal cooling devices for Cool Center attendees, and system updates for geolocation webpage.
<b>Measurement &amp; Evaluation</b>	Needs Assessment Study
<b>Regulatory Compliance</b>	Includes: Applications, testimony, advice filings, comments and reply comments, hearings, reports and studies, working group meetings, public input meetings, and tariff revisions.

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Category	Description
<b>General Administration</b>	Includes: Office supplies, market research, program management labor (including pensions and benefits), and technical support and software licensing.
<b>Commission Energy Division Staff Funding</b>	Includes: CPUC Energy Division Staff expenditures.

### 2.4.3 Year-End (December 31, 2019) Balance for the CARE Balancing Account

- Electric CARE: \$15,013,855
- 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, 2019 was \$15.0 million.

### 2.4.4 Cost Categories Recorded in the CARE Balancing Account and 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.02-09-021<sup>35</sup> 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.

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<sup>35</sup> 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 (2019)**

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
<b>Residential<sup>36</sup></b>	\$8,973,308	\$386,517,942	2.3%	\$107,679,693	28.4%
<b>Agricultural</b>	\$576,192	\$15,748,274	3.7%	\$6,914,302	1.8%
<b>Commercial</b>	\$17,687,790	\$436,890,652	4.0%	\$212,253,481	55.9%
<b>Industrial</b>	\$2,752,635	\$44,928,219	6.1%	\$33,031,620	8.7%
<b>Public Authority</b>	\$1,624,335	\$36,932,134	4.4%	\$19,492,024	5.1%
<b>Railroads</b>	\$30,115	\$688,297	4.4%	\$361,376	0.1%
<b>Interdepartmental<sup>37</sup></b>	\$225	\$22,332	1.0%	\$2,704	0.0%
<b>Totals</b>	\$31,644,600	\$921,727,849	3.4%	\$379,735,198	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, under-penetrated and hot-climate-zone areas continued to be a priority in 2019. SCE's CARE and FERA Programs partner with internal SCE departments such as Public Affairs, Consumer Affairs, Marketing, Corporate Communications, Community Involvement, and Speakers Bureau, and with employee volunteer-based Resource Groups. These programs also partner with external organizations, such as foundations, Faith-Based Organizations, and Community-Based Organizations, in outreach activities that target SCE's hard-to-reach customer base.

SCE's goal is to enroll as many eligible customers as are willing to participate in CARE.

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<sup>36</sup> Excludes CARE customers.

<sup>37</sup> Electricity supplied for Edison-owned water & gas operations on Santa Catalina Island.

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Following are descriptions of some of SCE's internal and external outreach activities SCE conducted in 2019:

### **Internal Outreach:**

In 2019 SCE's Customer Contact Center (CCC) used various methods to directly enroll customers in the CARE Program during incoming calls to the center, such as the following:

- When a customer calls CCC, to make a new customer turn-on requests,<sup>38</sup> or
- When a customer expresses a need for help with their bill, or
- When a customer expresses financial hardship.

The Customer Service Representative (CSR) will first offer to take the CARE enrollment over the phone, or if the customer so requests, will directly transfer the customer to the Information Voice Response (IVR) system. The IVR allows customers who prefer a self-service option to enroll in CARE via SCE.com. Alternatively, if requested, the CSR may send a paper Rate Discount Application form to the customer.

These enrollment options provide customers with choices and maximize their opportunity to enroll in CARE. By year-end 2019, SCE had enrolled more than 108,000 eligible customers through CCC outreach efforts including web, phone, and mail-in enrollments.

In 2019, the CARE program sent 1.7 million direct mailers to non-CARE customers who might be eligible to enroll in the rate-discount program, based on advanced customer data analysis to target those with a higher likelihood to be eligible. Each targeted mailer included a letter showing the CARE income qualifications for enrollment, a self-addressed, postage-paid return envelope, and a Rate Discount Application that was pre-filled with the customer's information to make applying easier.

Additionally, D.19-07-004<sup>39</sup> mandated that SCE target up to an additional 300,000 CARE- and FERA-eligible customers located within hot climate zones to increase awareness of and enrollments in the program. By the end of 2019, SCE had met this compliance mandate by sending close to 400,000 additional direct mailers to customers in hot climate zones.

Illustrations of the 2019 CARE creative (direct mailers) are shown below.

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<sup>38</sup> CARE is offered to **all** new customers turn-on requests.

<sup>39</sup> Decision (D.)19-07-004, Phase IIB Decision Addressing Residential Default Time-of-Use Rate Design Proposals and Transition Implementation.

# SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

## Sample Direct Mailer (English/Spanish)

A preview of the direct mailer content. It includes:

- Southern California Edison logo and "Energy for What's Ahead" tagline.
- A placeholder for the mailing date: «Date».
- A yellow callout box: "GET A DISCOUNT OF ABOUT 30% ON YOUR ELECTRIC BILL EVERY MONTH."
- A photograph of a family in a kitchen.
- Text fields for "Customer Name", "Mailing Address 1", "Mailing Address 2", "City, State Zip+4", and a redacted phone number.
- A service account number ending in "XXXX".
- A message to the customer: "Dear Valued Customer, We understand everyday expenses can change and how these changes can affect some households more than others. That's why rates like our California Alternate Rates for Energy (CARE) can help make a difference."
- A section titled "LOWER YOUR ELECTRIC BILL BY ABOUT 30% EVERY MONTH!" with a note about CARE participation.
- A note about CARE discounts: "Remember, your CARE discount of about 30% will be applied to your electric bill month after month, so the savings really add up."
- A section titled "IT'S EASY TO APPLY AND ONLY TAKES A FEW MINUTES." with three application methods: envelope return, website, and phone.
- A section titled "YOU MAY ALSO QUALIFY FOR FREE APPLIANCES AND MORE." with a note about the Energy Savings Assistance Program.
- A table titled "Maximum Household Income" showing income thresholds for different household sizes.
- A note explaining the income thresholds: "Current gross (before taxes) household income from all sources. Households of three or more persons may have incomes above those listed and still qualify for CARE, may qualify for the Family Electric Rate Assistance program."
- A signature of Jill C. Anderson.
- Credit line: "Jill C. Anderson  
VP, Customer Programs and Services, Southern California Edison".
- Small print at the bottom: "The California Alternate Rates for Energy program is funded by California utility customers and administered by Southern California Edison under the auspices of the California Public Utilities Commission. This program will continue until funding is exhausted or the program is terminated, whichever comes first. Program is subject to change without notice. Terms and conditions apply." and "The Energy Savings Assistance Program is funded by California utility ratepayers and administered by Southern California Edison under the auspices of the California Public Utilities Commission. The program is offered on a first-come, first-served basis and is effective until funding is expended or the program is discontinued. Services may not be available in all areas. Certain restrictions, such as age, size, and condition of the system or appliance to be replaced may apply. In some instances, you may be required to pay a copayment. California consumers must own their home to receive full new service or other service not funded by this program. This program is available to both homeowners and renters. Renters may be required to obtain the property owner's written permission before services are delivered."
- Copyright notice: "© 2019 Southern California Edison. All rights reserved."

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

### Sample e-mail (English with Spanish option)

Vinnie, get a CARE discount of about 30% when you qualify. [View online.](#)  
[Ver este mensaje en español.](#)

 SOUTHERN CALIFORNIA  
EDISON®  
Energy for What's Ahead™

**LOWER YOUR ENERGY BILL BY ABOUT 30%.**

[Learn More](#)



Dear Vinnie,

We understand that everyday expenses can have an impact on your household. That's why we offer some helpful ways to lower your monthly bill and conserve energy. You could get about 30% off your energy bill with the California Alternate Rates for Energy (CARE) program, or you may qualify for the Family Electric Rate Assistance (FERA) program.

If your household meets the current income requirements, or if someone in your household participates in any of the listed [public assistance programs](#), you are qualified and can apply now.

CARE and FERA are just some of the many ways we are dedicated to providing affordable and reliable electricity for your home.

It's easy to [find out if you qualify](#) and apply online today.

[Learn More](#)

If you or someone you know has been affected by the Ridgecrest or Trona earthquakes, please visit [sce.com/disastersupport](#) for information about consumer protections, programs and services that can assist you.

Best regards,

  
Jill C. Anderson  
Vice President, Customer Programs & Services  
Southern California Edison

**DO MORE AT SCE.COM**

Pay Your Bill | View/Report Outages | Turn On/Off Service | Go Paperless

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This email contains a marketing message from Southern California Edison.  
To opt out of receiving SCE marketing messages, [unsubscribe](#). Your removal request will be honored within 10 business days.  
Programs are funded by California utility customers and administered by Southern California Edison under the auspices of the California Public Utilities Commission. This program will continue until funding is exhausted or the program is terminated, whichever comes first. Program is subject to change without notice. Terms and conditions apply.  
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## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

### Digital Media

SCE continued to target unique ZIP codes where direct mail was sent to eligible households. As part of the digital and social mass-media plan, Digital Banner and Social Media ads are used for their geo-targeting capabilities to reinforce CARE messaging to eligible customers during key periods.

In 2019, approximately 715,000 e-mails were deployed to customers with a "high probability" of being eligible for CARE. The e-mail featured CARE program information and directed interested customers to the CARE pages of SCE.com to enroll.

### Capitation Fee Program

The CARE/FERA Capitation Fee Program team is continuing its efforts to engage existing Capitation Agencies while strategically registering additional contractors to overcome enrollment barriers, including language, culture, and special needs, and enroll the hardest-to-reach customers. Because of these efforts, the Capitation Fee Program continues to show enrollments from agencies that were previously inactive.

SCE currently has 61 CARE Capitation Agencies who help income-qualified customers receive assistance through CARE and FERA. By year-end 2019, capitation contractors and outbound calling efforts successfully enrolled close to 900 new customers in the CARE Program. Ongoing campaign strategies and efforts included:

- Leveraging events sponsored by communities and cultural celebrations to reach populations that may be eligible to enroll in the CARE Program.
- Partnering with SCE personnel to leverage existing SCE relationships with FBOs, CBOs, and local governments.
- Using existing channels to develop creative approaches for agencies to conduct CARE/FERA outreach, including community-based outreach events and fairs.



### External Outreach

In 2019 SCE hosted outreach at various community events throughout SCE's service territory. These events provide SCE an excellent opportunity to interact with the communities and provide them a wealth of information on the programs and services available to them.

Additionally, SCE partnered with Organizational Support Services (OSS), a third

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

party that conducts customer outreach at various community events with SCE or on SCE's behalf. Partnering with OSS, SCE participated in more than 480 community events, some of which included Black History Month, Asian American Pacific Islander Month, and Hispanic Heritage Month events, county fairs, senior community centers, city festivals, and a three-day auto show. Nearly 22,000 event attendees received information about SCE's ESA, CARE and FERA programs and other available energy efficiency and demand response programs.

As part of its ongoing data-sharing efforts to generate leads for California LifeLine program participation in 2019, SCE bi-annually provided electronic files containing close to 1.2 million records of CARE Program participants' customer-specific data to the Energy Division to transmit to the LifeLine Administrator.

SCE also provided the following California Lifeline Providers within SCE's service territory with direct links from the CARE, FERA, and ESA Program pages of its public website, SCE.com, to the main Lifeline enrollment web page:

- Access Wireless
- Assurance Wireless
- enTouch Wireless
- FeelSafe Wireless
- Life Wireless
- Ready Wireless
- SafeLink Wireless
- SafetyNet Wireless
- StandUp Wireless
- Tag Mobile LLC, and
- TruConnect.

This allows SCE customers to get Lifeline program information by simply clicking a link. In addition, website links can be used to share and promote programs at stores and kiosks.

SCE will continue to collaborate with Lifeline and discuss additional leveraging efforts.

### 2.5.1.1 The CHANGES Pilot Program

The Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program was initially approved by the Commission as a one-year pilot program.<sup>40</sup> D.15-12-047 approved the establishment of the CHANGES program as an ongoing statewide program, effective January 1, 2016.<sup>41</sup> The program provides outreach, education, and billing issue assistance to limited-English-proficient customers. The program is administered through a contract with the CPUC, using the same community contractor, Self Help for the Elderly, and 28 CBOs that also administer the CPUC's Telecommunications Education and Assistance in Multiple-Languages (TEAM) program.

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<sup>40</sup> Approved November 19, 2010, Resolution CSID-004

<sup>41</sup> D.15-12-047 p.1

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

*Note: Please note that CHANGES services were not provided from May 1-June 16, 2019, due to a delay in contracting procedures. Therefore, no data for that time period is reflected below.*

The CHANGES CBOs during the pilot in SCE's service territory were:

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

The Resolution directed 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, and/or one-to-one technical assistance for customers on various topics, such as avoiding disconnections, payment arrangements, assistance programs available, how to read a utility bill, tiered rates, and energy conservation.

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

- **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.

In 2019, based on the program administrator's monthly reports, CHANGES completed the activities shown in Table 2.5.1-a, below for SCE:

**Table 2.5.1a Activity: Disputes Resolved by Service**

Service	Disputes Resolved
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	5
Bill Adjustment	2
Changed 3rd Party Company	0
Changed 3rd Party Electricity Aggregation	0
Consumer Education Only (must be pre-approved)	0
Energy Assistance Program Assistance	12
Enroll in Energy Assistance Programs	5
Medical Baseline Application	7
Payment Extension	28
Payment Plan	202
Request Bill Adjustment	1
Request Customer Service Visit	0
Request Meter Service or Testing	2
Schedule Energy Audit	1
Solar	24
Stop Disconnection	179
Time of Use	0
Wildfire Related Issue	0
<b>TOTAL</b>	<b>468</b>

**Note:** The total number of services may exceed the total number of cases because some cases will include more than one service provided.

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

**Table 2.5.1b Activity: SCE Disputes Resolved by Language**

Language	Disputes Resolved
Armenian	1
English	142
Laotian	3
Spanish	94
Tagalog	17
Vietnamese	1
<b>TOTAL</b>	<b>258</b>

**Note** Language count may be fewer than services provided because some cases receive more than one service.

**Table 2.5.1c. Activity: Needs Assistance: By Service**

Needs Assistance Type	Disputes Resolved
Add Level Pay Plan	0
Assisted High Energy User with CARE Doc Submission	1
Assisted with CARE Re-Certification/Audit	24
Assisted with Changes to Account	23
Assisted with Reconnection	6
Billing Language Changed	2
CARE Enrollment	24
Consumer Education Only	0
Electricity Aggregation	0
Energy Alerts	0
Energy Assistance Fund (SCE)	43
Energy Assistance Fund (PG&E)	0
Energy Efficiency Tool	0
Enrolled in Demand Response Programs	0
ESAP	22
Gas Assistance Fund (SCG)	41
HEAP	358
Medical Baseline	16

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

Needs Assistance Type	Disputes Resolved
Neighbor to Neighbor (SDG&E)	0
Payment Extension	56
Payment Plan	41
REACH	1
Report Scam	1
Reported Safety Problem	0
Reported Scam	0
Set Up 3rd Party Notification	0
Set Up New Account	6
Wildfire Related Issue	0
<b>TOTAL</b>	<b>665</b>

**Table 2.5.1d. Activity: Needs Assistance: By Language**

Language	Disputes Resolved
Arabic	2
Armenian	76
Cantonese	85
English	213
Eritrean	2
Farsi	1
Indonesian	1
Japanese	1
Korean	55
Mandarin	21
Spanish	185
Tagalog	1
Vietnamese	107
<b>TOTAL</b>	<b>750</b>

### 2.5.1.2 Marketing

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

- In February, CARE and FERA were featured in customers' monthly electric bill "onserts" — pre-printed newsletter-type communications —

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

with articles providing resources to help reduce their electricity bills

- Throughout 2019, SCE continued to reach out to potentially eligible non-CARE customers in an effort to enroll them in CARE or FERA. As described in **Section 2.5**, above, more than 1.7 million targeted, direct-to-consumer mailers and more than 700,000 e-mails 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 rate-discount annual solicitation process in June 2019, SCE included CARE / FERA enrollment applications in the bills of over two million customers receiving a paper bill. Due to this effort, nearly 7,322 new households received the CARE rate discount.
- SCE's Customer Contact Center continues to employ the CARE / FERA enrollment application on the public website, SCE.com, either to directly enroll customers into the CARE Program by telephone, or to offer to mail a rate discount application to the customer. In 2019 more than 26,000 eligible low-income customers were enrolled through Call Center outreach efforts, including both all web enrollments and Call Center-mailed applications.
- CARE enrollment is coordinated with other low-income programs such as ESA, SCE's Energy Assistance Fund (EAF) Program, LIHEAP, SoCalGas Company's income-qualified programs, and programs run by certain water utilities. ESA participants are automatically enrolled in CARE each month and LIHEAP participants are automatically enrolled in CARE each quarter. In 2019, nearly 51,000 eligible customers were enrolled in CARE through data sharing with LIHEAP, ESA, EAF, SoCalGas, and water utilities. 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. As a result of these efforts, the Capitation Fee Program continues to show increased enrollments from agencies that were previously inactive. In 2019, capitation contractors successfully enrolled nearly 1000 new customers in the CARE Program.
- SCE enrolls new CARE customers through the EAF Program, which provides utility bill payment assistance through voluntary customer, employee, and SCE shareholder donations. EAF Program income requirements are the same as those for CARE. In 2019, 844 EAF recipients were enrolled in the CARE Program.

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

### 2.5.1.3 Paid Media (Advertising)

The 2019 IQP advertising campaign employed digital banners (desktop and mobile), Search Engine Marketing (SEM) placements, social posts, and newspaper insertions. Digital media ads were placed through RhythmOne, a top-performing advertising network. The campaign generated over 105.7 million impressions targeting General Market (GM), Asian (Chinese, Korean, Vietnamese, Filipino/Tagalog), Hispanic, and African-American audience segments.

- **Display:** Desktop display and mobile placements targeted GM, Asian, Hispanic, and African-American segments with a household income less than \$75,000. The desktop and mobile placements delivered over 61.6 million impressions and an overall conversion rate of 0.08%. Ethnic placements did not meet the conversion rate benchmark of 0.09% overall. Display also delivered over 45,000 clicks at a click-through-rate (CTR) of 0.07% across ESAP and Joint IQP (Rate Discount and ESA) flights.
- **Search Engine Marketing:** SEM targeted Spanish- and English-speaking customers throughout SCE's service territory and delivered 502,631 impressions, 66,899 clicks, and a 13.31% CTR. We saw a 93% increase in SEM CTR performance in 2019 compared to 2018.
- **Print:** 255 insertions were placed across 36 publications targeting the Hispanic, African-American, and Asian (Chinese, Korean, and Vietnamese) audience segments. The print campaign delivered over 32.8 million impressions.
- **Social:** English and Spanish-language ads were placed on Facebook and Instagram. This campaign received 10,715,340 impressions and reached 1,975,285 unique people. The campaign garnered 93,704 with a click rate of 0.87%, overall on a par with the 2018 social media campaign.

### GENERAL MARKET

The advertising campaign launched July 9 and ran through December 31, 2019. General Market media delivered a total of 46,209,146 impressions.

#### Digital Display Summary:

Advertising run for both ESA and Joint IQP:

- ESAP placements delivered 16,671,424 impressions, with a conversion rate of 0.08% and a CTR of 0.08%, and
- Joint IQP placements delivered 23,143,347 impressions, with a conversion rate of 0.06% and a CTR of 0.07%.

Advertising run on both Desktop and Mobile platforms:

- Desktop placements delivered 16,598,912 impressions, with a conversion rate of 0.02% and a CTR of 0.04%, and
- Mobile placement delivered 23,215,859 impressions, with a conversion

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

rate of 0.10% and a CTR of 0.10%.

### AFRICAN-AMERICAN MARKET

The advertising campaign launched July 9 and ran through December 31, 2019. African-American media delivered a total of 8,183,293 impressions.

#### Digital Display Summary:

Advertising run for both the ESA Program and Joint IQP promoting ESAP and CARE:

#### African-American:

- ESAP placements delivered 2,041,895 impressions, with a conversion rate of 0.07% and a CTR of 0.07%, and
- Joint IQP placements delivered 2,203,590 impressions, with a conversion rate of 0.08% and a CTR of 0.08%.

Advertising run on both Desktop and Mobile platforms:

#### African-American:

- Desktop placements delivered 2,120,661 impressions, with a conversion rate of 0.02% and a CTR of 0.04%, and
- Mobile placements delivered 2,124,824 impressions, with a conversion rate of 0.11% and a CTR of 0.11%.

### ASIAN MARKET

The advertising campaign launched July 9 and ran through December 31, 2019. Asian media delivered a total of 21,378,867 impressions.

#### Digital Display Summary:

Digital placements for Joint IQP advertising were delivered in-language to Chinese, Vietnamese, Filipino (Tagalog), and Korean audiences across desktop and mobile devices:

- **Chinese** delivered 2,603,995 impressions, with a Conversion rate of 0.07% and a CTR of 0.07%
- **Vietnamese** delivered 2,394,041 impressions, with a Conversion rate of 0.07% and a CTR of 0.07%
- **Filipino (Tagalog)** delivered 2,202,059 impressions, with a Conversion rate of 0.08% and a CTR of 0.07%, and
- **Korean** delivered 2,603,156 impressions, with a Conversion rate of 0.07% and a CTR of 0.08%.

