

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

Application of Southern California Edison
Company (U 338-E) for Approval of its
2012- 2014 California Alternate Rates for Energy
(CARE) and Energy Savings Assistance
Programs and Budgets.

And Related Matters

A.11-05-017
(Filed May 16, 2011)

A.11-05-018
A.11-05-019
A.11-05-020

**SOUTHERN CALIFORNIA EDISON COMPANY'S (U 338-E) 2015 ANNUAL REPORT
FOR 2014 LOW INCOME PROGRAMS**

JANET S. COMBS

Attorney for
SOUTHERN CALIFORNIA EDISON COMPANY

2244 Walnut Grove Avenue
Post Office Box 800
Rosemead, California 91770
Telephone: (626) 302-1524
Facsimile: (626) 302-7740
E-mail: Janet.Combs@sce.com

Dated: **May 1, 2015**

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SOUTHERN CALIFORNIA EDISON COMPANY'S (U 338-E) 2015 ANNUAL REPORT FOR 2014
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 2014. The information in this report supersedes all prior reports submitted by SCE.

Respectfully submitted,

JANET S. COMBS

/s/ Janet S. Combs

By: Janet S. Combs

Attorneys for
SOUTHERN CALIFORNIA EDISON COMPANY

2244 Walnut Grove Avenue
Post Office Box 800
Rosemead, California 91770
Telephone: (626) 302-1524
Facsimile: (626) 302-7740
E-mail: Janet.Combs@sce.com

May 1, 2015

Attachment A

SCE's ESA and CARE Programs Annual Report for Program Year 2014



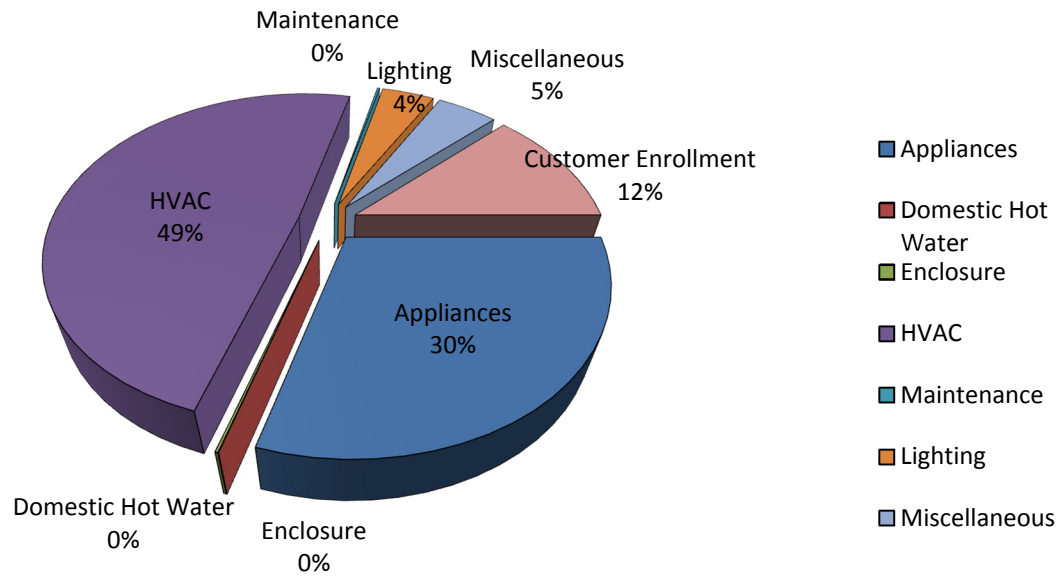
**Southern California Edison Company's
Energy Savings Assistance (ESA)
And
California Alternate Rates for Energy (CARE)
Programs Annual Report**

May 1, 2015

2014 Energy Savings Assistance Program Summary			
2014	Authorized / Planning Assumptions	Actual	%
Budget	\$72,736,630	\$55,886,233	77%
Homes Treated	87,389	76,983	88%
kWh Saved		32,187,040	
kW Demand Reduced		12,333	
Therms Saved		N/A	

2014 CARE Program Summary			
2014	Authorized Budget	Actual	%
Administrative Expenses	\$7,019,650	\$5,094,434