Advertising run on both Desktop and Mobile platforms:

#### Chinese

- Desktop placements delivered 1,211,190 impressions, with a

## **SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020**

conversion rate of 0.02% and a CTR of 0.04%, and

- Mobile placements delivered 1,392,805 impressions, with a conversion rate of 0.10% and a CTR of 0.11%.

### **Vietnamese**

- Desktop placements delivered 813,334 impressions, with a conversion rate of 0.02% and a CTR of 0.03%, and
- Mobile placements delivered 1,580,697 impressions, with a conversion rate of 0.10% and a CTR of 0.10%.

### **Filipino (Tagalog)**

- Desktop placements delivered 998,762 impressions, with a conversion rate of 0.02% and a CTR of 0.04%, and
- Mobile placements delivered 1,203,297 impressions, with a conversion rate of 0.12% and a CTR of 0.11%.

### **Korean**

- Desktop placements delivered 957,617 impressions, with a conversion rate of 0.02% and a CTR of 0.05%, and
- Mobile placements delivered 1,645,539 impressions, with a conversion rate of 0.10% and a CTR of 0.10%.

## **HISPANIC MARKET**

The advertising campaign launched July 9 and ran through December 31, 2019. Hispanic media delivered a total of 29,988,873 impressions.

### **Digital Display Summary:**

Advertising run for both ESAP and Joint IQP that promoted ESAP and CARE:

- ESAP placements delivered 3,196,791 impressions, with a conversion rate of 0.07% and a CTR of 0.08%, and
- Joint IQP placements delivered 4,611,135 impressions, with a conversion rate of 0.07% and a CTR of 0.07%.

Advertising run on both Desktop and Mobile platforms:

- Desktop placements delivered 3,572,155 impressions, with a conversion rate of 0.01% and CTR of 0.03%, and
- Mobile placements delivered 4,235,771 impressions, with a conversion rate of 0.10% and a CTR of 0.11%.

## Illustrations: Paid Media Advertising

**ASIAN: 10IX**

**A12** 星島日報 | 星島 | SINGTAO.COM.NEWS

**案件證實  
憑空捏造  
目前已被  
解除職務**

**謊稱遭狙擊手槍擊  
竟是員警自導自演**

**變性男子酒吧遭拖走 引爆洛市性別團體不滿**

**SCE有為您省錢的計劃**

**您的能源帳單可省下約30%**

**免費家電**

**斷除煙癮,否則可能  
必須斷除其他部位!**

**吸烟一開始,就会终身面临吸烟危害,更增加吸烟癌症、  
心脏病及更多其他疾病的可能。但追究真正正確什麼?**

**為幫助大眾瞭解所造成的實際影響,疾控中心(CDC)特地要求  
真實的自拍者親自說法,與大家分享他們的故事。**

**布蘭登 (Brandon)**

**1-800-838-8917**

**10**

**AFRICAN AMERICAN: 59x**

**A-2** LASENTINEL.NET

**NEWS**

**TUESDAY, OCTOBER 21, 2014**

**L.A. Sparks Teach Health and Wellness to Female Veterans**

**Sparks head of health and wellness, Shellye Washington, right, speaks to a group of female veterans during a recent class at the Department of Mental Health in Los Angeles.**

**Shellye Washington, right, speaks to a group of female veterans during a recent class at the Department of Mental Health in Los Angeles.**

**L.A. City Council Approves Appointment of Karim Webb to the Board of Airport Commissioners**

**Los Angeles City Council approves appointment of Karim Webb to the Board of Airport Commissioners**

**SCE HAS MONEY-SAVING PROGRAMS.**

**See if You Qualify**

**Free Appliances**

**For qualifying households, SCE can offer several ways to lower your monthly bill and conserve energy. You can get up to \$100 off your electric bill through the California Home Energy Upgrade program if you qualify for the low-income home retention discount program. You may also be able to receive other energy efficiency upgrades, lighting, weatherization and more. Call or visit us online with any energy savings assistance request daily. To learn more about how you could qualify as a customer, call 1-800-838-8917.**

**EDISON Energy for What's Ahead®**

**Vietnamese Banner**

**English Banners**

**Korean Banner**

**Spanish Banner**

**Tagalog Banner**

**Chinese Banner**

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

**Social Media:** In 2019, social media was used to communicate income-qualified program information and promote the ESAP and CARE/FERA programs.

The Advertisements, in English and Spanish, were targeted to customers with low-income-related activities and behaviors, such as being identified as being on a fixed income, the Supplemental Nutrition Assistance Program (SNAP), or related income attributes.

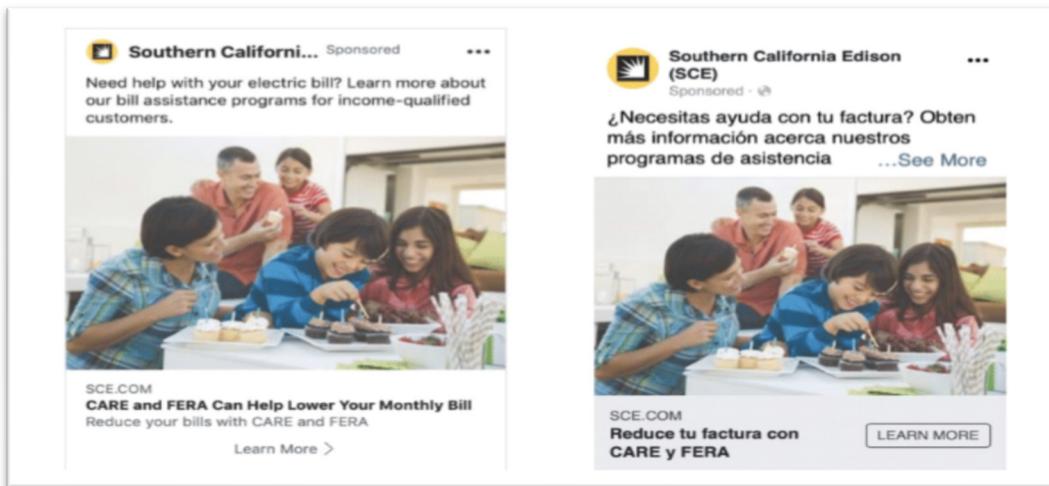
Customers were made aware of the programs through link updates in English and Spanish on Facebook and Instagram which directed customers to the respective programs' websites for more information.

- This campaign received 10,715,340 impressions and reached 1,975,285 unique people. SCE spent \$88,000 on Facebook and Instagram and ads were in flight from June through December 2019.
- The campaign garnered 93,704 clicks, with a CTR of 0.87%, on a par with the 2018 social media campaign.

### Illustrations: Social Media Advertising



## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020



**Earned Media:** Throughout 2019, coverage of SCE's Income Qualified Programs resulted in 13 earned media stories, five in Asian media outlets, one in Hispanic media, three in African American, and four in general media:

- In January, SCE developed an *Energized by Edison* story, "Lower Your Electric Bill, Increase Energy Efficiency," which informed readers about how they could lower their electricity bills by participating in money-saving programs at SCE, including the rate-discount programs CARE and FERA, plus ongoing savings through free replacement of working appliances such as refrigerators, air conditioners, and more.
- In addition to programs to help lower electric bills, the story provided information on SCE's Energy Assistance Fund (EAF) which in partnership with the United Way of Greater Los Angeles provides up to \$100 to help customers pay their SCE energy bills when they meet the program's income qualifications. Assistance is available once during a 12-month period.
- The story also covered the Budget Assistant program which allows customers to set monthly spending goals and receive proactive alerts weekly, mid-month, or when they have exceeded the spending goal, and the Level Pay Plan which allows eligible customers to pay for their annual electricity service across 11 equal monthly payments.

The Energized by Edison story, "Lower Your Electric Bill, Increase Energy Efficiency" was shared by the following media outlets:

- January 29, 2019: Antelope Valley (CA) Times (<http://theavtimes.com/2019/01/29/sce-offering-programs-to-lower-your-electric-bill/>)
- February 11, 2019: The Fillmore Gazette (<http://www.fillmoregazette.com/front-page/lower-your-electric-bill-increase-energy-efficiency>).

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- February 13, 2019: Siam Media (<http://live.siammedia.org/index.php/news/usa-news/37971>)
- February 15, 2019: Pakistan Link (<https://www.pakistanlink.org//Community/2019/Feb19/15/04>)
- February 16, 2019: Asian Journal ([https://issuu.com/asianjournaldigitaledition/docs/021619\\_los\\_angeles\\_weekend\\_edition](https://issuu.com/asianjournaldigitaledition/docs/021619_los_angeles_weekend_edition))
- February 20, 2019: Korea Daily (<http://www.koreadaily.com/news>)

In May, another *Energized by Edison* story, "Programs Help Those with Lean Incomes Keep Lights On," highlighted the new 2019-20 Income Qualified Program Levels effective June 1, 2019, per the CPUC's announcement of new 2019-2020 income-qualified guidelines for CARE, FERA, and the Energy Savings Assistance (ESA) Program.

In the story, an IQP Senior Manager was quoted saying that "SCE wants to make sure its eligible customers are aware of the updated income guidelines for these discount programs and encourage them to apply so they can save money on their monthly bill and meet their energy needs." The story was carried on the following media sites:

- June 12, 2019: San Bernardino American Press (<https://sb-american.com/2019/06/12/programs-help-those-with-lean-incomes-keep-lights-on/>)
- June 13, 2019: Orange County (CA) Breeze ([http://www.oc-breeze.com/2019/06/13/140225\\_programs-help-those-with-lean-incomes-save-money-keep-lights-on/](http://www.oc-breeze.com/2019/06/13/140225_programs-help-those-with-lean-incomes-save-money-keep-lights-on/))
- June 15, 2019: Chino Champion ([https://www.championnewspapers.com/community\\_news/article\\_7d76d38e-8ecb-11e9-a4a7-e3e882fd2bec.html](https://www.championnewspapers.com/community_news/article_7d76d38e-8ecb-11e9-a4a7-e3e882fd2bec.html))
- June 19, 2019: Viet Bao Daily News (<https://vietbao.com/a295486/chuong-trinh-giup-nguoicoco-loi-tuc-thap-tiep-tuc-co-dien-huong-dan-moi-ve-loi-tuc-co-the-giup-khach-hang-sce-hoi-du-dieu-kien-ti>)
- June 21, 2019: Pace News (<https://www.pacenewsonline.com/pacenewsjune212019-1-12.pdf>)
- June 22, 2019 International Daily News (<http://www.chinesetoday.com/big/article/1263671>)
- June 22, 2019: Asian Journal ([https://issuu.com/asianjournaldigitaledition/docs/062219\\_los\\_angeles\\_weekend\\_edition](https://issuu.com/asianjournaldigitaledition/docs/062219_los_angeles_weekend_edition))
- June 27, 2019: LA Watts Times ([https://lawattstimes.com/index.php?option=com\\_content&view=article&i](https://lawattstimes.com/index.php?option=com_content&view=article&i))

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d=5920:new-income-guidelines-can-save-qualified-customers-money-on-their-electricity-bill-programs-help-those-with-lean-incomes-keep-the-lights-on&catid=23&Itemid=118 )

- June 27, 2019: LA Sentinel (<https://lasentinel.net/new-income-guidelines-can-save-qualified-customers-money-on-their-electricity-bill.html> )
- June 27, 2019: Vien Dong Daily News (<http://www.viendongdaily.com/sce-giup-nguoicoco-loi-tuc-thap-tiep-tuc-co-dien-POWbTnuq.html> )
- July 1, 20019: Pakistani Link (<https://www.pakistanlink.org/Community/2019/June19/21/03.HTM>)
- July 20, 2019: El Panameric

Finally, on September 17, 2019, KNBC-TV Los Angeles<sup>42</sup> reported on its website that "an Orange County couple says SoCal Edison's CARE program qualified them for a new refrigerator, free of cost, but when it came to actually receiving the appliance, they said the company wouldn't deliver – until NBCLA's I-Team got involved." John and Lori Madsen "qualified for a new energy efficient refrigerator through the CARE program," but "say SoCal Edison only offered one with a top freezer, which didn't work for Lori, who has disabilities." The Madsens also "say the power company told them if they didn't take the appliance, they might be bumped from the program." NBCLA's I-Team contacted SoCal Edison on the Madsens' behalf, "and the company delivered a fridge with a bottom freezer right away." The utility "also wants to remind customers it has various income-qualified programs that can help reduce your bill." KNBC-TV Los Angeles<sup>43</sup> also broadcast the story.

### 2.5.1.4 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 2019 606,091 CARE customers received HERs. SCE implemented a new HER wave bringing the total number of active waves to seven, reaching more than 2.5 million SCE customers. This increase in waves resulted in 51% of the CARE population receiving HERs, exceeding the CPUC mandate of 15%.

#### Home Energy Report Total Counts for 2019

Customers enrolled in CARE as of December 2019	<b>1,185,146</b>
Number of HER Recipients on a CARE rate	<b>606,091</b>
Percentage of CARE population that received HERs	<b>51%</b>

<sup>42</sup> <https://www.nbclosangeles.com/news/local/refrigerator-randy-mac-socal-edison-care-program/1965907/>.

<sup>43</sup> <http://mailview.bulletinintelligence.com/mailview.aspx?m=2019091801edisonintl&r=email-92f9&l=011-9bb&t=c>

**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 2019 were:

1. General enrollment efforts, which generated 42% of all enrollments. These outreach efforts include the Capitation Fee Project and enrollments through third-party interactive voice response campaigns.
2. Call Center enrollment efforts, which generated 10% 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 to appeal to customers using the Internet:
  - Customer enrolling via Internet generated 28% of all enrollments, and
  - Internal and external data-sharing efforts generated 20% of all enrollments.

**2.5.3 Barriers to Participation encountered during the reporting period and steps taken to mitigate them.**

Through many outreach, marketing, and awareness campaigns, SCE has been persistent in its ongoing efforts to reach and enroll customers. Significant outreach efforts in 2019 included, but were not limited to:

- Multilingual outreach using both direct-to-consumer and mass media advertising with print or digital ads in Spanish and Asian languages, and
- Designing CARE marketing materials and correspondence to reach increasing numbers of ethnic populations and under-penetrated geographic areas.

SCE ended the 2019 program year at 87% penetration and will continue to vigorously market the program 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, 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 2019 approximately 45,841

## **SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020**

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 qualified customers in completing a CARE application. The CARE Program continually integrates its efforts and messaging with the ESA Program at all outreach events, communications, and marketing campaigns.

Additionally, when a customer enrolls in CARE, the customer's information is provided to the ESA Program as a lead. In cases where a CARE customer has passed income documentation as part of the High Usage Post Enrollment Verification process (HU PEV), CARE informs the ESA Program of the verification, and the customer will not need to re-verify their income with ESA Program.

### **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 provide one-on-one assistance to SCE's hardest-to-reach customer base. In 2019, 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 3,326 enrollments in 2019.

Additionally, in compliance with D.18-11-027<sup>44</sup> SCE implemented a new Food Bank Rate Assistance Program to provide eligible food banks a 20% discount on their bill. SCE complied with this directive by individually contacting all eligible customers in SCE's service territory to inform them of this new rate option. Six out of the eight eligible Food Banks responded and are now receiving the discounted rate.

#### **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**

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<sup>44</sup> Decision (D.18-11-027) on Southern California Edison Company's Proposed Rate Designs and Related Issues, Issued December 7, 2018.

## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

**relevant costs can be considered in those proceedings' cost-effectiveness decision-making).**

As described in **Section 1.3.4**, above, a statewide Request for Proposal (RFP) was issued on March 30, 2018. In June 2018, SCE, in collaboration with the other IOUs, selected a load disaggregation vendor, Ecotagious (now Uplight) to develop customer end-use and electric usage profiles. SCE continued to develop implementation design and strategy in 2019 and to explore how this usage data can be leveraged in both Demand Response and Energy Efficiency programs.

### **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 remains steadfast in its commitment to promoting a robust culture of evidence as it continues to leverage advanced statistical techniques and methodologies in enhancing its business operations, highlighting the indispensable and influential role played by data in shaping programs and policies aimed at responding more effectively to the needs of low income households. In particular, predictive analytics serves as a fundamental tool in enhancing customer acquisition. This continues to identify customers with a significant

## **SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020**

propensity to be approved or recertified for CARE or FERA, considering the unique configuration of socio-economic and demographic characteristics that distinguish these two populations.

Additionally, multivariate statistical models ascertain the CARE customers most likely to be treated with energy efficiency measures from the ESA Program. Equally important, disproportionate stratified random sampling continues to be employed in selecting customers in the monthly samples for verification, sharply focusing on over-sampling customers with the greatest proclivity to fail eligibility requirements. A vital component of that operation involves analyzing the results for verifications, aimed at further refining the framework that guides the random sampling.

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

In November 2019, SCE implemented its "Rapid Results" 100-day initiative with the express goals of:

- Helping increase CARE and FERA enrollment numbers
- Reducing program cost by \$150,000 in Q1 2020
- Maintaining CARE enrollments at 85% or better
- Increasing FERA enrollments to 12%, and
- Maintaining and/or increasing customer satisfaction scores.

During the second month of the initiative, SCE successfully reclassified “marketing” e-mails to “transactional” removing the “opt-in” requirement so all e-mail addresses can receive the CARE message. This reclassification allows SCE to communicate to nearly double the number of households than were reached before and is expected to reduce program costs by approximately \$150,000 in Q1 2020. Additionally, by increasing our digital communications on an ongoing basis SCE can continue to outreach to more customers at a lower cost. Strategic planning and execution of the Rapid Results initiatives will continue through Q.1 2020.

### **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 mails a second request to the tenants before removing them from the rate.

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### **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 contractors).

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.

### **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 2019, there were no significant issues and/or events that impacted program management.

### **2.8 Pilots**

In 2019, no significant issues and/or events impacted pilots.

### **2.9 Studies**

In 2019, no significant issues and/or events impacted studies.

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## SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020

### 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**

2019	CARE Residential Facilities	CARE Commercial Facilities	Total
<b>January</b>	332	158	490
<b>February</b>	309	152	461
<b>March</b>	322	157	479
<b>April</b>	352	158	510
<b>May</b>	340	159	499
<b>June</b>	314	156	470
<b>July</b>	306	151	457
<b>August</b>	330	155	485
<b>September</b>	333	148	481
<b>October</b>	322	148	470
<b>November</b>	317	148	465
<b>December</b>	312	143	455

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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 2019		Recertified in 2019		Closed in 2019	
	Service Accounts	No. of Beds	Service Accounts	No. of Beds	Service Accounts	No. of Beds
Residential	179	2,910	153	2,537	60	489
Commercial	45	2,375	75	3,794	49	2,461
<b>TOTAL</b>	<b>224</b>	<b>5,285</b>	<b>22</b>	<b>6,331</b>	<b>109</b>	<b>2,950</b>

## 3.2 Usage Information

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

**Table 3.2.1a. Average Monthly Usage by Energy Source**

Commodity	Residential	Commercial
Gas	N/A	N/A
Electric	931	12,870

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

Customer	Gas Therms	Electric KWh
Residential Facilities	N/A	931
Commercial Facilities	N/A	12,870

## 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*, above.

## **SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020**

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

- Residential Facility Electric Discount: \$743.57.
- The average annual CARE discount received per residential facility by energy source is \$743.57.

### **3.3.1.3 Average Annual CARE Discount Received per Commercial Facility by energy source.**

- Commercial Facility Electric Discount: \$6,319.04.
- The average annual CARE discount received per commercial facility by energy source is \$6,319.04.

## **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 Contact Center.
- Events conducted by SCE's Local Public Affairs department 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.

See **Section 2.5.1**, above, for additional information on SCE's Outreach Activities undertaken by third parties on SCE's behalf.

#### **3.4.1.1 Discuss the Most Effective Outreach Method, including a discussion of how success is measured.**

Customers who qualify under the CARE Expansion program live primarily in group living facilities and homeless shelters, which can receive electric service on either residential or commercial rates. CARE Expansion outreach includes:

- SCE partners with nonprofit organizations throughout the territory for CARE enrollment purposes
- SCE's Customer Contact Center representatives promote the Expansion program to potential qualifying facilities whenever possible, and
- The forums conducted by the Local Public Affairs department highlight the CARE Expansion program as well.

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### **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. SCE does not share Facility Data.

### **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.**

The barrier to participation for the CARE Expansion Program emerges from a lack of knowledge about the availability of CARE to the nonprofit community. To help mitigate these issues, SCE's Customer Contact Center representatives continue to be trained to pre-screen customers and, based on customer responses, to offer the program when speaking with the owners or 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.**

In 2019, SCE continued to explore additional ways to more cost-effectively process applications, including using optical character recognition (OCR) that could process applications more efficiently. SCE is currently reviewing and testing various formats and plans to utilize this application in 2020.

## **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 2019, there were no significant issues and/or events that impacted program management in this reporting period.

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### 4. Fund Shifting

#### 4.1 Report ESA Program Fund Shifting Activity

No ESA fund shifting activity occurred within 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.

##### 4.1.1 CARE fund shifting activity within rules in Section 20.1 of D.08-11-031 as modified by D.10-10-008, D.16-11-022, & D.17-12-009.

- SCE was authorized \$2,684,843 for Outreach and the actual spend was \$2,964,235. This resulted in a difference of \$279,392.
- SCE was authorized \$800,000 for Processing, Certification, and Recertification and the actual spend was \$911,857. This resulted in a difference of \$111,857.
- SCE was authorized \$704,529 for General Administration and the actual spend was \$722,943. This resulted in a difference of \$18,414.
- SCE attributes the over-expenditure to increase enrollment efforts, associate processing, and program oversight.
- SCE shifted the \$409,663 from IT Programming and remains 91% under-spent in overall program cost.
- CARE is a "two-way" Balancing Account. Any over- or under-spending in the CARE Balancing Account will be transferred to the Public Purpose Adjustment Mechanism.

##### 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.1010-008, D.16-11-022, and D.17-12-009?

No ESA or CARE fund shifting activity occurred outside decision rules.

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**SCE ESA and CARE PROGRAMS ANNUAL REPORT – MAY 1, 2020**

## **5. Commonly Used Acronyms**

ACRONYM	TERM
<b>CARE</b>	California Alternate Rates for Energy
<b>CASF</b>	California Advanced Services Fund
<b>CBO</b>	Community-Based Organization
<b>CFILC</b>	California Foundation for Independent Living Centers
<b>CFL</b>	Compact Fluorescent Lamp
<b>CHOC</b>	Community Housing Opportunities Corporation
<b>CHPC</b>	California Housing Partnership Corporation
<b>CPUC</b>	California Public Utilities Commission
<b>CSI</b>	California Solar Initiative
<b>D.</b>	Decision
<b>CSD</b>	California Department of Community Services & Development
<b>DDTP</b>	Deaf and Disabled Telecommunications Program
<b>DRP</b>	Demand Response Program
<b>DSM</b>	Demand Side Management
<b>EE</b>	Energy Efficiency
<b>ESA</b>	Energy Savings Assistance
<b>FBO</b>	Faith-Based Organization
<b>FERA</b>	Family Electric Rate Assistance
<b>HEAT</b>	Home Energy Assistance Tracking
<b>HER</b>	Home Energy Report
<b>IHD</b>	In-Home Display
<b>IOU</b>	Investor-Owned Utility
<b>kW</b>	Kilowatt
<b>kWh</b>	Kilowatt Hour
<b>LIEE</b>	Low Income Energy Efficiency
<b>LIHEAP</b>	Low Income Home Energy Assistance Program
<b>MOU</b>	Memorandum of Understanding
<b>mW</b>	Megawatt
<b>mWh</b>	Megawatt Hour

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ACRONYM	TERM
<b>NEB</b>	Non-Energy Benefits
<b>NGAT</b>	Natural Gas Appliance Testing
<b>ODRS</b>	Online Data Reporting Systems
<b>OP</b>	Ordering Paragraph
<b>PCT</b>	Programmable Communicating Thermostat
<b>PEV</b>	Post Enrollment Verification
<b>PFM</b>	Petition for Modification
<b>PG&amp;E</b>	Pacific Gas & Electric Company
<b>PPP</b>	Public Purpose Program
<b>PY</b>	Program Year
<b>SCE</b>	Southern California Edison
<b>SCG or SoCalGas</b>	Southern California Gas Company
<b>SDG&amp;E</b>	San Diego Gas & Electric Company
<b>SSI</b>	Supplemental Security Income
<b>SSD</b>	Supplemental Security Disability
<b>SSP</b>	Social Security Pension
<b>TDD</b>	Telecommunications Device for the Deaf
<b>TRC</b>	Total Resource Cost Test
<b>UC</b>	Utility Costs

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## **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

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- CARE Program – Table 3A – CARE Post Enrollment Verification Results (Model)
- CARE Program – Table 3B – CARE Post Enrollment Verification Results (High Usage)
- CARE Program – Table 4 – Self Certification and Re-Certification
- CARE Program – Table 5 – Enrollment by County
- CARE Program – Table 6 – Re-certification Results
- CARE Program – Table 7 – Capitation Contractors
- CARE Program – Table 8 – Participants per Month
- CARE Program – Table 9 – Average Monthly Usage & Bill
- CARE Program – Table 10 – CARE Surcharge & Revenue
- CARE Program – Table 11 – CARE Capitation Applications
- CARE Program – Table 12 – CARE Expansion Program
- CARE Program – Table 13 – CARE High Usage Verification Results
- CARE Program – Table 13A – CARE Customer Usage and ESA Program Treatment
- CARE Program – Table 14 – CARE Categorical Enrollment

**Energy Savings Assistance Program  
And  
California Alternate Rates for Energy Program  
Southern California Edison 2019 Summary Highlights**

**ESA Program**

<b>2019 Energy Savings Assistance Program Summary</b>			
<b>2019</b>	<b>Authorized / Planning Assumptions</b>	<b>Actual</b>	<b>%</b>
Budget [1]	\$63,616,662	\$78,613,898	123.6%
Funded from 2009-2016 Unspent Funds	\$19,655,599	\$11,745,015	60%
Summary Homes Treated	98,953	95,397	96%
Summary kWh Saved	33,920,000	55,318,996	163%
Summary kW Demand Reduced	-	7,802	N/A
Summary Therms Saved	-	-	N/A
First Touches Homes Treated	81,477	74,627	92%
- kWh Saved	-	43,748,032	N/A
- kW Demand Reduced	-	6,195	N/A
- Therms Saved	-	-	N/A
Go-Backs/Retreated Homes	17,476	20,770	119%
- kWh Saved	-	11,530,397	N/A
- kW Demand Reduced	-	1,606	N/A
- Therms Saved	-	-	N/A

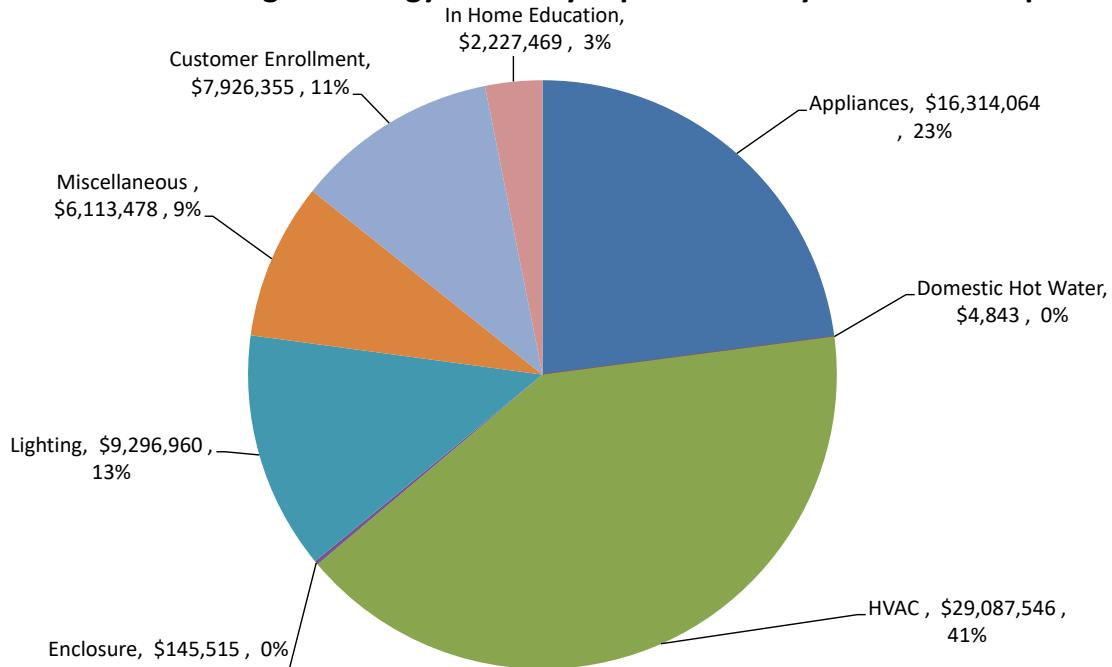
[1] Reflects the funding authorizedResolution E-4885 and Advice Letter 3824-E-A.

**CARE Program**

<b>2019 CARE Program Summary</b>			
<b>2019</b>	<b>Authorized Budget</b>	<b>Actual</b>	<b>%</b>
Administrative Expenses	\$6,791,638	\$6,155,745	91%
Subsidies	\$487,221,423	\$365,302,843	75%
Service Establishment Charge	\$0	\$0	0%
<b>Total Program Costs and Discounts</b>	<b>\$494,013,061</b>	<b>\$371,458,588</b>	<b>75%</b>
<b>CARE New Enrollments</b>	<b>Automatically Enrolled via Data Sharing, ESA Participation, etc</b>	<b>Self Certified as Categorically Eligible</b>	<b>Self Certified as Income Eligible</b>
Method	50,796	157,279	94,917
<b>CARE Penetration</b>	<b>Estimated Eligible Participants</b>	<b>Participants</b>	<b>Penetration Rate</b>
<b>Total Enrolled</b>	<b>1,185,146</b>	<b>1,337,092</b>	<b>89%</b>

[1] Authorized budget approved on January 4, 2019 per Mid-Cycle Advice Letter 3824-E-A

**Southern California Edison - PY 2019**  
**ESA Program Energy Efficiency Expenditures by Measure Group**



**Southern California Edison - PY 2019 Energy Savings Assistance Program Annual Report**  
**ESAP Table 1**  
**ESAP Overall Program Expenses**

ESA Program:	2019 Authorized Budget <sup>1,2</sup>			2019 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
<b>Energy Efficiency</b>									
Appliances <sup>[3]</sup>	\$ 21,628,600		\$ 21,628,600	\$ 16,314,064	\$ -	\$ 16,314,064	75%	0%	75%
Domestic Hot Water	\$ 31,348		\$ 31,348	\$ 4,843	\$ -	\$ 4,843	15%	0%	15%
Enclosure	\$ 218,022		\$ 218,022	\$ 145,515	\$ -	\$ 145,515	67%	0%	67%
HVAC	\$ 24,897,305		\$ 24,897,305	\$ 29,035,879	\$ -	\$ 29,035,879	117%	0%	117%
Maintenance	\$ 100,220		\$ 100,220	\$ -	\$ -	\$ -	0%	0%	0%
Lighting	\$ 1,013,054		\$ 1,013,054	\$ 9,296,960	\$ -	\$ 9,296,960	918%	0%	918%
Miscellaneous	\$ 2,631,912		\$ 2,631,912	\$ 6,113,478	\$ -	\$ 6,113,478	232%	0%	232%
Customer Enrollment	\$ 4,489,283		\$ 4,489,283	\$ 7,926,355	\$ -	\$ 7,926,355	177%	0%	177%
In Home Education	\$ 1,457,578		\$ 1,457,578	\$ 2,227,469	\$ -	\$ 2,227,469	153%	0%	153%
Pilot				\$ 14,862	\$ -	\$ 14,862	0%	0%	0%
<b>Energy Efficiency TOTAL</b>	<b>\$ 56,467,322</b>	<b>\$ -</b>	<b>\$ 56,467,322</b>	<b>\$ 71,079,423</b>	<b>\$ -</b>	<b>\$ 71,079,423</b>	<b>126%</b>	<b>0%</b>	<b>126%</b>
<b>Training Center</b>									
Training Center	\$ 539,344	\$ -	\$ 539,344	\$ 158,243	\$ -	\$ 158,243	0%	0%	0%
Inspections	\$ 1,151,406	\$ -	\$ 1,151,406	\$ 1,294,222	\$ -	\$ 1,294,222	112%	0%	112%
Marketing and Outreach	\$ 950,000	\$ -	\$ 950,000	\$ 1,175,862	\$ -	\$ 1,175,862	124%	0%	124%
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Measurement and Evaluation Studies	\$ 91,250	\$ -	\$ 91,250	\$ 203,693	\$ -	\$ 203,693	223%	0%	223%
Regulatory Compliance	\$ 478,313	\$ -	\$ 478,313	\$ 492,525	\$ -	\$ 492,525	103%	0%	103%
General Administration	\$ 3,879,027	\$ -	\$ 3,879,027	\$ 4,145,539	\$ -	\$ 4,145,539	107%	0%	107%
CPUC Energy Division	\$ 60,000	\$ -	\$ 60,000	\$ 64,391	\$ -	\$ 64,391	107%	0%	107%
<b>TOTAL PROGRAM COSTS</b>	<b>\$ 63,616,662</b>	<b>\$ -</b>	<b>\$ 63,616,662</b>	<b>\$ 78,613,898</b>	<b>\$ -</b>	<b>\$ 78,613,898</b>	<b>124%</b>	<b>0%</b>	<b>124%</b>
<b>Funded Outside of ESA Program Budget</b>									
Indirect Costs				\$ 1,201,458	\$ -	\$ 1,201,458			
NGAT Costs				\$ -	\$ -	\$ -			

Notes:

[1] 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 specify amount, date fund-shifting activity occurred, date of fund-shifting request and related approval is applicable.

[3] included the 2019 purchased but un-used inventory

**Southern California Edison - PY 2019 Energy Savings Assistance Program Annual Report**  
**ESAP Table 1A**  
**Expenses Funded from 2009-2016 Unspent Program Funds**

ESA Program:	2019 Authorized Budget <sup>1,2</sup>			2019 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
<b>Energy Efficiency</b>									
Multi-Family Common Area Measures	\$ 4,500,000	\$ -	\$ 4,500,000	\$ 51,667		\$ 51,667	1%	0%	1%
Leveraging - CSD	\$ 1,000,000	\$ -	\$ 1,000,000	\$ -	\$ -	\$ -	0%	0%	0%
Climate Zone 13 Central AC and AC related measures	\$ 6,666,260	\$ -	\$ 6,666,260	\$ 8,971,028	\$ -	\$ 8,971,028	135%	0%	135%
Additional Authorized Funds for Treated customers <sup>3</sup>	\$ 1,790,584	\$ -	\$ 1,790,584	\$ -	\$ -	\$ -	0%	0%	0%
Additional Regulatory Compliance Cost	\$ 93,750	\$ -	\$ 93,750	\$ -	\$ -	\$ -	0%	0%	0%
HE Clothes Washer	\$ 3,318,844	\$ -	\$ 3,318,844	\$ -	\$ -	\$ -	0%	0%	0%
Powerstrip Tier II	\$ 2,286,161	\$ -	\$ 2,286,161	\$ 2,722,321	\$ -	\$ 2,722,321	0%	0%	0%
<b>TOTAL PROGRAM COSTS[1]</b>	<b>\$ 19,655,599</b>	<b>\$ -</b>	<b>\$ 19,655,599</b>	<b>\$ 11,745,015</b>	<b>\$ -</b>	<b>\$ 11,745,015</b>	<b>60%</b>	<b>0%</b>	<b>60%</b>

Notes:

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

[2] Reflects the authorized 2019 budget approved in SCE's Mid-Cycle Update AL 3824-E on January 4, 2019.

[3] Reflects the additional authorized budget approved in SCE's Mid-Cycle Update AL 3824-E on January 4, 2019 for 6,840 more First Time Treatments.

Measures	Year-To-Date Completed & Expensed Installation						% of Expenditure
	Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)		
Appliances							0.0%
Hip Efficiency Clothes Washer	Home 1,000	0	0	0	\$ 14,727,000		0.0%
Refrigerators	Home 13,900	8,650,000	180	-	\$ 10,100,000	16,160	0.0%
Dishwashers	Each 2,000	2,000	0	0	\$ 10,000	0.000	0.0%
Domestic Hot Water							0.0%
Other Hot Water	Home 441	87,000	0	0	\$ 20,177	0.0%	0.0%
Water Heater Installation	Home 1,000	0	0	0	\$ 10,000	0.000	0.0%
Thermostats/Showers/Valves Combined	Each 1,000	0	0	0	\$ 10,000	0.000	0.0%
Water Heater Repair/Replacement	Each 1,000	0	0	0	\$ 10,000	0.000	0.0%
Thermostat Control System	Each 1,000	0	0	0	\$ 10,000	0.000	0.0%
Enclosure							0.0%
Attic Insulation / Envelope [1]	Home 600	400,000	0	0	\$ 100,000	0.000	0.0%
Attic Insulation [2]	Home 1,000	1,000	0	0	\$ 10,000	0.000	0.0%
HVAC							0.0%
FAU Thermostats	Each 1,200	431,437	0	0	\$ 405,076	0.000	0.0%
FAU Thermostats Pilot Coverage	Each 1,000	0	0	0	\$ 10,000	0.000	0.0%
Central Air Purification	Home 1,000	0	0	0	\$ 10,000	0.000	0.0%
Central A/C Replacement	Home 6,101	1,631,058	285	0	\$ 24,911,430	29.9%	0.0%
Heat Pump Replacement	Home 210	330,400	140	0	\$ 1,669,901	1.3%	0.0%
Refrigerator (Single or Multi-Door)	Home 1,000	0	0	0	\$ 10,000	0.000	0.0%
Exhaust Fan (Refrigerator)	Home 8,777	5,436,456	816	0	\$ 10,066,073	12.7%	0.0%
Duct Testing and Sealing	Home 5,280	5,380	1	0	\$ 1,189,660	1.5%	0.0%
Efficiency Coating	Home 1,000	0	0	0	\$ 10,000	0.000	0.0%
Maintenance							0.0%
Painted Gaps and Ties	Home 1,000	0	0	0	\$ 10,000	0.000	0.0%
Refrigerator Sealant	Home 1,000	0	0	0	\$ 10,000	0.000	0.0%
Lighting							0.0%
Standard Fluorescent (G13) [1]	Each 1,000	5,000	0	0	\$ 10,000	0.000	0.0%
LED Handheld Cfl Replacements	Each 144	450	0	0	\$ 1,200	0.0%	0.0%
LED Handheld LED Replacements	Each 144	450	0	0	\$ 1,200	0.0%	0.0%
LED Light Bulbs	Each 601	50,000	0	0	\$ 1,000	0.0%	0.0%
LED Reflector Bulbs	Each 11,608	250,448	31	0	\$ 87,072	0.1%	0.0%
LED Tandems	Each 93,812	2,416,796	285	0	\$ 2,079,862	2.9%	0.0%
LED Strip	Each 500	0	0	0	\$ 10,000	0.000	0.0%
Miscellaneous							0.0%
Pool Pumps	Home 1,000	0	0	0	\$ 10,000	0.000	0.0%
Smart Power Strip - Tier 1	Home 1,000	0	0	0	\$ 10,000	0.000	0.0%
Smart Power Strip - Tier 2	Each 8,252	5,847,656	1,000	0	\$ 2,722,531	3.4%	0.0%
Customer Enrollment							0.0%
Home Education	Home 106,516	0	0	0	\$ 7,981,295	9.8%	0.0%
Home Education	Home 30,219	0	0	0	\$ 2,032,160	2.7%	0.0%
Pilot	Home 1,000	0	0	0	\$ 10,000	0.000	0.0%
Pilot	Home 1,000	0	0	0	\$ 10,000	0.000	0.0%
Total Savings/Expenditures		55,278,428	7,881	- \$ 81,192,338			
Total Households Weatherized		1,064					
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Southern California Edison - PY 2019 Energy Savings Assistance Program Annual Report

ESAP Table 2A

ESAP Expenses and Energy Savings by Measures Installed

Measures	Units	ESA Program - CSD Leveraging					
		Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses (\$)	% of Expenditure
<b>Appliances</b>							
High Efficiency Clothes Washer	Each						
Refrigerators	Each						
Microwaves [5]	Each						
<b>Domestic Hot Water</b>							
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						
<b>Enclosure</b>							
Air Sealing / Envelope [1]	Home						
Caulking	Home						
Attic Insulation	Home						
<b>HVAC</b>							
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						
<b>Maintenance</b>							
Furnace Clean and Tune	Home						
Central A/C Tune up	Home						
<b>Lighting</b>							
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						
<b>Miscellaneous</b>							
Pool Pumps	Each						
Smart Power Strips - Tier 1	Each						
New - Smart Power Strips - Tier 2	Each						
<b>Pilots</b>							
<b>Customer Enrollment</b>							
Outreach & Assessment	Home				\$ -		
In-Home Education	Home				\$ -		
<b>Total Savings/Expenditures</b>							
Total Households Weatherized [2]		-	-	-	\$ -		
<b>Households Treated</b>							
- Single Family Households Treated	Home						
- Multi-family Households Treated	Home						
- Mobile Homes Treated	Home						
Total Number of Households Treated	Home						
# Eligible Households to be Treated for PY [3]	Home						
% of Households Treated	%						
- Master-Meter Households Treated	Home						

Notes:

- [1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access
- [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:  
Income Energy Efficiency Program, Final Report." August 30, 2013
- [5] Microwave savings are from ECONorthWest Studies received in December of 2011.

Results for this table were not provided as SCE has not yet begun CSD leveraging efforts for the ESA Program.

Southern California Edison - PY 2019 Energy Savings Assistance Program Annual Report  
 ESAP Table 2B

ESAP Expenses and Energy Savings by Measures Installed

ESA CAM Measures	Year-To-Date Completed & Expensed Installation					
	Quantity Units	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
<b>MF Appliances</b>						
MF Freezer	Each	0	-	-	\$ -	0.0%
MF High Efficiency Clothes Washer	Home	0	-	-	\$ -	0.0%
MF Refrigerators	Each	0	-	-	\$ -	0.0%
<b>MF Domestic Hot Water</b>						
MF Air Sealing/Envelope [1]	Home	0	-	-	\$ -	0.0%
MF Faucet Aerator	Home	0	-	-	\$ -	0.0%
MF Low Flow Shower Head	Home	0	-	-	\$ -	0.0%
MF Other Hot Water	Home	0	-	-	\$ -	0.0%
MF Water Heater Blanket	Home	0	-	-	\$ -	0.0%
MF Water Heater Pipe Insulation	Home	0	-	-	\$ -	0.0%
<b>MF Enclosure</b>						
MF Attic Insulation	Home	0	-	-	\$ -	0.0%
MF Caulking	Home	0	-	-	\$ -	0.0%
<b>MF HVAC</b>						
MF Central A/C Replacement	Home	0	-	-	\$ -	0.0%
MF Duct Test Inspection	Each	0	-	-	\$ -	0.0%
MF Duct Testing and Sealing	Home	0	-	-	\$ -	0.0%
MF Evaporative Cooler (Installation)	Home	0	-	-	\$ -	0.0%
MF FAU Standing Pilot Conversion	Each	0	-	-	\$ -	0.0%
MF Furnace Repair/Replacement	Each	0	-	-	\$ -	0.0%
MF Heat Pump Replacement	Home	0	-	-	\$ -	0.0%
MF Inspection	Each	0	-	-	\$ -	0.0%
MF Programmable Thermostat	Each	0	-	-	\$ -	0.0%
MF Room A/C Replacement	Home	0	-	-	\$ -	0.0%
MF Smart Thermostat	Each	0	-	-	\$ -	0.0%
<b>MF Lighting</b>						
MF Landscape Lighting	Each	0	-	-	\$ -	0.0%
MF LED A-Lamp	Each	24	5,485.99	0.11	\$ 185	0.4%
MF LED Exit Sign	Each	1	360.34	0.06	\$ 87	0.2%
MF LED Exterior Fixture	Each	145	7,678.01	-	\$ 11,019	21.3%
MF LED Interior Fixture	Each	18	411.64	0.05	\$ 1,422	2.8%
MF LED PL-Lamps	Each	7	535.22	0.01	\$ 105	0.2%
MF LED Pool and Spa Lighting	Each	5	4,380.00	-	\$ 3,550	6.9%
MF LED Reflector Lamp	Each	4	640.94	0.01	\$ 53	0.1%
MF LED T-Lamp	Each	260	-	-	\$ 4,355	8.4%
MF LED Torchiere Lamp	Each	0	-	-	\$ -	0.0%
<b>MF Miscellaneous</b>						
MF New - Smart Power Strips - Tier 2	Each	0	-	-	\$ -	0.0%
MF Pool Pumps	Home	2	18,477.70	0.77	\$ 4,378	8.5%
MF Smart Power Strips - Tier 1	Home	0	-	-	\$ -	0.0%
<b>Appliances</b>						
High Efficiency Clothes Washer	Home	0	-	-	\$ -	0.0%
Refrigerators	Home	0	-	-	\$ -	0.0%
Freezer	Each	0	-	-	\$ -	0.0%
<b>Domestic Hot Water</b>						
Other Hot Water	Home	0	-	-	\$ -	0.0%
Tank and Pipe Insulation	Home	0	-	-	\$ -	0.0%
Thermostatic Shower Valves Combined	Each	0	-	-	\$ -	0.0%
Water Heater Repair/Replacement	Each	0	-	-	\$ -	0.0%
Thermostatic Shower Valve	Each	0	-	-	\$ -	0.0%
<b>Enclosure</b>						
Air Sealing / Envelope [1]	Home	0	-	-	\$ -	0.0%
Attic Insulation	Home	0	-	-	\$ -	0.0%
<b>HVAC</b>						
Smart Thermostat	Each	3	892.68	-	\$ 960	1.9%
FAU Standing Pilot Conversion	Each	0	-	-	\$ -	0.0%
Furnace Repair/Replacement	Home	0	-	-	\$ -	0.0%
Room A/C Replacement	Home	0	-	-	\$ -	0.0%
Central A/C Replacement	Home	2	1,704.00	0.26	\$ 24,863	48.1%
Heat Pump Replacement	Home	0	-	-	\$ -	0.0%
Evaporative Cooler (Replacement)	Each	0	-	-	\$ -	0.0%
Duct Testing and Sealing	Home	2	-	-	\$ 690	1.3%
Efficient Fan Control	Home	0	-	-	\$ -	0.0%
<b>Maintenance</b>						
Furnace Clean and Tune	Home	0	-	-	\$ -	0.0%
Central A/C Tune up	Home	0	-	-	\$ -	0.0%
<b>Lighting</b>						
Compact Fluorescent Lights (CFL)	Each	0	-	-	\$ -	0.0%
Exterior Hard wired CFL fixture	Each	0	-	-	\$ -	0.0%
Exterior Hard wired LED fixture	Each	0	-	-	\$ -	0.0%
LED A-lamp	Each	0	-	-	\$ -	0.0%
LED Reflector Lamp	Each	0	-	-	\$ -	0.0%
LED Torchiere Lamp	Each	0	-	-	\$ -	0.0%
Torchiere	Each	0	-	-	\$ -	0.0%
<b>Miscellaneous</b>						
Pool Pumps	Home	0	-	-	\$ -	0.0%
Smart Power Strip - Tier 1	Home	0	-	-	\$ -	0.0%
Smart Power Strip - Tier 2	Each	0	-	-	\$ -	0.0%
<b>Customer Enrollment</b>						
Outreach and Assessment	Home	0	-	-	\$ -	0.0%
<b>In Home Education</b>						
In-Home Education	Home	0	-	-	\$ -	0.0%
<b>Pilot</b>						
Pilot	Home	0	-	-	\$ -	0.0%
<b>Total</b>		<b>40,566.52</b>	<b>1.25</b>		<b>\$ 51,667</b>	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated	5
Subtotal of Master-metered Multifamily Properties	0
Total Number of Multifamily Tenant Units w/in Properties Treated	395

ESA Program - Multifamily Common Area	Year to Date Expenses		
	Electric	Gas	Total
Administration			
Direct Implementation (Non-Incentive)	\$51,667		\$51,667
	Total Expenses	Total Expenses	
<b>TOTAL MF CAM COSTS</b>	<b>\$51,667</b>		<b>\$51,667</b>

**Southern California Edison - PY 2019 Energy Savings Assistance Program Annual Report**  
**ESAP Table 3**  
**Program Cost Effectiveness**

Ratio of Benefits Over Costs			Net Benefits \$ (million)	
Program Year	ESACET	Resource TRC	ESACET	Resource TRC
2019	0.98	1.28	(1.69)	17.97

Notes:

1. All program measures "resource and non-resource measures" are included in the ESACET. Only measures considered "resource measures" are included in the Resource TRC.
2. The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs.
3. The Resource TRC includes energy benefits and program measure and installation costs.
4. 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.
5. Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC.

Southern California Edison - PY 2019 Energy Savings Assistance Program Annual Report

ESAP Table 4

Detail by Housing Type and Source<sup>1</sup>

Customer	Housing Type	2019 Energy Savings <sup>5</sup>				2018 Expenses
		# Homes Treated	(mWh)	MW	(mTherm)	
<b>Gas and Electric Customers</b>						
Owners - Total		-	-	-	-	-
Single Family						
Multi Family						
Mobile Homes						
Renters - Total		-	-	-	-	-
Single Family						
Multi Family						
Mobile Homes						
<b>Electric Customers (only)</b>						
Owners - Total		43,473	29,428	4.35	-	\$ 55,918,631
Single Family		37,543	25,665	3.81		\$ 49,902,734
Multi Family		873	590	0.11		\$ 901,417
Mobile Homes		5,057	3,173	0.43		\$ 5,114,480
Renters - Total		51,924	25,891	3.45	-	\$ 34,440,282
Single Family		24,675	13,696	1.90		\$ 19,755,654
Multi Family		26,230	11,573	1.47		\$ 13,806,445
Mobile Homes		1,019	622	0.08		\$ 878,183
<b>Gas Customers (only)</b>						
Owners - Total						
Single Family						
Multi Family						
Mobile Homes						
Renters - Total						
Single Family						
Multi Family						
Mobile Homes						
<b>Gas and Electric Total</b>						
Multifamily Common Area Bldgs - Total						
Totals:		95,397	55,319	7.80	-	\$ 90,358,914

Penetration History				
Year	Homes Treated <sup>2</sup>	Ineligible & Unwilling <sup>3</sup>	Estimated Eligible in Current Year <sup>4</sup>	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	67,249	56,651	76,584	87%
2019	74,627	75,456	98,953	75%
2020				
Total Homes Treated since 2002	1,063,678	482,933	943,349	

Note:

<sup>1</sup> Summary data which includes ESA Program and MF efforts.

<sup>2</sup> 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.

<sup>3</sup> Ineligible & Unwilling defined in ESA Table 8.

<sup>4</sup> 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. For 2018 and 2019, values are based on Table 3 of January 4, 2019 Energy Division Non-Standard Disposition Letter regarding SCE Advice Letters 3824-E, 3824-E-A, and 3473-E, and 3473-E-A.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2018	PG&E	6,145	4
2018	SDG&E	0	0
2018	SoCalGas	1,100,777	48,905

**Southern California Edison - PY 2019 Energy Savings Assistance Program Annual Report**  
**ESAP Table 5**  
**ESAP Direct Purchases & Installation Contractors [1]**

Contractor	County	Contractor Type (Check one or more if applicable)				<b>2019 Annual Expenditures</b>
		Private	CBO	E	LIHEAP	
- Contractor 1	All	x				\$ 2,898,236
- Contractor 2	14	x		x		\$ 431,827
- Contractor 3	4		x			\$ 767,815
- Contractor 4	All	x		x		\$ 4,364,892
- Contractor 5	8		x		x	\$ 138,432
- Contractor 6	All	x		x		\$ 21,304,696
- Contractor 7	4,6,7,8,11	x		x		\$ 2,330,613
- Contractor 8	6,7,11	x		x		\$ 789,782
- Contractor 9	4		x	x		\$ 97,653
- Contractor 10	All	x				\$ 4,805,214
- Contractor 11	All	x				\$ 1,530,451
- Contractor 12	4, 6	x		x		\$ 1,369,034
- Contractor 13	14	x		x		\$ 2,293,165
- Contractor 14	7,8	x		x		\$ 9,837,062
- Contractor 15	4		x	x	x	\$ 127,203
- Contractor 16	2,4,6,10,11		x	x	x	\$ 5,523,946
- Contractor 17	4,9,11		x	x	x	\$ 82,157
- Contractor 18	6,7,8	x		x		\$ 3,477,918
- Contractor 19	1,2,3,4,5,8,9,10,11			x		\$ 4,382,765
- Contractor 20	4,8	x				\$ 913,707
- Contractor 21	4,8	x		x		\$ 3,625,628
- Contractor 22	All	x		x		\$ 428,544
- Contractor 23	6,7	x		x		\$ 333,370
- Contractor 24	14	x		x		\$ 695,660
- Contractor 25	14	x				\$ 699,778
- Contractor 26	4,7,8	x		x		\$ 7,954,482
- Contractor 27	14		x	x		\$ 438,691
- Contractor 28	4,6	x				\$ 69,502
<b>Total Contractor Expenditures</b>						<b>\$ 81,712,223</b>

Note:

[1] Summary data which includes ESA Program and MF efforts.

1 Inyo

2 Kern

3 Kings

4 Los Angeles

5 Mono

6 Orange

7 Riverside

8 San Bernardino

9 Santa Barbara

10 Tulare

11 Ventura

12 Fresno

13 Service clients from within the organization

14 Service SCG customers only

**Southern California Edison - PY 2019 Energy  
Savings Assistance Program Annual Report**  
**ESAP Table 6**  
**ESAP Installation Cost of Program Installation**  
**Contractors [1]**

	Unit of Measure	CBO/WMDVBE								Non-CBO/WMDVBE								2019 Program Total				
		Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households	Costs	Cost/ Unit	Cost/ Household				
		Units	%	Units	%	\$	%	Units	%	Units	%	\$	%									
Dwellings	Each	-	0%	-	0%	\$	-	0%	-	0%	-	0%	\$	-	0%	-	-	\$	-	\$	-	
<b>Appliances</b>																						
Refrigerators	Home	14,001	100%	13,903	100%	\$	14,727,956	100%	-	0%	-	0%	\$	-	0%	14,001	13,903	\$ 14,727,956	\$ 1,051.92	\$ 1,059.34		
Freezer	Each	23	100%	23	100%	\$	19,606	100%	-	0%	-	0%	\$	-	0%	23	23	\$ 19,606	\$ 852.42	\$ 852.42		
<b>Domestic Hot Water</b>																						
Other Hot Water	Home	441	0%	1,135	100%	\$	20,177	100%	-	0%	-	0%	\$	-	0%	441	1,135	\$ 20,177	\$ -	\$ 17.78		
Tank and Pipe Insulation	Home	22	0%	21	100%	\$	770	100%	-	0%	-	0%	\$	-	0%	22	21	\$ 770	\$ -	\$ 36.64		
<b>Enclosure</b>																						
Air Sealing / Envelope	Home	664	100%	664	100%	\$	90,770	100%	-	0%	-	0%	\$	-	0%	664	664	\$ 90,770	\$ -	\$ 136.70		
Attic Insulation	Home	5	100%	5	100%	\$	9,981	100%	-	0%	-	0%	\$	-	0%	5	5	\$ 9,981	\$ -	\$ 1,996.20		
<b>HVAC</b>																						
Room A/C Replacement	Home	837	100%	666	100%	\$	734,530	100%	-	0%	-	0%	\$	-	0%	837	666	\$ 734,530	\$ 877.57	\$ 1,102.90		
Central A/C Replacement	Home	5,447	100%	5,161	100%	\$	24,311,430	100%	-	0%	-	0%	\$	-	0%	5,447	5,161	\$ 24,311,430	\$ 4,463.27	\$ 4,710.60		
Heat Pump Replacement	Home	254	100%	250	100%	\$	1,069,907	100%	-	0%	-	0%	\$	-	0%	254	250	\$ 1,069,907	\$ 4,212.23	\$ 4,279.63		
Evaporative Coolers (Installation)	Home	9,737	100%	9,737	100%	\$	10,296,273	100%	-	0%	-	0%	\$	-	0%	9,737	9,737	\$ 10,296,273	\$ 1,057.44	\$ 1,057.44		
Duct Testing and Sealing	Home	5,280	100%	5,280	100%	\$	1,189,690	100%	-	0%	-	0%	\$	-	0%	5,280	5,280	\$ 1,189,690	\$ 225.32	\$ 225.32		
Smart Thermostat	Each	1,280	100%	1,201	100%	\$	405,076	100%	-	0%	-	0%	\$	-	0%	1,280	1,201	\$ 405,076	\$ 316.47	\$ 337.28		
MF CAM - Central AC	Home	-	0%	-	0%	\$	-	0%	6	0%	3	100%	\$	24,863.05	100%	6	3	\$ 24,863	\$ 4,143.84	\$ 8,287.68		
MF CAM - Duct Test & Seal	Home	-	0%	-	0%	\$	-	0%	2	0%	2	100%	\$	690.00	100%	2	2	\$ 690	\$ 345.00	\$ 345.00		
MF CAM - Smart Thermostat	Each	-	0%	-	0%	\$	-	0%	3	0%	2	100%	\$	960.00	100%	3	2	\$ 960	\$ 320.00	\$ 480.00		
<b>Maintenance</b>																						
Furnace Clean and Tune		-	0%	-	0%	\$	-	0%	-	0%	-	0%	\$	-	0%	-	-	\$	-	\$	-	\$
Central A/C Tune-up		-	0%	-	0%	\$	-	0%	-	0%	-	0%	\$	-	0%	-	-	\$	-	\$	-	\$
Evaporative Cooler Maintenance		-	0%	-	0%	\$	-	0%	-	0%	-	0%	\$	-	0%	-	-	\$	-	\$	-	\$
<b>Lighting</b>																						
Compact Fluorescent Lights (CFLs)	Each	345	96%	63	97%	\$	2,424	96%	14	4%	2	3%	\$	102.28	4%	359	65	\$ 2,526	\$ 7.04	\$ 38.86		
Exterior Hard wired CFL fixtures	Each	14	100%	7	100%	\$	1,260	100%	-	0%	-	0%	\$	-	0%	14	7	\$ 1,260	\$ 90.00	\$ 180.00		
Exterior Hard wired LED fixtures	Each	601	100%	334	100%	\$	52,056	100%	-	0%	-	0%	\$	-	0%	601	334	\$ 52,056	\$ 86.62	\$ 155.86		
Torchiere	Each	1	100%	1	100%	\$	56	100%	-	0%	-	0%	\$	-	0%	1	1	\$ 56	\$ 56.47	\$ 56.47		
LED A-Lamps	Each	651,027	89%	79,523	90%	\$	6,046,882	89%	83,810	11%	8,513	10%	\$	716,739.64	11%	734,837	88,036	\$ 6,763,622	\$ 9.20	\$ 76.83		
LED Reflector Bulb	Each	8,746	75%	1,484	73%	\$	72,870	75%	2,952	25%	539	27%	\$	24,701.94	25%	11,698	2,023	\$ 97,572	\$ 8.34	\$ 48.23		
Torchiere - LED	Each	30,352	89%	22,116	90%	\$	2,129,953	89%	3,595	11%	2,583	10%	\$	249,914.13	11%	33,947	24,699	\$ 2,379,867	\$ 70.11	\$ 96.35		
MF CAM - LED A-Lamp	Each	-	0%	-	0%	\$	-	0%	24	100%	1	100%	\$	184.80	100%	24	1	\$ 185	\$ 7.70	\$ 184.80		
MF CAM - LED Exit Sign	Each	-	0%	-	0%	\$	-	0%	1	100%	1	100%	\$	87.00	100%	1	1	\$ 87	\$ 87.00	\$ 87.00		
MF CAM - LED Exterior Fixtures	Each	-	0%	-	0%	\$	-	0%	145	100%	3	100%	\$	11,019.00	100%	145	3	\$ 11,019	\$ 75.99	\$ 3,673.00		
MF CAM - LED Interior Fixtures	Each	-	0%	-	0%	\$	-	0%	18	100%	3	100%	\$	1,422.00	100%	18	3	\$ 1,422	\$ 79.00	\$ 474.00		
MF CAM - LED PL-Lamps	Each	-	0%	-	0%	\$	-	0%	7	100%	1	100%	\$	105.00	100%	7	1	\$ 105	\$ 15.00	\$ 105.00		
MF CAM - LED Pool & Spa Lighting	Each	-	0%	-	0%	\$	-	0%	5	100%	3	100%	\$	3,550.00	100%	5	3	\$ 3,550	\$ 710.00	\$ 1,183.33		
MF CAM - LED Reflector Lamp	Each	-	0%	-	0%	\$	-	0%	4	100%	1	100%	\$	52.80	100%	4	1	\$ 53	\$ 13.20	\$ 52.80		
MF CAM - LED T-Lamp	Each	-	0%	-	0%	\$	-	0%	260	100%	3	100%	\$	4,355.00	100%	260	3	\$ 4,355	\$ 16.75	\$ 1,451.67		
<b>Miscellaneous</b>																						
Pool Pumps	Home	1,923	100%	1,923	100%	\$	2,302,906	100%	-	0%	-	0%	\$	-	0%	1,923	1,923	\$ 2,302,906	\$ 1,197.56	\$ 1,197.56		
MF CAM - Pool Pump	Home	-	0%	-	0%	\$	-	0%	3	100%	2	100%	\$	4,378.47	100%	3	2	\$ 4,378	\$ 1,459.49	\$ 2,189.24		
Smart Power Strips - Tier 1	Home	84,354	96%	43,459	95%	\$	3,648,702	96%	3,962	4%	2,251	5%	\$	161,869.78	4%	88,316	45,710	\$ 3,810,572	\$ 43.15	\$ 83.36		
Smart Power Strips - Tier 2	Each	36,618	86%	20,615	87%	\$	2,339,108	86%	6,164	14%	3,109	13%	\$	383,212.36	14%	42,782	23,724	\$ 2,722,321	\$ 63.63	\$ 114.75		
<b>Customer Enrollment</b>																						
Outreach & Assessment	Home	95,623	0%	95,623	90%	\$	7,294,852	92%	10,892	0%	10,892	10%	\$	656,403.00	8%	106,515	106,515	\$ 7,951,255	\$ 74.65	\$ 74.65		
In-Home Education	Home	82,517	0%	82,519	91%	\$	2,044,435	92%	7,711	0%	7,711	9%	\$	187,725.00	8%	90,228	90,230	\$ 2,232,160	\$ 24.74	\$ 24.74		

Note:

[1] Summary data which includes ESA Program and MF Common Area efforts.

**Southern California Edison Company - PY 2019 Energy Savings Assistance Program Annual Report**  
**ESAP Table 7**  
**Expenditures Recorded by Cost Element [1]**

<b>ESA Program:</b>	<b>Labor</b>	<b>Non-Labor</b>	<b>Contractor</b>	<b>Total</b>
Energy Efficiency				
Appliances	\$ -	\$ -	\$ 16,314,064	\$ 16,314,064
Domestic Hot Water	\$ -	\$ -	\$ 4,843	\$ 4,843
Enclosure	\$ -	\$ -	\$ 145,515	\$ 145,515
HVAC	\$ -	\$ -	\$ 38,006,906	\$ 38,006,906
Maintenance	\$ -	\$ -	\$ -	\$ -
Lighting	\$ -	\$ -	\$ 9,296,960	\$ 9,296,960
Miscellaneous	\$ -	\$ -	\$ 8,835,798	\$ 8,835,798
Customer Enrollment	\$ -	\$ -	\$ 7,926,355	\$ 7,926,355
In Home Education	\$ -	\$ -	\$ 2,227,469	\$ 2,227,469
Pilot	\$ -	\$ -	\$ 14,862	\$ 14,862
Multifamily Common Area Measures	\$ -	\$ -	\$ 51,667	\$ 51,667
<b>Energy Efficiency TOTAL</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 82,824,439</b>	<b>\$ 82,824,439</b>
Training Center	\$ 102,409	\$ 55,834	\$ -	\$ 158,243
Inspections	\$ 56,940	\$ 7,482	\$ 1,229,800	\$ 1,294,222
Marketing and Outreach	\$ -	\$ 253,442	\$ 922,420	\$ 1,175,862
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
Measurement and Evaluation Studies	\$ -	\$ 1,193	\$ 202,500	\$ 203,693
Regulatory Compliance	\$ 379,474	\$ 18,265	\$ 94,786	\$ 492,525
General Administration	\$ 1,926,212	\$ 775,347	\$ 1,443,981	\$ 4,145,539
CPUC Energy Division	\$ -	\$ 64,391		\$ 64,391
<b>TOTAL PROGRAM COSTS</b>	<b>\$ 2,465,035</b>	<b>\$ 1,175,953</b>	<b>\$ 86,717,926</b>	<b>\$ 90,358,914</b>

Note:

[1] Summary data which includes ESA Program and MF Common Area efforts.

**Southern California Edison Company - PY 2019 Energy Savings Assistance Program Annual Report**  
**ESAP Table 8**  
**ESAP Homes Unwilling / Unable to Participate**

County	Reason Provided						
	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
Inyo	0	0	0	3	0	16	20
Kern	6	23	0	95	26	427	1,657
Kings	15	31	0	20	6	18	634
Los Angeles	49	129	0	1,929	356	6,828	21,329
Mono	0	0	0	3	1	3	3
Orange	23	35	0	498	113	1,745	7,110
Riverside	112	212	0	865	198	1,376	7,968
San Bernardino	169	406	1	1,251	231	2,636	12,603
San Diego	0	0	0	0	0	0	1
Santa Barbara	0	0	0	0	6	0	69
Tulare	75	141	0	105	26	142	2,613
Ventura	5	12	1	44	39	192	806
<b>Total</b>	<b>454</b>	<b>989</b>	<b>2</b>	<b>4,813</b>	<b>1,002</b>	<b>13,383</b>	<b>54,813</b>

[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.

**ESAP Coordinated Treatment (SCE and SCG only)**

Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency [1]						
# of Households Received Measures from one Utility, but not other Utility or Partnering Agency <sup>[1]</sup>	# 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 <sup>[2]</sup>	
29,017	159	273	-	30	28,555	
<b>Total</b>	<b>159</b>	<b>273</b>	<b>-</b>	<b>30</b>	<b>28,555</b>	

Note:

[1] Excludes households for which a joint premise could not be found due to address normalization limitations between SCE and SCG.

[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 enrolled, but no measures were provided.

**Southern California Edison - PY 2019 Energy Savings Assistance Program Annual Report**

ESAP Table 9

**Life Cycle Bill Savings by Measure [1]**

<b>Measure Description</b>		<b>2019 Number Installed</b>	<b>Per Measure Electric Impact (kWh)</b>	<b>Per Measure Gas Impact (Therms)</b>	<b>Effective Useful Life (EUL)</b>	<b>2019 Total Measure Life Cycle Bill Savings</b>
<b>Appliances</b>						
Refrigerators	Home	13,903	589.87	-	14.00	\$ 11,333,594
Freezer	Each	23	848.00	-	11.00	\$ 22,619
<b>Domestic Hot Water</b>						
Other Hot Water	Home	441	129.35	-	10.00	\$ 61,498
Tank and Pipe Insulation	Home	21	56.52	-	7.00	\$ 959
<b>Enclosure</b>						
Air Sealing / Envelope	Home	664	69.91	-	11.00	\$ 53,834
Attic Insulation	Home	5	172.00	-	18.00	\$ 1,404
<b>HVAC</b>						
Room A/C Replacement	Home	666	(154.27)	-	9.00	\$ -
Central A/C Replacement	Home	5,161	327.67	-	15.00	\$ 2,450,656
Heat Pump Replacement	Home	250	1,321.82	-	15.00	\$ 478,880
Evaporative Coolers (Installation)	Home	9,737	558.32	-	15.00	\$ 7,878,170
Duct Testing and Sealing	Home	5,280	1.02	-	18.00	\$ 8,790
Smart Thermostat	Each	1,280	337.07	-	9.10	\$ 428,149
MF CAM - Central AC	Home	2	852.00	-	15.00	\$ 2,469
MF CAM - Duct Test & Seal	Home	2	-	-	18.00	\$ -
MF CAM - Smart Thermostat	Each	3	297.56	-	9.10	\$ 886
<b>Maintenance</b>						
Furnace Clean and Tune						\$ -
Central A/C Tune-up						\$ -
Evaporative Cooler Maintenance						\$ -
<b>Lighting</b>						
Compact Fluorescent Lights (CFLs)	Each	359	16.69	-	9.40	\$ 5,946
Exterior Hard wired CFL fixtures	Each	14	35.00	-	16.00	\$ 741
Exterior Hard wired LED fixtures	Each	601	18.24	-	16.00	\$ 16,583
Torchiere	Each	1	95.76	-	16.00	\$ 145
LED A-Lamps	Each	734,837	38.82	-	16.00	\$ 43,162,034
LED Reflector Bulb	Each	11,698	21.41	-	16.00	\$ 379,013
LED Torchiere	Each	33,947	71.16	-	16.00	\$ 3,655,349
MF CAM - LED A-Lamp	Each	24	228.58	-	3.30	\$ 2,086
MF CAM - LED Exit Sign	Each	1	360.34	-	16.00	\$ 545
MF CAM - LED Exterior Fixtures	Each	145	52.95	-	12.00	\$ 9,501
MF CAM - LED Interior Fixtures	Each	18	22.87	-	3.26	\$ 157
MF CAM - LED PL-Lamps	Each	7	76.46	-	3.30	\$ 203
MF CAM - LED Pool & Spa Lighting	Each	5	876.00	-	4.88	\$ 2,168
MF CAM - LED Reflector Lamp	Each	4	160.23	-	3.26	\$ 244
MF CAM - LED T-Lamp	Each	260	-	-	5.00	\$ -
<b>Miscellaneous</b>						
Pool Pumps	Home	1,923	1,030.29	-	10.00	\$ 2,135,906
MF CAM - Pool Pump	Home	2	9,238.85	-	10.00	\$ 19,920
Smart Power Strips - Tier 1	Home	45,712	0.50	-	5.00	\$ 13,704
Smart Power Strips - Tier 2	Each	42,782	139.02	-	5.00	\$ 3,595,101
<b>Total Homes Served By the Program</b>		95,397				
<b>Life Cycle Bill Savings Per Home</b>		\$ 794				

Note:

[1] Summary data which includes ESA Program and MF common area efforts.

**Southern California Edison - PY 2019 Energy Savings Assistance Program  
Annual Report  
ESAP Table 10**

**Energy Rate Used for Bill Savings Calculations [1][2]**

Year	\$/kWh	\$/Therm
2019	0.13	0.00
2020	0.14	0.00
2021	0.14	0.00
2022	0.15	0.00
2023	0.15	0.00
2024	0.15	0.00
2025	0.16	0.00
2026	0.16	0.00
2027	0.17	0.00
2028	0.17	0.00
2029	0.18	0.00
2030	0.18	0.00
2031	0.19	0.00
2032	0.20	0.00
2033	0.20	0.00
2034	0.21	0.00
2035	0.21	0.00
2036	0.22	0.00
2037	0.23	0.00
2038	0.23	0.00
2039	0.24	0.00
2040	0.25	0.00
2041	0.25	0.00
2042	0.25	0.00
2043	0.26	0.00

Notes:

[1] Summary data which includes ESA Program and MF Common Area efforts.

[2] For 2019, the average cost per kWh and therm paid by ESA participants is shown. Cost is escalated 3% annually for remaining years.

**Southern California Edison- PY 2019 Energy Savings Assistance Program Annual Report**  
**ESAP Table 11**  
**Bill Savings Calculations by Program Year [1]**

<b>Program Year</b>	<b>Program Costs</b>	<b>Program Lifecycle Bill Savings</b>	<b>Program Bill Savings/Cost Ratio</b>	<b>Per Home Average Lifecycle Bill Savings</b>
2013	\$ 55,604,816	\$ 40,191,998	0.72	\$ 582
2014	\$ 55,886,233	\$ 39,869,484	0.71	\$ 518
2015	\$ 51,068,549	\$ 36,544,121	0.72	\$ 675
2016	\$ 56,095,969	\$ 33,470,336	0.60	\$ 815
2017	\$ 61,120,956	\$ 41,459,029	0.68	\$ 516
2018	\$ 67,817,718	\$ 63,225,275	0.93	\$ 733
2019	\$ 90,358,914	\$ 75,721,253	0.84	\$ 794

Note:

[1] Summary data which includes ESA Program and MF Common Area efforts.

**Southern California Edison- PY 2019 Energy Savings Assistance Program Annual Report**  
**ESAP Table 12**

Date	Program Year 2019	Budget <sup>1</sup>			Expenditures			(Shift) or Carried Forward (Budget - Expenditures = Variance)			Among Categories within Program Year 1-3			Carry Forward from 2017 & 2018			Carry Back from 2020			Total Shifted Gas/ Electric <sup>4</sup>	% 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 Authorized	Electric	Gas	Total Expenditures <sup>7</sup>	Variance			(1) Shift of Current Year Authorized			(2) Shift of Carry Forward			(3) Shift of Carry Back														
								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																														
	Appliances <sup>[3]</sup>	\$ 21,628,600	\$ -	\$ 21,628,600	\$ 16,314,064	\$ -	\$ 16,314,064	\$ 5,314,536	\$ -	\$ 5,314,536	\$ (5,314,536)	\$ -	\$ (5,314,536)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (5,314,536)	0%	3.	1.	1.	1.	1.					
	Domestic Hot Water	\$ 31,348	\$ -	\$ 31,348	\$ 4,843	\$ -	\$ 4,843	\$ 26,505	\$ -	\$ 26,505	\$ (26,505)	\$ -	\$ (26,505)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (26,505)	0%	3.	1.	1.	1.	1.					
	Enclosure	\$ 218,022	\$ -	\$ 218,022	\$ 145,515	\$ -	\$ 145,515	\$ 72,507	\$ -	\$ 72,507	\$ (72,507)	\$ -	\$ (72,507)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (72,507)	0%	3.	1.	1.	1.	1.					
	HVAC	\$ 24,897,305	\$ -	\$ 24,897,305	\$ 29,035,879	\$ -	\$ 29,035,879	\$ (4,138,574)	\$ -	\$ (4,138,574)	\$ 4,138,574	\$ -	\$ 4,138,574	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,138,574	0%	3.	1.	1.	1.	1.					
	Maintenance	\$ 100,220	\$ -	\$ 100,220	\$ -	\$ -	\$ -	\$ 100,220	\$ -	\$ 100,220	\$ (100,220)	\$ -	\$ (100,220)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (100,220)	0%	3.	1.	1.	1.	1.					
	Lighting	\$ 1,013,054	\$ -	\$ 1,013,054	\$ 9,296,960	\$ -	\$ 9,296,960	\$ (8,283,906)	\$ -	\$ (8,283,906)	\$ 8,283,906	\$ -	\$ 8,283,906	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,283,906	0%	3.	1.	1.	1.	1.					
	Miscellaneous	\$ 2,631,912	\$ -	\$ 2,631,912	\$ 6,113,478	\$ -	\$ 6,113,478	\$ (3,481,566)	\$ -	\$ (3,481,566)	\$ 3,481,566	\$ -	\$ 3,481,566	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,481,566	-77.4%	3.	1.	1.	1.	1.					
	Customer Enrollment	\$ 4,489,283	\$ -	\$ 4,489,283	\$ 7,926,355	\$ -	\$ 7,926,355	\$ (3,437,072)	\$ -	\$ (3,437,072)	\$ 3,437,072	\$ -	\$ 3,437,072	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,437,072	0%	3.	1.	1.	1.	1.					
	In Home Education	\$ 1,457,578	\$ -	\$ 1,457,578	\$ 2,227,469	\$ -	\$ 2,227,469	\$ (769,891)	\$ -	\$ (769,891)	\$ 769,891	\$ -	\$ 769,891	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 769,891	-17.1%	3.	1.	1.	1.	1.					
	Pilot	\$ -	\$ -	\$ -	\$ 14,862	\$ -	\$ 14,862	\$ (14,862)	\$ -	\$ (14,862)	\$ 14,862	\$ -	\$ 14,862	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14,862	0%	3.	1.	1.	1.	1.					
	Fund Shifting Offset																														
	<b>Energy Efficiency TOTAL</b>	<b>\$ 56,467,322</b>	<b>\$ -</b>	<b>\$ 56,467,322</b>	<b>\$ 71,079,423</b>	<b>\$ -</b>	<b>\$ 71,079,423</b>	<b>\$ (14,612,101)</b>	<b>\$ -</b>	<b>\$ (14,612,101)</b>	<b>\$ 14,612,102</b>	<b>\$ -</b>	<b>\$ 14,612,102</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 14,612,102</b>	<b>-324.7%</b>	<b>3.</b>	<b>1.</b>	<b>1.</b>	<b>1.</b>	<b>1.</b>					
	Training Center	\$ 539,344	\$ -	\$ 539,344	\$ 158,243	\$ -	\$ 158,243	\$ 381,101	\$ -	\$ 381,101	\$ (381,101)	\$ -	\$ (381,101)	\$ 386,652	\$ -	\$ 386,652	\$ -	\$ -	\$ -	\$ 5,551	0%	3.	1.	1.	1.	1.					
	Inspections	\$ 1,151,406	\$ -	\$ 1,151,406	\$ 1,294,222	\$ -	\$ 1,294,222	\$ (142,816)	\$ -	\$ (142,816)	\$ 142,816	\$ -	\$ 142,816	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 142,816	#DIV/0!	3.	1.	1.	1.	1.					
	Marketing and Outreach	\$ 950,000	\$ -	\$ 950,000	\$ 1,175,862	\$ -	\$ 1,175,862	\$ (225,862)	\$ -	\$ (225,862)	\$ 225,862	\$ -	\$ 225,862	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 225,862	#DIV/0!	3.	1.	1.	1.	1.					
	Statewide ME&O	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!	3.	1.	1.	1.	1.						
	ME&E Studies	\$ 91,250	\$ -	\$ 91,250	\$ 203,693	\$ -	\$ 203,693	\$ (112,443)	\$ -	\$ (112,443)	\$ 112,443	\$ -	\$ 112,443	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 112,443	#DIV/0!	3.	1.	1.	1.	1.					
	Regulatory Compliance	\$ 478,313	\$ -	\$ 478,313	\$ 492,525	\$ -	\$ 492,525	\$ (14,212)	\$ -	\$ (14,212)	\$ 14,212	\$ -	\$ 14,212	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14,212	0%	3.	1.	1.	1.	1.					
	General Administration	\$ 3,879,027	\$ -	\$ 3,879,027	\$ 4,145,539	\$ -	\$ 4,145,539	\$ (266,512)	\$ -	\$ (266,512)	\$ 266,512	\$ -	\$ 266,512	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 266,512	0%	3.	1.	1.	1.	1.					
	CPUJC Energy Division	\$ 60,000	\$ -	\$ 60,000	\$ 64,391	\$ -	\$ 64,391	\$ (4,391)	\$ -	\$ (4,391)	\$ 4,391	\$ -	\$ 4,391	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,391	0%	3.	1.	1.	1.	1.					
	<b>Total 2019 Authorized New Fund</b>	<b>\$ 63,616,662</b>	<b>\$ -</b>	<b>\$ 63,616,662</b>	<b>\$ 78,613,898</b>	<b>\$ -</b>	<b>\$ 78,613,898</b>	<b>\$ (14,997,236)</b>	<b>\$ -</b>	<b>\$ (14,997,236)</b>	<b>\$ 14,245,213</b>	<b>\$ -</b>	<b>\$ 14,245,213</b>	<b>\$ 1,138,676</b>	<b>\$ -</b>	<b>\$ 1,138,676</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 15,383,889</b>	<b>-341.9%</b>										
	Authorized Unspent/Uncommitted Fund to be spent in 2019																														
	Multi-Family Common Area Measures	\$ 4,500,000	\$ -	\$ 4,500,000	\$ 51,667	\$ -	\$ 51,667	\$ 4,448,333	\$ -	\$ 4,448,333	\$ (4,448,333)	\$ -	\$ (4,448,333)	\$ 1,104,945	\$ -	\$ 1,104,945	\$ -	\$ -	\$ -	\$ -	\$ (3,343,388)										
	Leveraging - CSD	\$ 1,000,000	\$ -	\$ 1,000,000	\$ -	\$ -	\$ -	\$ 1,000,000	\$ -	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!	3.	2.	2.	2.	2.						
	Climate Zone 13 Central AC and AC related measures	\$ 6,666,260																													

**Southern California Edison Company - PY 2019 Energy Savings Assistance Program Annual Report**  
**ESAP Table 13**  
**Categorical and Other Enrollment [1]**

Type of Enrollment	Number of Homes Treated
Women, Infants, and Children Program (WIC)	5,864
Supplemental Security Income (SSI)	3,487
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	3,347
CalWORKs/Temporary Assistance for Needy Families (TANF)	326
Tribal TANF	4
Medicaid/Medi-Cal for Families	22,330
Healthy Families A&B	-
National School Lunch Program (NSLP) - Free Lunch	641
Low-income Home Energy Assistance Program (LIHEAP)	23
Bureau of Indian Affairs General Assistance	-
Head Start Income Eligible - (Tribal Only)	-
Targeted Self Certification	-
Other - Categorical	36,388
Standard Enrollment	22,987
<b>Total</b>	<b>95,397</b>

Note: does not include MF common area efforts.

[1] Summary data which includes ESA Program efforts.

**Southern California Edison Company - PY 2019 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 (kWh) [3]	Other Measureable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
Leveraging, Program Coordination, Datassharing	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	\$ 960	46,320	N	80		Y	
Leveraging, Datassharing	Other IOU ESA Programs (SCG, PG&E, SWG, Datassharing)	IOUs share lists of homes served in joint territories.	Y	Y	\$ 142,608	6,880,836	N	11,884		Y	
Program Coordination	Joint Contractor Across Programs	SCE used existing CMHP (Mobile Home program) contractor to jointly complete ESA applications and assessments for Mobile Homes.	Y	Y	N/A	3,511,056	N	6,064		N	This combination likely enhanced perceived value of both programs to potential participants when being asked to participate.

Notes:

[1] Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, MEKO, etc.

[2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).

In 2019 SCE spent approximately \$12 per Treated lead through marketing and outreach efforts. a) G.A.: 80 homes x \$12 per home = \$960. b) 11,884 Treated homes through other IOUs' ESA/low income programs at \$12 per saved lead = \$142,608. In 2019 SCE spent on average \$0.33 for each piece of collateral.

[3] Energy savings/benefits: Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households. Average kWh saved per Treated home in PY2019 is 579 kWh as calculated from ESA Table 2 of this report: 55,278,429 kWh / 95,397 treated homes = 579kWh/home. a) 80 ESA homes treated with Grid Alternatives 579 kWh/Home = 46,320 kWh. b) 11,884 ESA homes treated via IOU datassharing x 579kWh/Home = 6,880,836 kWh. c) 6,064 ESA Homes by CMHP Contractor x 579 kWh/Home = 3,511,056 kWh.

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

[5] Savings are calculated based on SCE Ex-Ante analysis of DNV-GL ESA Program 2015-2017 Impact Evaluation Final Report, or SCE workpapers.

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

## **ESAP Direct Purchases & Installation Contractors**

### **ESAP Table 15**

#### **Lighting [4]**

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]
2009	62,624	33,642	4.2	2,269,248
2010	121,868	49,982	4.9	3,948,768
2011	93,771	54,615	4.9	4,529,616
2012	49,026	44,872	4.2	3,661,426
2013	69,031	61,471	4.2	6,493,686
2014	76,983	67,444	4.0	6,811,448
2015	54,127	43,258	4.9	4,449,325
2016	41,070	40,820	7.1	4,790,255
2017	80,333	45,185	5.3	3,959,404
2018	86,307	1	0.0	96
2019	95,397	-	0.0	-

## Notes:

[1] Bulb cost and admin cost were combined effective 2013.

[2] Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?

Do all models comply with Europe's RoHS standards on toxicity?

[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.

[4] Summary data which includes ESA Program and MF efforts.

[5] This Table should be used for 2017 and not applicable with 2018 activity pursuant to D.16-11-022 directive.

\*CFL installation was discontinued in 2018

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ESAP Table 16  
"Add Back" Measures

Measure [1][2]	Climate Zone	ESACET	Resouce TRC	Quantity Installed	Ratio of Benefits Over Costs	
					Budget Impact of "Add Back"	Lifecycle Bill Savings Impact
Central AC - Mobile Home	13	0.19	0.20	24	\$ 90,889	\$ 10,866
Central AC - Mobile Home	14	0.19	0.20	128	\$ 493,983	\$ 59,840
Central AC - Mobile Home	15	0.21	0.22	154	\$ 606,053	\$ 73,477
Central AC - Multi Family	13	0.26	0.27	5	\$ 23,553	\$ 4,116
Central AC - Multi Family	14	0.28	0.30	78	\$ 321,130	\$ 63,521
Central AC - Multi Family	15	0.31	0.34	48	\$ 196,013	\$ 38,768
Central AC - Single Family	13	0.15	0.15	1,662	\$ 8,482,651	\$ 773,398
Central AC - Single Family	14	0.16	0.16	2,486	\$ 11,471,707	\$ 1,150,934
Central AC - Single Family	15	0.18	0.19	576	\$ 2,625,451	\$ 275,736
Central Heat Pump - Mobile Home	15	0.25	0.27	2	\$ 9,929	\$ 3,275
Central Heat Pump - Multi Family	15	0.42	0.45	103	\$ 407,588	\$ 227,473
Central Heat Pump - Single Family	13	0.23	0.24	10	\$ 55,565	\$ 16,811
Central Heat Pump - Single Family	14	0.31	0.33	93	\$ 392,912	\$ 160,002
Central Heat Pump - Single Family	15	0.27	0.28	42	\$ 203,913	\$ 71,319
Enclosure - Mobile Home	9	0.70	0.83	1	\$ 400	\$ 227
Enclosure - Mobile Home	10	1.04	1.36	5	\$ 339	\$ 341
Enclosure - Mobile Home	14	1.05	1.39	13	\$ 1,411	\$ 1,365
Enclosure - Mobile Home	15	0.83	1.03	3	\$ 346	\$ 227
Enclosure - Mobile Home	16	0.79	0.96	4	\$ 274	\$ 227
Enclosure - Multi Family	6	0.07	0.07	39	\$ 3,641	\$ 176
Enclosure - Multi Family	8	0.01	0.01	153	\$ 19,794	\$ 129
Enclosure - Multi Family	9	0.02	0.02	83	\$ 12,260	\$ 173
Enclosure - Multi Family	10	0.17	0.18	14	\$ 1,123	\$ 146
Enclosure - Multi Family	13	-	-	1	\$ 119	\$ -
Enclosure - Multi Family	14	-	-	14	\$ 1,395	\$ -
Enclosure - Multi Family	15	1.44	2.17	64	\$ 6,921	\$ 9,570
Enclosure - Multi Family	16	-	-	6	\$ 523	\$ -
Enclosure - Single Family	6	1.07	1.42	27	\$ 3,989	\$ 3,769
Enclosure - Single Family	8	0.91	1.15	23	\$ 3,217	\$ 2,575
Enclosure - Single Family	9	1.22	1.70	35	\$ 4,285	\$ 4,968
Enclosure - Single Family	10	1.03	1.34	53	\$ 6,872	\$ 6,819
Enclosure - Single Family	13	0.68	0.81	12	\$ 2,451	\$ 1,307
Enclosure - Single Family	14	0.85	1.06	59	\$ 12,246	\$ 9,013
Enclosure - Single Family	15	1.63	2.64	41	\$ 6,430	\$ 10,810
Enclosure - Single Family	16	0.70	0.82	13	\$ 2,635	\$ 1,875
Room AC - Mobile Home	10	(0.10)	(0.10)	70	\$ 68,271	\$ (11,809)
Room AC - Mobile Home	13	(0.07)	(0.07)	24	\$ 32,376	\$ (3,595)
Room AC - Mobile Home	14	(0.09)	(0.09)	26	\$ 25,909	\$ (3,912)
Room AC - Mobile Home	15	(0.13)	(0.13)	20	\$ 21,737	\$ (3,374)
Room AC - Multi Family	10	0.13	0.13	21	\$ 19,918	\$ -
Room AC - Multi Family	13	0.14	0.14	3	\$ 2,689	\$ -
Room AC - Multi Family	14	0.13	0.13	3	\$ 2,879	\$ -
Room AC - Multi Family	15	0.13	0.13	1	\$ 981	\$ -
Room AC - Single Family	10	(0.09)	(0.09)	212	\$ 212,504	\$ (34,701)
Room AC - Single Family	13	(0.08)	(0.08)	188	\$ 246,707	\$ (28,762)
Room AC - Single Family	14	(0.11)	(0.11)	85	\$ 82,766	\$ (13,907)
Room AC - Single Family	15	(0.10)	(0.10)	13	\$ 17,795	\$ (2,193)

Notes:

- [1] Based on Appendix J.1 and J.2 in D.12-08-044 and D.14-08-030.
- [2] Summary data which includes ESA Program and MF Common Area efforts.

**Southern California Edison - PY 2019 Energy Savings Assistance Program Annual Report**

**ESAP Table 17**

**Expenditures for Pilots and Studies**

	Authorized 2019 Funding			2019 Expenses			% of Budget Expensed		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
<b>Pilots</b>									
Programmable Controllable Thermostat	\$ 300,500		\$ 300,500	\$ 14,862		\$ 14,862	5%		5%
<b>Total Pilots</b>	<b>\$300,500</b>		<b>\$300,500</b>	<b>\$14,862</b>		<b>\$14,862</b>	<b>5%</b>		<b>5%</b>
<b>Studies</b>									
Non Energy Benefits (NEB) Study	\$ 45,000		\$ 45,000	\$ 45,000		\$ 45,000	100.00%		100.00%
Rapid Feedback Research and Analysis	\$ 200,000		\$ 200,000	\$ -		\$ -	-		0.00%
Low Income Needs Assessment Study	\$ 150,000		\$ 150,000	\$ 146,245		\$ 146,245	97.50%		97.50%
Load Impact Evaluation Study	\$ 165,000		\$ 165,000	\$ 164,998		\$ 164,998	100.00%		100.00%
2017 Potential and Goals Study	\$ 90,000		\$ 90,000	\$ -		\$ -	-		0.00%
<b>Total Studies</b>	<b>\$650,000</b>		<b>\$650,000</b>	<b>\$356,243</b>		<b>\$356,243</b>	<b>54.81%</b>		<b>54.81%</b>

Note:

1. Report excludes pilot costs incurred by the joint IOU evaluation consultant. The evaluation contract is held by PG&E. No costs have been cross-billed to SCE.

**Southern California Edison Company - PY 2019 Energy Savings Assistance Program Annual Report**

**ESAP Table 18**

**I 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	100	1795

Measures	Units	Households that Only Received Education
In-Home Education	Home	9,479

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
94,606	5,472	2,616

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

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



Southern California Edison - PY 2019 CARE Annual Report							
CARE Table 1							
Category	Overall Expenditures		Total	Authorized Budget	% of Budget Spent	Total Shifted	Shifted to/from?
	Electric	Gas					
Outreach	\$2,964,235	\$0	\$2,964,235	\$ 2,964,235	100%	\$279,392	From IT Programming
Processing, Certification, Recertification	\$911,857	\$0	\$911,857	\$ 911,857	100%	\$111,857	From IT Programming
Post Enrollment Verification	\$581,473	\$0	\$581,473	\$ 600,000	97%		
IT Programming							To Outreach, Processing, Certification, Recertification, and General Admin
	\$103,094	\$0	\$103,094	\$ 190,337	54%	(\$409,663)	
Cool Centers	\$28,488	\$0	\$28,488	\$ 44,562	64%		
Pilots (CHANGES)	\$357,043	\$0	\$357,043	\$ 525,000	68%		
Studies	\$0	\$0	\$0	\$150,000	0%		
Measurement & Evaluation	\$0	\$0	\$0	\$0	0%		
Regulatory Compliance [3]	\$364,378	\$0	\$364,378	\$542,704	67%		
General Administration	\$722,943	\$0	\$722,943	\$722,943	100%	\$18,414	From IT Programming
CPUC Energy Division	\$122,234	\$0	\$122,234	\$140,000	87%		
<b>TOTAL Program Costs</b>	<b>\$6,155,745</b>	<b>\$0</b>	<b>\$6,155,745</b>	<b>\$6,791,638</b>	<b>91%</b>		
CARE Rate Discount	\$365,302,843	\$0	\$365,302,843	\$ 487,221,423	75%		
Service Establishment Charge Discount	\$0	\$0	\$0	\$0	0%		
<b>TOTAL PROGRAM COSTS &amp; CUSTOMER DISCOUNTS</b>	<b>\$371,458,588</b>	<b>\$0</b>	<b>\$371,458,588</b>	<b>\$494,013,061</b>	<b>75%</b>		

[1] This represented the authorized budget that approved on January 4, 2019, SCE 2018 Mid Cycle Advice Letter 3824-E. Due to the timing of the approval of AL 3824-E, the revenue collection for SCE's 2018 CARE Balancing Account was based on the authorized budget as per Resolution E-4885, \$7,007,628.

[2] CARE is a "Two-way" Balancing Account, Any over or under spent in CARE Balancing Account will be transferred to PPAM.

**Southern California Edison - PY 2019 CARE Annual Report**

**CARE Table 2**

**Enrollment, Recertification, Attrition, & Penetration**

	New Enrollment								Recertification				Attrition (Drop Offs)				Enrollment			Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)			
	Automatic Enrollment				Self-Certification (Income or Categorical)				Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response *	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)					
	Inter-Utility <sup>1</sup>	Intra-Utility <sup>2</sup>	Leveraging <sup>3</sup>	Combined (B+C+D)	Online	Paper	Phone	Capitation																	
January	3,751	216	0	3,967	5,159	4,912	5,473	9	15,553	19,520	16,742	12,718	0	29,460	10,416	3	725	10,441	21,585	48,980	-2,065	1,203,474	1,337,092	90%	
February	4,118	231	0	4,349	5,641	3,889	5,200	36	14,766	19,115	14,185	12,703	0	26,888	9,436	26	612	7,205	17,279	46,003	1,836	1,205,310	1,337,092	90%	
March	4,800	164	0	4,964	5,561	2,509	5,473	16	13,559	18,523	10,215	16,165	0	26,380	8,326	18	466	10,899	19,709	44,903	-1,186	1,204,124	1,337,092	90%	
April	3,951	311	0	4,262	4,571	2,805	4,493	28	11,697	15,959	10,286	13,220	0	23,506	8,791	120	457	18,328	27,696	39,465	-11,737	1,192,387	1,337,092	89%	
May	3,936	222	0	4,158	4,476	6,658	3,796	47	14,977	19,135	13,604	13,848	0	27,452	8,569	168	539	10,705	19,981	46,587	-846	1,191,541	1,337,092	89%	
June	3,212	243	0	3,455	4,706	6,889	3,770	121	15,486	18,941	12,502	12,039	0	24,541	10,334	98	528	10,101	21,061	43,482	-2,120	1,189,421	1,337,092	89%	
July	3,784	170	0	3,954	6,805	5,936	5,174	211	18,126	22,080	11,950	12,682	0	24,632	13,699	96	505	12,175	26,475	46,712	-4,395	1,185,026	1,337,092	89%	
August	3,454	263	0	3,737	6,713	6,913	6,744	96	22,466	26,203	12,738	14,240	0	26,978	15,195	114	516	4,319	20,144	53,181	6,059	1,191,085	1,337,092	89%	
September	2,831	352	0	3,183	7,791	6,226	5,902	53	19,974	23,157	12,964	14,325	0	27,289	8,691	87	533	27,885	37,196	50,446	-14,039	1,177,046	1,337,092	88%	
October	5,680	232	0	5,912	6,045	10,935	4,453	117	21,550	27,462	13,542	16,762	0	30,324	12,999	80	345	1,544	14,968	57,786	12,494	1,189,540	1,337,092	89%	
November	4,136	441	0	4,577	5,889	5,607	3,590	59	15,145	19,722	15,109	17,095	0	32,204	20,100	126	795	5,191	26,212	51,926	-6,490	1,183,050	1,337,092	88%	
December	3,809	469	0	4,278	6,317	8,003	3,679	102	18,101	22,379	13,607	15,236	0	28,843	21,804	108	457	-2,086	20,283	51,222	2,096	1,185,146	1,337,092	89%	
YTD Total	47,462	3,334	0	50,796	71,674	71,084	57,747	895	201,400	252,196	157,444	171,053	0	328,497	148,360	1,044	6,478	116,707	272,589	580,693	-20,393	1,185,146	1,337,092	89%	

<sup>1</sup> Enrollments via data sharing between the IOUs.

<sup>2</sup> Enrollments via data sharing between departments and/or programs within the utility.

<sup>3</sup> Enrollments via data sharing with programs outside the IOU that serve low-income customers.

\* No response includes no response to both Recertification and Verification.

Southern California Edison - PY 2019 CARE Annual Report								
CARE Table 3A - Post-Enrollment Verification Results (Model) 2019								
Month	Total CARE Households Enrolled	Households Requested to Verify <sup>1</sup>	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) <sup>2</sup>	Total Households De-enrolled <sup>3</sup>	% De-enrolled through Post Enrollment Verification <sup>4</sup>	% of Total CARE Households De-enrolled
January	1,203,474	5,273	0.4%	3,670	84	3,754	71.2%	0.3%
February	1,205,310	43	0.0%	17	0	17	39.5%	0.0%
March	1,204,124	6,152	0.5%	4,324	96	4,420	71.8%	0.4%
April	1,192,387	7,089	0.6%	5,106	112	5,218	73.6%	0.4%
May	1,191,541	8,285	0.7%	5,775	137	5,912	71.4%	0.5%
June	1,189,421	7,976	0.7%	5,725	101	5,826	73.0%	0.5%
July	1,185,026	8,479	0.7%	6,406	89	6,495	76.6%	0.5%
August	1,191,085	7,922	0.7%	5,727	104	5,831	73.6%	0.5%
September	1,177,046	5,831	0.5%	2,246	60	2,306	39.5%	0.2%
October	1,189,540	7,313	0.6%	86	50	136	1.9%	0.0%
November	1,183,050	132	0.0%	39	1	40	30.3%	0.0%
December	1,185,146	16,070	1.4%	13	15	28	0.2%	0.0%
YTD Total	1,185,146	80,565	6.8%	39,134	849	39,983	49.6%	3.4%

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

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

<sup>3</sup> 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

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

Southern California Edison - PY 2019 CARE Annual Report								
CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)								
Month	Total CARE Households Enrolled	Households Requested to Verify <sup>1</sup>	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) <sup>2</sup>	Total Households De-enrolled <sup>3</sup>	% De-enrolled through HUV Post Enrollment Verification	% of Total CARE Households De-enrolled
January	1,203,474	3,126	0.3%	2,979	9	2,988	95.6%	0.2%
February	1,205,310	0	0.0%	0	0	0	0.0%	0.0%
March	1,204,124	10,684	0.9%	9,977	95	10,072	94.3%	0.8%
April	1,192,387	1,430	0.1%	1,344	13	1,357	94.9%	0.1%
May	1,191,541	189	0.0%	170	2	172	91.0%	0.0%
June	1,189,421	467	0.0%	418	3	421	90.1%	0.0%
July	1,185,026	137	0.0%	122	2	124	90.5%	0.0%
August	1,191,085	754	0.1%	702	6	708	93.9%	0.1%
September	1,177,046	2,779	0.2%	1,518	31	1,549	55.7%	0.1%
October	1,189,540	1,320	0.1%	673	11	684	51.8%	0.1%
November	1,183,050	0	0.0%	0	0	0	0.0%	0.0%
December	1,185,146	734	0.1%	1	0	1	0.1%	0.0%
YTD Total	1,185,146	21,620	1.8%	17,904	172	18,076	83.6%	1.5%

<sup>1</sup> Includes all participants who were selected for high usage verification process.

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

<sup>3</sup> 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.

Southern California Edison - PY 2019 CARE Annual Report						
CARE Table 4						
CARE Self-Certification and Self-Recertification Applications <sup>1</sup>						
	Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total (Y-T-D)	1,136,011	927,892	567,105	90,757	146,680	270,030
Percentage	N/A	100%	61%	10%	N/A	29%

<sup>1</sup> Includes sub-metered customers.

Southern California Edison - PY 2019 CARE Annual Report									
CARE Table 5									
CARE Enrollment by County									
County	Estimated Eligible			Total Participants			Penetration Rate		
	Urban	Rural <sup>1</sup>	Total	Urban	Rural	Total	Urban	Rural	Total
Fresno	520	0	520	36	0	36	7%	0%	7%
Imperial	0	185	185	21	46	67	0%	25%	36%
Inyo	5	1,269	1,274	27	963	990	588%	76%	78%
Kern	13,028	17,209	30,237	9,188	13,633	22,821	71%	79%	75%
Kings	0	8,346	8,346	139	8,870	9,009	0%	106%	108%
Los Angeles	534,621	3,060	537,681	492,332	1,582	493,914	92%	52%	92%
Madera	3	0	3	0	0	0	0%	0%	0%
Mono	0	1,565	1,565	6	735	741	0%	47%	47%
Orange	199,929	0	199,929	149,883	0	149,883	75%	0%	75%
Riverside	97,341	92,884	190,225	81,929	86,445	168,374	84%	93%	89%
San Bernardino	188,658	36,341	224,999	185,108	36,851	221,959	98%	101%	99%
San Diego	0	1	1	0	0	0	0%	0%	0%
Santa Barbara	17,543	0	17,543	9,065	0	9,065	52%	0%	52%
Tulare	13,397	45,559	58,956	12,567	43,166	55,733	94%	95%	95%
Ventura	63,060	2,568	65,628	50,900	1,654	52,554	81%	64%	80%
<b>Total</b>	<b>1,128,104</b>	<b>208,988</b>	<b>1,337,092</b>	<b>991,201</b>	<b>193,945</b>	<b>1,185,146</b>	<b>88%</b>	<b>93%</b>	<b>89%</b>

<sup>1</sup> Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.

Southern California Edison - PY 2019 CARE Annual Report							
CARE Table 6							
CARE Recertification Results							
2017	Total CARE Households	Households Requested to Recertify <sup>1</sup>	% of Households Total (C/B)	Households Recertified <sup>2</sup>	Households De-enrolled <sup>3</sup>	Recertification Rate % <sup>4</sup> (E/C)	% of Total Households De-enrolled (F/B)
January	1,203,474	22,267	1.9%	12,995	9,163	58%	0.8%
February	1,205,310	17,512	1.5%	9,977	7,440	57.0%	0.6%
March	1,204,124	21,519	1.8%	11,910	9,434	55.3%	0.8%
April	1,192,387	20,311	1.7%	11,056	9,212	54.4%	0.8%
May	1,191,541	24,102	2.0%	12,992	11,047	53.9%	0.9%
June	1,189,421	23,775	2.0%	12,783	10,969	53.8%	0.9%
July	1,185,026	24,918	2.1%	12,365	12,485	49.6%	1.1%
August	1,191,085	31,697	2.7%	16,665	14,922	52.6%	1.3%
September	1,177,046	26,891	2.3%	13,560	11,388	50.4%	1.0%
October	1,189,540	29,639	2.5%	13,188	1,751	44.5%	0.1%
November	1,183,050	22,367	1.9%	7,718	847	34.5%	0.1%
December	1,185,146	25,285	2.1%	2,890	208	11.4%	0.0%
<b>YTD</b>	<b>1,185,146</b>	<b>290,283</b>	<b>24.5%</b>	<b>138,099</b>	<b>98,866</b>	<b>47.6%</b>	<b>8.3%</b>

<sup>1</sup> Excludes count of customers recertified through the probability model.

<sup>2</sup> Recertification results are tied to the month initiated and the recertification process allows customers 90 days (3 or 4 bill cycles) to respond to the

<sup>3</sup> Includes customers who did not respond or who requested to be de-enrolled.

<sup>4</sup> Percentage of customers recertified compared to the total participants requested to recertify in that month.

**Southern California Edison - PY 2019 CARE Annual Report**  
**CARE Table 7**

**CARE Capitation Contractors**

Contractor Name <sup>1</sup>	Contractor Type (Check one or more if applicable)				Enrollments <sup>2</sup>			Total Expenditures
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
2-1-1 ORANGE COUNTY		x			0	2	2	\$40
ALPHA ENTERPRISES		x			0	0	0	\$0
APAC SERVICE CENTER	x				0	10	10	\$200
ARMENIAN RELIEF SOCIETY	x				0	0	0	\$0
ASIAN AMERICAN DRUG ABUSE PROG	x				0	11	11	\$220
ASIAN AMERICAN RESOURCE CENTER	x		x		0	4	4	\$80
ASIAN YOUTH CENTER	x				0	0	0	\$0
BEST PARTNERS	x				0	745	745	\$14,900
DELHI CENTER	x				0	7	7	\$140
BETHEL BAPTIST CHURCH	x				0	0	0	\$0
BISHOP PAIUTE TRIBE	x				0	0	0	\$0
C.O.R. COMM DEVELOPMENT CORP	x				0	0	0	\$0
CAREGIVERS VOLUNTEERS ELDERLY		x			0	0	0	\$0
CHINESE CHRISTIAN HERALD CRUS.	x				0	2	2	\$40
CHINO NEIGHBORHOOD HOUSE		x			0	0	0	\$0
CITIHOUSING REAL ESTATE SERVIC		x			0	0	0	\$0
CITY IMPACT	x				0	0	0	\$0
CITY OF BEAUMONT SENIOR CENTER		x	x		0	0	0	\$0
COMMUNITY HEALTH INITIATIVE of OC (AKA: Volunteer Center of Great	x				0	0	0	\$0
CORONA NORCO FAMILY YMCA	x				0	0	0	\$0
DESERT ARC	x				0	0	0	\$0
DESERT MANNA MINISTRIES INC	x				0	0	0	\$0
DISABLED RESOURCES CTR, INC		x	x		0	5	5	\$100
EL CONCILIO DEL CONDADO DE	x		x		0	0	0	\$0
FAMILY SVC ASSOC OF REDLANDS	x				0	0	0	\$0
FOOD SHARE	x				0	0	0	\$0
GO THE CALENDAR		x			0	0	0	\$0
HELP OF OJAI, INC.	x				0	0	0	\$0
HOUSING AUTHORITY OF KINGS CO	x		x		0	0	0	\$0
KERNVILLE UNION SCHOOL DISTRIC	x				0	0	0	\$0
KINGS COMMUNITY ACTION ORG	x				0	0	0	\$0
KINGS CTY COMMISSION ON AGING	x				0	0	0	\$0
LA COUNTY HOUSING AUTHORITY		x			0	0	0	\$0
LEAGUE OF CALIF HOMEOWNERS	x				0	0	0	\$0
LTSC COMM. DEVEL. CORP	x				0	12	12	\$240
MENIFEE VALLEY CHAMBER		x			0	0	0	\$0
MEXICAN AMERICAN OPPORTUNITY		x	x		0	0	0	\$0
MTN COMM FAM RESOURCE CNTR	x				0	7	7	\$140
NEW GREATER CIR. MISSION, INC	x				0	0	0	\$0
NEW HOPE VILLAGE, INC	x				0	3	3	\$60
NEW HORIZONS CAREGIVERS GROUP		x			0	3	3	\$60
OCCC	x				0	1	1	\$20
OPERATION GRACE	x				0	0	0	\$0
OUR COMMUNITY WORKS	x				0	68	68	\$1,360
PACIFIC ISLANDER HLTH (PIHP)	x				0	0	0	\$0
PACIFIC PRIDE FOUNDATION	x				0	0	0	\$0
RIVERSIDE DEPT COMM ACTION		x	x	x	15	0	15	\$300
SALVATION ARMY SANTA FE SPGS	x				0	0	0	\$0
SALVATION ARMY VISALIA CORPS	x				0	0	0	\$0
SANTA ANITA FAMILY SERVICE	x				0	0	0	\$0
SENIOR ADVOCATES OF THE DESERT	x				0	0	0	\$0
SHARE OUR SELVES	x				0	0	0	\$0
SMILES FOR SENIORS FOUND.	x				0	0	0	\$0
SOUTHEAST CITIES SERVICE CTR.		x			0	0	0	\$0
SOUTHEAST COMMUNITY DEVELOPMEN	x				0	0	0	\$0
ST VINCENT DE PAUL		x			0	0	0	\$0
THE CAMBODIAN FAMILY	x				0	0	0	\$0
UNITED CAMBODIAN COMMUNITY INC		x			0	0	0	\$0
VICTOR VALLEY COMM SVC COUNCIL	x				0	0	0	\$0
VIETNAMESE COMMUNITY OF OC INC	x				0	0	0	\$0
VOLUNTEERS OF EAST LOS ANGELES	x		x		0	0	0	\$0
XFINITI SOLUTIONS, LLC		x			0	0	0	\$0
<b>Total Enrollments and Expenditures</b>					<b>15</b>	<b>880</b>	<b>895</b>	<b>\$17,900</b>

<sup>1</sup> All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.

<sup>2</sup> Enrollments reflect new enrollments only.

**Southern California Edison - PY 2019 CARE Annual Report**

**CARE Table 8**

**CARE Participants as of Month-End**

<b>2019</b>	<b>Gas and Electric</b>	<b>Gas Only</b>	<b>Electric Only</b>	<b>Total</b>	<b>Eligible Households</b>	<b>Penetration Rate</b>	<b>% Change</b>
<b>January</b>	0	N/A	1,203,474	1,203,474	1,337,092	90%	0%
<b>February</b>	0	N/A	1,205,310	1,205,310	1,337,092	90%	0%
<b>March</b>	0	N/A	1,204,124	1,204,124	1,337,092	90%	0%
<b>April</b>	0	N/A	1,192,387	1,192,387	1,337,092	89%	-1%
<b>May</b>	0	N/A	1,191,541	1,191,541	1,337,092	89%	0%
<b>June</b>	0	N/A	1,189,421	1,189,421	1,337,092	89%	0%
<b>July</b>	0	N/A	1,185,026	1,185,026	1,337,092	89%	0%
<b>August</b>	0	N/A	1,191,085	1,191,085	1,337,092	89%	0%
<b>September</b>	0	N/A	1,177,046	1,177,046	1,337,092	88%	-1%
<b>October</b>	0	N/A	1,189,540	1,189,540	1,337,092	89%	1%
<b>November</b>	0	N/A	1,183,050	1,183,050	1,337,092	88%	0%
<b>December</b>	0	N/A	1,185,146	1,185,146	1,337,092	89%	0%

**Southern California Edison - PY 2019 CARE Annual Report**

**CARE Table 9**

**CARE Average Monthly Usage & Bill**

<b>Average Monthly Gas / Electric Usage</b>			
<b>Residential Non-CARE vs. CARE Customers</b>			
<b>Customer</b>	<b>Gas Therms</b>	<b>Gas Therms</b>	<b>Total</b>
	<b>Tier 1</b>	<b>Tier 2</b>	
Non-CARE	66.0	5.0	71.0
CARE	13.0	1.0	14.0
<b>Customer</b>	<b>Electric KWh</b>	<b>Electric KWh</b>	<b>Total</b>
	<b>Tier 1</b>	<b>Tier 2 and Above</b>	
Non-CARE	277	238	515
CARE	331	153	484

<b>Average Monthly Gas / Electric Bill<sup>2</sup></b>		
<b>Residential Non-CARE vs. CARE Customers<sup>1</sup></b>		
(Dollars per Customer)		
<b>Customer</b>	<b>Gas</b>	<b>Electric</b>
Non-CARE	\$64.23	\$97.77
CARE	\$52.70	\$52.30

<sup>1</sup> Excludes master-meter usage.

<sup>2</sup> Average Monthly Gas/Electric Bill reflects residential Non-CARE (CARE) total billed revenues divided by the average number of Non-CARE (CARE) monthly bills.

Southern California Edison - PY 2019 CARE Annual Report					
CARE Table 10					
CARE Surcharge & Revenue					
Electric					
CARE Surcharge and Revenue Collected by Customer Class					
Customer Class	Average Monthly CARE Surcharge <sup>1</sup>	Average Monthly Bill	CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of Total CARE Surcharge Revenue Collected
Residential[1]	\$8,973,308	\$386,517,942	2.3%	\$107,679,693	28.4%
Agricultural	\$576,192	\$15,748,274	3.7%	\$6,914,302	1.8%
Commercial	\$17,687,790	\$436,890,652	4.0%	\$212,253,481	55.9%
Industrial	\$2,752,635	\$44,928,219	6.1%	\$33,031,620	8.7%
Public Authority	\$1,624,335	\$36,932,134	4.4%	\$19,492,024	5.1%
Railroads	\$30,115	\$688,297	4.4%	\$361,376	0.1%
Interdepartmental[2]	\$225	\$22,332	1.0%	\$2,704	0.0%
GAS					
CARE Surcharge and Revenue Collected by Customer Class					
Customer Class	Average Monthly CARE Surcharge <sup>2</sup>	Average Monthly Bill	CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of Total CARE Surcharge Revenue Collected
Residential	\$1,028	\$70,651	1.5%	\$12,341	37.4%
Commercial	\$1,724	\$140,594	1.2%	\$20,694	62.6%
Natural Gas Vehicle	\$0	\$0	0.0%	\$0	0.0%
Industrial	\$0	\$0	0.0%	\$0	0.0%

<sup>1</sup> 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.

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

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**CARE Table 11**

**CARE Capitation Applications<sup>1</sup>**

<b>Entity</b>	<b>Total Received</b>	<b>Approved<sup>2</sup></b>	<b>Denied</b>	<b>Pending/ Never Completed</b>	<b>Duplicate</b>
2-1-1 ORANGE COUNTY	5	2	2	0	1
APAC SERVICE CENTER	12	10	0	0	2
ASIAN AMERICAN DRUG ABUSE PROG	17	11	2	0	4
ASIAN AMERICAN RESOURCE CENTER	6	4	0	0	2
BEST PARTNERS	763	745	2	0	16
CHINESE CHRISTIAN HERALD CRUS.	3	2	0	0	1
DELHI CENTER	17	7	1	0	9
DISABLED RESOURCES CTR, INC	5	5	0	0	0
HELP OF OJAI, INC.	1	0	0	0	1
HOUSING AUTHORITY OF KINGS CO	2	0	1	0	1
KERNVILLE UNION SCHOOL DIST	0	0	0	0	0
LTSC COMM. DEVEL. CORP	15	12	0	0	3
MTN COMM FAM RESOURCE CNTR	10	7	1	0	2
NEW HOPE VILLAGE, INC	3	3	0	0	0
NEW HORIZONS CAREGIVERS GROUP	3	3	0	0	0
OCCC	1	1	0	0	0
OUR COMMUNITY WORKS	100	68	8	0	24
RIVERSIDE DEPT COMM ACTION	23	15	3	0	5
SALVATION ARMY SANTA FE SPGS	0	0	0	0	0
<b>Total</b>	<b>986</b>	<b>895</b>	<b>20</b>	<b>0</b>	<b>71</b>

<sup>1</sup> Includes sub-metered customers.

<sup>2</sup> Includes new enrollments and recertification applications approved.

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CARE Table 12						
CARE Expansion Program						
Participating Facilities by Month						
2018	Gas			Electric		
	CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
January	0	0	0	332	158	490
February	0	0	0	309	152	461
March	0	0	0	322	157	479
April	0	0	0	352	158	510
May	0	0	0	340	159	499
June	0	0	0	314	156	470
July	0	0	0	306	151	457
August	0	0	0	330	155	485
September	0	0	0	333	148	481
October	0	0	0	322	148	470
November	0	0	0	317	148	465
December	0	0	0	312	143	455

Average Monthly Gas / Electric Usage <sup>1</sup>		
Customer	Gas	Electric
	Therms	KWh
Residential Facilities	N/A	931
Commercial Facilities	N/A	12,870

CARE Expansion Self-Certification and Self-Recertification Applications					
	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	456	283	172	1	0
Percentage	62%	38%	0%	0%	0%

<sup>1</sup> Excludes master meter usage.

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**CARE Table 13**

**CARE High Usage Verification Results<sup>5</sup>**

Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring		
Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) <sup>1</sup>	Income Verified and Referred to ESA	Failed and Removed <sup>2</sup>	Ineligible <sup>3</sup>	Completed	Removed <sup>4</sup>	Appeals Denied	Appeals Approved
21,620	18,076	172	5,288	3,249	266	1,773	46	2	11

<sup>1</sup> Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.

<sup>2</sup> 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.

<sup>3</sup> 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.

<sup>4</sup> Customers removed for exceeding 600% of baseline in any monthly billing cycle.

<sup>5</sup> High usage is defined as a customer that exceeds 400% or 600% of baseline.

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**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 <sup>[1]</sup>	Percent of those CARE customers Not served by ESA Program <sup>2</sup>	# 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 [5]	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	
58,595	56%	3,325	51,585	960	1,016	1,008	999	1,023

1 Those CARE customers who have been on CARE rate 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.

5 Energy usage based on 3 months prior to ESA enrolled date

**Southern California Edison - PY 2019 CARE Annual Report**

**CARE Table 14**

<b>Categorical Enrollment</b>	
<b>Type of Enrollment</b>	<b>Number of Customer Enrollments<sup>1</sup></b>
Bureau of Indian Affairs General Assistance	526
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	51,901
CalWORKs/Temporary Assistance for Needy Families (TANF) <sup>2</sup>	-
Head Start Income Eligible - (Tribal Only)	1,410
Healthy Families A&B	27,684
Low-income Home Energy Assistance Program (LIHEAP)	6,105
Medicaid/Medi-Cal	119,005
National School Lunch Program (NSLP) - Free Lunch	44,810
Supplemental Security Income (SSI)	37,541
Tribal TANF <sup>2</sup>	11,521
VRU - State Programs	447
Women, Infants, and Children Program (WIC)	34,589

<sup>1</sup> Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.

<sup>2</sup> CalWORKs and Tribal TANF are combined categorical programs with no distinction between the two programs.

**Attachment 2**

**SCE's FERA Programs Annual Report for Program Year 2019**



An *EDISON INTERNATIONAL*® Company

**Southern California Edison Company's  
Report for the  
Family Electric Rate Assistance (FERA) Program**

**For the Period  
January — December 2019**

**May 1, 2020**

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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**

2019	FERA Enrolled	FERA Receiving Tier 3 Benefit <sup>1</sup>
January	19,236	N/A
February	19,358	N/A
March	19,439	N/A
April	19,449	N/A
May	19,567	N/A
June	19,605	N/A
July	19,660	N/A
August	19,944	N/A
September	19,809	N/A
October	19,759	N/A
November	19,891	N/A
December	20,085	N/A

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

See *Table 2*, below.

**Table 2. FERA Penetration Rate**

2019 Quarter Ending	FERA-Eligible Households	FERA-Participating Households	FERA Household Penetration Rate <sup>2</sup>
March 31	215,590	19,439	9.0%
June 30	215,590	19,605	9.1%
September 30	215,590	19,809	9.2%
December 31	215,590	20,085	9.3%

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

<sup>2</sup> FERA Household Penetration Rate is calculated by dividing FERA Participating Households by FERA-Eligible Households.

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

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 2019. This method entails annual estimation of eligibility for FERA and other income-by-household size parameters at the small-area level (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

The requirements for 2019 eligibility, corresponding to the current estimation, again used the January Health and Human Services (HHS) Poverty Guidelines<sup>3</sup> "bundling" one- and two-person households at the HHS-defined 250% FPG limit.

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 2014-2018 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.

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), to obtain 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 FERA on a monthly basis. 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, including unemployment and other forms of job separation, as well as positive changes 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 data
- Integrated Public Use Microdata Survey data
- American Community Survey data, and California Employment Development Department county, and
- Metropolitan Statistical Area level labor force series data.

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<sup>3</sup> Federal Register / Vol. 84, No. 22 / Friday, February 1, 2019 / Notices; p. 3060-3061.

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This adjustment to block group income marginal distribution is then incorporated into the otherwise "standard" estimation approach, to produce small-area estimates reflecting small-area income changes due to labor market forces.

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 level.

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% of the Federal Poverty Guidelines (FPG)), tenure, and fuel payment relationships. These cross-classifications are fitted to small-area (block group) marginal distributions 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, 2019, 68 sub-metered tenants were 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 encountered no problems administering the sub-metered FERA program during 2019.

## **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 \$37.97.<sup>4</sup>

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

The cumulative annual discount for all FERA customers was \$8,954,180.11.<sup>5</sup>

### **2.2 Administrative Cost**

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

See *Table 3*, below.

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<sup>4</sup> Includes all enrolled customers who received a discount in any month.

<sup>5</sup> Ibid.

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**Table 3. FERA Program Administrative Costs by Category and Benefits**

Category	\$ Cost
Outreach / Marketing	\$ 371,039.87
Processing, Certification, Recertification <sup>6</sup>	\$ 0.00
Post Enrollment Verification	\$ 0.00
General Administration	\$ 0.00
Information Technology	\$8,270.52
Capitation	\$ 0.00
<b>TOTAL PROGRAM COSTS</b>	<b>\$379,310.39</b>
<b>TOTAL CUSTOMER BENEFITS</b>	<b>\$ 8,954,180.11</b>
<b>TOTAL PROGRAM COSTS &amp; CUSTOMER BENEFITS</b>	<b>\$9,333,490.50</b>

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

See *Table 4*, below.

**Table 4. Administrative Cost Categories**

Category	Description
<b>Outreach</b>	<ul style="list-style-type: none"> <li>• Bill onserts</li> <li>• Advertising</li> <li>• Applications (printing and mailing)</li> <li>• Posters, brochures, and flyers</li> <li>• Postage</li> <li>• Other outreach</li> <li>• Staff labor</li> <li>• Costs related to out-bound dialing, an 800 (toll-free) #, and</li> <li>• Capitation Fee Project.</li> </ul>
<b>Processing, Certification, Recertification</b>	<ul style="list-style-type: none"> <li>• Staff labor</li> <li>• Information technology</li> <li>• Application processing</li> <li>• Training</li> <li>• Programming labor, and</li> <li>• Sub-meter certification.</li> </ul>

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<sup>6</sup> Processing, Certification, Recertification, Post Enrollment Verification, and General Administration Costs are not tracked separately from CARE; therefore, costs in these categories have been charged to the CARE Program.

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Category	Description
<b>Post Enrollment Verification</b>	<ul style="list-style-type: none"> <li>• Staff labor</li> <li>• Information technology</li> <li>• Verification processing</li> <li>• Training</li> <li>• Programming labor, and</li> <li>• Sub-meter verification.</li> </ul>
<b>General Administration</b>	<p>Information Technology / Programming:</p> <ul style="list-style-type: none"> <li>• Programming and labor costs associated with system enhancements, compliance, and maintenance of existing processes.</li> </ul> <p>Regulatory Compliance:</p> <ul style="list-style-type: none"> <li>• Applications</li> <li>• Testimony</li> <li>• Advice filings</li> <li>• Comments and reply comments</li> <li>• Hearings</li> <li>• Reports and studies</li> <li>• Working group meetings</li> <li>• Public input meetings, and</li> <li>• Tariff revisions.</li> </ul> <p>Other:</p> <ul style="list-style-type: none"> <li>• Office supplies</li> <li>• Market research</li> <li>• Program management labor (including pensions and benefits), and</li> <li>• Technical support and software licensing.</li> </ul>
<b>Startup</b>	Labor and system programming to implement the program.
<b>Benefits</b>	Rate discounts / subsidy.

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

The costs of CARE and FERA activities are separately charged to each program. Cost 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:

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- 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 Letter 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.

*Go on to the next page*

## **SCE (U-338 E) FERA PROGRAM ANNUAL REPORT – MAY 1, 2020**

### **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 decreased from 19,662 in December 31, 2017, to 19,141 in December 31, 2018, which represents a net decrease of 521 households.

FERA outreach was conducted as an adjunct to CARE outreach from April through December 2019:

- 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 outreach efforts are partnered with internal departments such as Public Affairs, Consumer Affairs, Marketing, Corporate Communications, Community Involvement, Speakers Bureau, and employee volunteer-based resource groups. These efforts also partnered with external organizations such as chambers of commerce, foundations, faith-based organizations (FBOs), and community-based organizations (CBOs) in outreach activities that target SCE's hard-to-reach customer base.
- All phone center representatives in SCE's Customer Contact Center have familiarity with the CARE and FERA programs and are equipped to answer customers' questions. They enroll eligible customers in the CARE or FERA programs via the online web enrollment application, or if requested, can send out paper applications.

#### **3.2 Discuss each of the following:**

##### **3.2.1 The CHANGES Program**

The Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program was initially approved by the Commission as a one-year pilot program.<sup>7</sup> D.15-12-047 approved the establishment of the CHANGES program as an ongoing statewide program, effective January 1, 2016.<sup>8</sup> The program provides outreach, education, and billing issue assistance to limited-English-proficient customers. The program is administered through a contract with the CPUC, using the same community contractor, Self Help for the Elderly, and 28 CBOs that also administer the CPUC's Telecommunications Education and Assistance in Multiple-Languages (TEAM) program.

Please note that CHANGES services were not provided from May 1 – June 16, 2019, due to a delay in contracting procedures. Therefore, no data for that time period is reflected below.

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<sup>7</sup> Approved November 19, 2010, Resolution CSID-004.

<sup>8</sup> D.15-12-047, p.1.

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The CHANGES CBOs during the pilot in SCE's service territory were:

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

The Resolution directed 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, and/or one-to-one technical assistance for customers on various topics, such as 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 assists in 36 languages.

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- **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.

In 2019, based on the program administrator's monthly reports, CHANGES completed activities shown in Tables 3.2.1a – d below for SCE:

**Table 3.2.1a. Activity: Disputes Resolved: By Service**

Service	Disputes Resolved
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	5
Bill Adjustment	2
Changed 3rd Party Company	0
Changed 3rd Party Electricity Aggregation	0
Consumer Education Only (must be pre-approved)	0
Energy Assistance Program Assistance	12
Enroll in Energy Assistance Programs	5
Medical Baseline Application	7
Payment Extension	28
Payment Plan	202
Request Bill Adjustment	1
Request Customer Service Visit	0
Request Meter Service or Testing	2
Schedule Energy Audit	1
Solar	24
Stop Disconnection	179
Time of Use	0
Wildfire Related Issue	0
<b>TOTAL</b>	<b>468</b>

**Note:** The total number of services may exceed the total number of cases because some cases will include more than one service provided.

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**Table 3.2.1b. Activity: Disputes Resolved: By Language**

Language	Disputes Resolved
Armenian	1
English	142
Laotian	3
Spanish	94
Tagalog	17
Vietnamese	1
<b>TOTAL</b>	<b>258</b>

**Note:** Language count may be fewer than services provided because some cases receive more than one service.

**Table 3.2.1c. Activity: Needs Assistance: By Service**

Needs Assistance Type	Disputes Resolved
Add Level Pay Plan	0
Assisted High Energy User with CARE Doc Submission	1
Assisted with CARE Re-Certification/Audit	24
Assisted with Changes to Account	23
Assisted with Reconnection	6
Billing Language Changed	2
CARE Enrollment	24
Consumer Education Only	0
Electricity Aggregation	0
Energy Alerts	0
Energy Assistance Fund (SCE)	43
Energy Assistance Fund (PG&E)	0
Energy Efficiency Tool	0
Enrolled in Demand Response Programs	0
ESAP	22
Gas Assistance Fund (SCG)	41
HEAP	358
Medical Baseline	16

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<b>Needs Assistance Type</b>	<b>Disputes Resolved</b>
Neighbor to Neighbor (SDG&E)	0
Payment Extension	56
Payment Plan	41
REACH	1
Report Scam	1
Reported Safety Problem	0
Reported Scam	0
Set Up 3rd Party Notification	0
Set Up New Account	6
Wildfire Related Issue	0
<b>TOTAL</b>	<b>665</b>

**Table 3.2.1d. Activity: Needs Assistance: By Language**

<b>Language</b>	<b>Disputes Resolved</b>
Arabic	2
Armenian	76
Cantonese	85
English	213
Eritrean	2
Farsi	1
Indonesian	1
Japanese	1
Korean	55
Mandarin	21
Spanish	185
Tagalog	1
Vietnamese	107
<b>TOTAL</b>	<b>750</b>

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### 3.2.2 Marketing

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

- Starting in January 2019, per Senate Bill 1135,<sup>9</sup> the FERA discount increased from 12% to 18%. SCE believes that the higher discount will encourage enrollment and increase participation.
- Additionally, in December 2018, the CPUC issued D.18-11-027<sup>10</sup> which, among many other directives, set an interim FERA enrollment target of 50% of eligible customers by 2023. As directed in the Decision, SCE submitted a plan on March 29, 2019 that outlined marketing strategies and tactics designed to cost-effectively grow FERA awareness and increase participation to meet the 50% enrollment target by the end of 2023.
- In February, CARE and FERA were featured in customers' monthly electric bill "onserts" — pre-printed newsletter-type communications — with articles providing resources to help reduce their electricity bills.
- Throughout 2019, SCE continued to reach out to potentially eligible non-CARE/ERA customers in an effort to enroll them in CARE or FERA. SCE sent out more than 375,000 targeted direct-mail offers, and more than 140,000 e-mails were sent to households on a monthly basis, leveraging advanced analytics based on previous responses in order to fine-tune the targeting process.
- An additional set of customers SCE targeted for enrollment in FERA were those impacted by the earthquakes that struck the Ridgecrest area over the Fourth of July holiday. Nearly 40,000 of the 375,000 customers noted above were from the Ridgecrest area.
- In 2019 as part of the 2019-2023 FERA 50 Percent Interim Target Enrollment Plan,<sup>11</sup> FERA direct acquisition efforts were being increased.
- As part of the rate-discount annual solicitation process in June 2019, SCE included CARE / FERA enrollment applications in the bills of over two million customers receiving a paper bill. Due to this effort, nearly 112 new households received the CARE rate discount.
- SCE's Customer Contact Center continues to employ the CARE / FERA enrollment application on the public website, SCE.com, either to directly enroll customers into the CARE or FERA Program by telephone, or to offer to mail a rate discount application to the customer. In 2019 more than 1,361 eligible low-income customers were enrolled through Call

<sup>9</sup> Senate Bill (SB) 1135, approved on September 14, 2018, in which the Legislature added Section 739.12 to the Public Utilities Code and increased the FERA discount to 18%, effective January 1, 2019.

<sup>10</sup> On December 7, 2018, CPUC issued D.18-11-027, *Decision on Southern California Edison Company's Proposed Rate Designs and Related Issues*.

<sup>11</sup> In compliance with Ordering Paragraph (OP) 13 of D.18-11-027.

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Center outreach efforts, including both all web enrollments and Call Center-mailed applications.

- The CARE / FERA Capitation Fee Program team is continuing its efforts to re-engage existing Capitation Agencies while strategically registering additional contractors to overcome enrollment barriers, including language, culture, and special needs, as a means of enrolling the hardest-to-reach customers. As a result of these efforts, the Capitation Fee Program continues to show increased enrollments from agencies previously inactive. In 2019, capitation contractors successfully enrolled 20 new customers in the FERA Program.

### 3.2.3 Paid Media (Advertising)

The 2019 advertising campaign promoting SCE's income-qualified programs employed digital banners (desktop and mobile), Search Engine Marketing (SEM) placements, social posts, and newspaper insertions. Digital media ads were placed through RhythmOne, a top-performing advertising network. The campaign generated over 105.7 million impressions targeting General Market (GM), Asian (Chinese, Korean, Vietnamese, Filipino/Tagalog), Hispanic, and African-American audience segments.

- **Display:** Desktop display and mobile placements targeted GM, Asian, Hispanic, and African-American segments with a household income of less than \$75,000. The desktop and mobile placements delivered over 61.6 million impressions and an overall conversion rate of 0.08%. Ethnic placements did not meet the conversion rate benchmark of 0.09% overall. Display also delivered over 45,000 clicks at a click-through-rate (CTR) of 0.07% across ESAP and Joint IQP (Rate Discount and ESA) flights.
- **Search Engine Marketing:** SEM Targeted Spanish and English-speaking customers throughout SCE's service territory and delivered 502,631 impressions, 66,899 clicks and a 13.31% CTR. We saw a 93% increase in SEM CTR performance in 2019 compared to 2018.
- **Print:** 255 insertions were placed across 36 publications targeting the Hispanic, African-American, and Asian (Chinese, Korean, Vietnamese) audience segments. The print campaign delivered over 32.8 million impressions.
- **Social:** English and Spanish-language ads were placed on Facebook and Instagram. This campaign received 10,715,340 impressions and reached 1,975,285 unique people, garnering 93,704 clicks, with a CTR of 0.87%, on a par with the 2018 social media campaign.

### 3.2.4 General Market

The advertising campaign launched July 9 and ran through December 31, 2019.

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### Digital Display Summary:

Advertising run for both ESA and Joint IQP:

- IQP placements delivered 23,143,347 impressions, with a conversion rate of 0.06% and a CTR of 0.07%.

Advertising run on both Desktop and Mobile platforms:

- Desktop placements delivered 16,598,912 impressions, with a conversion rate of 0.02% and a CTR of 0.04%, and
- Mobile placement delivered 23,215,859 impressions, with a conversion rate of 0.10% and a CTR of 0.10%.

### 3.2.5 African-American Market

The advertising campaign launched July 9 and ran through December 31, 2019. African-American media delivered a total of 8,183,293 impressions.

### Digital Display Summary:

Advertising run for both ESAP and Joint IQP that promoted ESAP and CARE:

- Joint IQP placements delivered 2,203,590 impressions, with a conversion rate of 0.08% and a CTR of 0.08%.

Advertising run on both Desktop and Mobile platforms:

- Desktop placements delivered 2,120,661 impressions, with a conversion rate of 0.02% and a CTR of 0.04%, and
- Mobile placements delivered 2,124,824 impressions, with a conversion rate of 0.11% and a CTR of 0.11%.

### 3.2.6 Asian Market

The advertising campaign launched July 9 and ran through December 31, 2019. Asian media delivered a total of 21,378,867 impressions.

### Digital Display Summary:

Digital placements for Joint IQP advertising were delivered in-language to Chinese, Vietnamese, Filipino (Tagalog) and Korean audiences across desktop and mobile devices:

- **Chinese** delivered 2,603,995 impressions, with a conversion rate of 0.07% and a CTR of 0.07%
- **Vietnamese** delivered 2,394,041 impressions, with a conversion rate of 0.07% and a CTR of 0.07%
- **Filipino (Tagalog)** delivered 2,202,059 impressions, with a conversion rate of 0.08% and a CTR of 0.07%, and

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- **Korean** delivered 2,603,156 impressions, with a conversion rate of 0.07% and a CTR of 0.08%.

Advertising run on both Desktop and Mobile platforms:

### **Chinese**

- Desktop placements delivered 1,211,190 impressions, with a conversion rate of 0.02% and a CTR of 0.04%, and
- Mobile placements delivered 1,392,805 impressions, with a conversion rate of 0.10% and a CTR of 0.11%.

### **Vietnamese**

- Desktop placements delivered 813,334 impressions, with a conversion rate of 0.02% and a CTR of 0.03%, and
- Mobile placements delivered 1,580,697 impressions, with a conversion rate of 0.10% and a CTR of 0.10%.

### **Filipino (Tagalog)**

- Desktop placements delivered 998,762 impressions, with a conversion rate of 0.02% and a CTR of 0.04%, and
- Mobile placements delivered 1,203,297 impressions, with a conversion rate of 0.12% and a CTR of 0.11%.

### **Korean**

- Desktop placements delivered 957,617 impressions, with a conversion rate of 0.02% and a CTR of 0.05%, and
- Mobile placements delivered 1,645,539 impressions, with a conversion rate of 0.10% and a CTR of 0.10%.

### **3.2.7 Hispanic Market**

The advertising campaign launched July 9 and ran through December 31, 2019.

#### **Digital Display Summary:**

Advertising run for both ESAP and Joint IQP that promoted SCE's Income Qualified Programs:

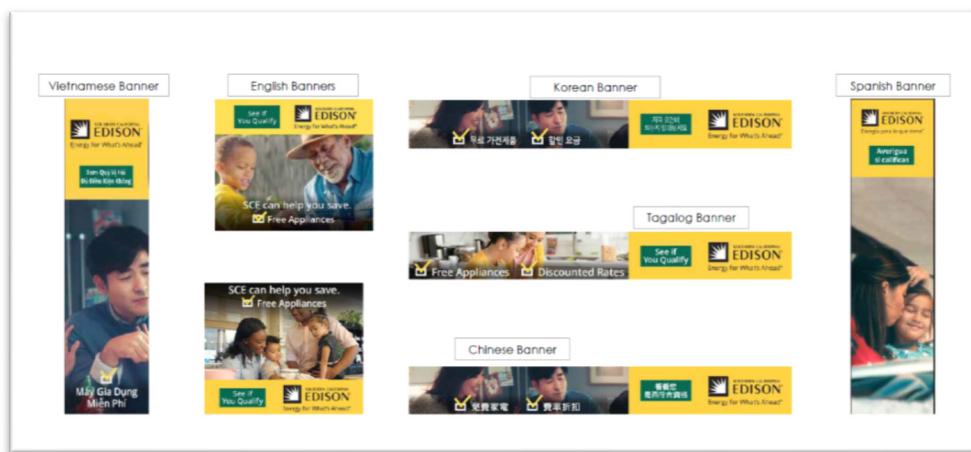
- Joint IQP placements delivered 4,611,135 impressions, with a conversion rate of 0.07% and a CTR of 0.07%.

Advertising run on both Desktop and Mobile platforms:

- Desktop placements delivered 3,572,155 impressions, with a conversion rate of 0.01% and CTR of 0.03%, and
- Mobile placements delivered 4,235,771 impressions, with a conversion rate of 0.10% and a CTR of 0.11%.

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### Illustrations: Paid Media Advertising



### 3.2.8 Social Media

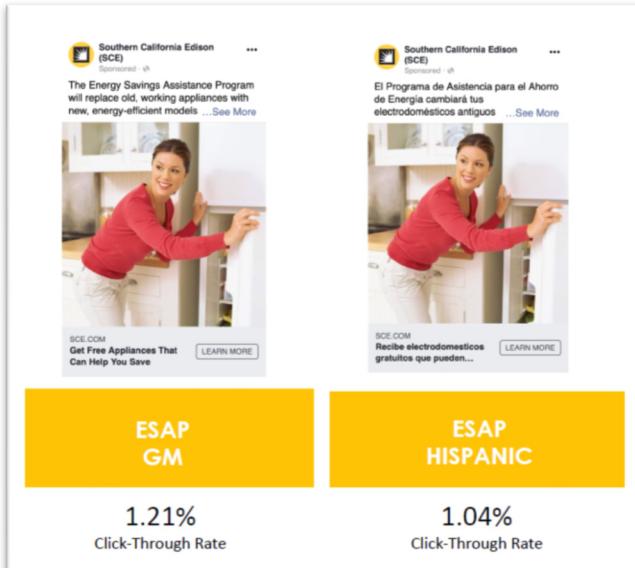
In 2019, social media was used to communicate information about income-qualified programs and promote the ESAP and CARE/FERA Programs.

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Customers were made aware of the programs through link updates in English and Spanish on Facebook and Instagram which directed customers to the respective programs' websites for more information.

- This campaign received 10,715,340 impressions and reached 1,975,285 unique people. SCE spent \$88,000 on Facebook and Instagram and ads were in flight from June through December 2019.
- The campaign garnered 93,704 clicks, with a CTR of 0.87%, on par with the 2018 social media campaign.

### Illustrations: Social Media Advertising



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### 3.2.9 Earned Media

Throughout 2019, coverage of SCE's Income Qualified Programs resulted in 13 earned media stories, five in Asian media outlets, one in Hispanic media, three in African-American, and four in general media:

In January, SCE developed an *Energized by Edison* story, "Lower Your Electric Bill, Increase Energy Efficiency" which informed readers about how they could lower their electricity bills by participating in money-saving programs at SCE, including the rate-discount programs CARE and FERA, plus ongoing savings through free replacement of working appliances such as refrigerators, air conditioners, and more:

- In addition, the story provided information on SCE's Energy Assistance Fund (EAF) which in partnership with the United Way of Greater Los Angeles provides up to \$100 to help customers pay their SCE energy bills when they meet the program's income qualifications. Assistance is available once during a 12-month period.
- The story also covered the Budget Assistant program which allows customers to set monthly spending goals and receive proactive alerts weekly, mid-month, or when they have exceeded the spending goal, and the Level Pay Plan which allows eligible customers to pay for their annual electricity service across 11 equal monthly payments.
- The story was shared by the following media outlets:
  - January 29, 2019: Antelope Valley (CA) Times (<http://theavtimes.com/2019/01/29/sce-offering-programs-to-lower-your-electric-bill/>)
  - February 11, 2019: The Fillmore Gazette (<http://www.fillmoregazette.com/front-page/lower-your-electric-bill-increase-energy-efficiency>).
  - February 13, 2019: Siam Media (<http://live.siammedia.org/index.php/news/usa-news/37971>)
  - February 15, 2019: Pakistan Link (<https://www.pakistanlink.org//Community/2019/Feb19/15/04>)
  - February 16, 2019: Asian Journal ([https://issuu.com/asianjournaldigitaledition/docs/021619\\_los\\_angeles\\_weekend\\_edition](https://issuu.com/asianjournaldigitaledition/docs/021619_los_angeles_weekend_edition)), and
  - February 20, 2019: Korea Daily (<http://www.koreadaily.com/news>).

In May, another *Energized by Edison* Story: "Programs Help Those with Lean Incomes Keep Lights On," highlighted the new 2019-2020 Income Qualified Program income levels effective June 1, per the CPUC's announcement of new 2019-2020 income-qualified guidelines for CARE, FERA, and the Energy Savings Assistance (ESA) Program.

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In the story, an SCE IQP Senior Manager was quoted that "SCE wants to make sure its eligible customers are aware of the updated income guidelines for these discount programs and encourage them to apply so they can save money on their monthly bill and meet their energy needs." The story was carried on the following media sites:

- June 12, 2019: San Bernardino American Press (<https://sb-american.com/2019/06/12/programs-help-those-with-lean-incomes-keep-lights-on/>)
- June 13, 2019: Orange County (CA) Breeze ([http://www.oc-breeze.com/2019/06/13/140225\\_programs-help-those-with-lean-incomes-save-money-keep-lights-on/](http://www.oc-breeze.com/2019/06/13/140225_programs-help-those-with-lean-incomes-save-money-keep-lights-on/))
- June 15, 2019: Chino Champion ([https://www.championnewspapers.com/community\\_news/article\\_7d76d38e-8ecb-11e9-a4a7-e3e882fd2bec.html](https://www.championnewspapers.com/community_news/article_7d76d38e-8ecb-11e9-a4a7-e3e882fd2bec.html))
- June 19, 2019: Viet Bao Daily News (<https://vietbao.com/a295486/chuong-trinh-giup-nguoicoco-loi-tuc-thap-tiep-tuc-co-dien-huong-dan-moi-ve-loi-tuc-co-the-giup-khach-hang-sce-hoi-du-dieu-kien-ti>)
- June 21, 2019: Pace News (<https://www.pacenewsonline.com/pacenewsjune212019-1-12.pdf>)
- June 22, 2019 International Daily News (<http://www.chinesetoday.com/big/article/1263671> )
- June 22, 2019: Asian Journal ([https://issuu.com/asianjournaldigitaledition/docs/062219\\_-los\\_angeles\\_weekend\\_edition](https://issuu.com/asianjournaldigitaledition/docs/062219_-los_angeles_weekend_edition))
- June 27, 2019: LA Watts Times ([https://lawattstimes.com/index.php?option=com\\_content&view=article&id=5920:new-income-guidelines-can-save-qualified-customers-money-on-their-electricity-bill-programs-help-those-with-lean-incomes-keep-the-lights-on&catid=23&Itemid=118](https://lawattstimes.com/index.php?option=com_content&view=article&id=5920:new-income-guidelines-can-save-qualified-customers-money-on-their-electricity-bill-programs-help-those-with-lean-incomes-keep-the-lights-on&catid=23&Itemid=118))
- June 27, 2019: LA Sentinel (<https://lasentinel.net/new-income-guidelines-can-save-qualified-customers-money-on-their-electricity-bill.html>)
- June 27, 2019: Vien Dong Daily News (<http://www.viendongdaily.com/sce-giup-nguoicoco-loi-tuc-thap-tiep-tuc-co-dien-POWbTnuq.html>)
- July 1, 20019: Pakistani Link (<https://www.pakistanlink.org/Community/2019/June19/21/03.HTM>)
- July 20, 2019: El Panamericano.

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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 rate discount application. All outreach efforts for FERA are also combined with the CARE Program. In 2019, SCE began a rate-comparison direct-mail campaign targeting FERA-eligible customers, comparing their annual electric bill with and without the FERA discount, and is currently evaluating the results.

SCE included additional program information for FERA in the upcoming Post-2020 Low Income Application.

#### **3.3.2 Discuss barriers to participation encountered during the reporting period and steps taken to mitigate them.**

There are several factors that have created barriers to increasing participation in the FERA program, some of which include:

- Offering CARE and FERA on one enrollment form does not allow for separate and distinct marketing of each program to the intended target audiences
- Customers may under-report income in order to receive the higher CARE 30% discount on their utility bills instead of the FERA 18% discount, and
- Customers who are categorically eligible — that is, who enroll through participation in a program which automatically qualifies them for CARE — may qualify for the FERA program without knowing it.

## **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.

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**Table 7. FERA Self-Certification and Self-Recertification Applications<sup>12</sup>**

2019	Provided <sup>13</sup>	Received	Approved	Denied <sup>14</sup>	Pending / Never Completed <sup>15</sup>	Duplicates
<b>Utility</b>	-	61,632	9,221	50,880		1,531
<b>Capitation</b>	-	20	2	18	0	0
<b>Other Third-Party</b>	-	162	16	146	0	0
<b>Total</b>	-	<b>61,814</b>	<b>9,239</b>	<b>51,044</b>	<b>0</b>	<b>1,531</b>

### 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.

**Table 8. FERA Random Post-Enrollment Verification Requests<sup>16, 17</sup>**

2019	Requested	Received	Approved	Denied	Pending / Never Completed <sup>18</sup>	Duplicates
<b>Total</b>	127	110	2	108	17	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 2019.

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<sup>12</sup> Includes sub-metered tenants.

<sup>13</sup> 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.

<sup>14</sup> Denied Self-Certification applications are counted to the CARE Program due to the dual CARE/ERA application.

<sup>15</sup> Includes cancelled recertification requests and closed accounts.

<sup>16</sup> The verification process for FERA is the same as for CARE.

<sup>17</sup> 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.

<sup>18</sup> Includes customers dropped due to non-response, cancelled requests, and closed accounts.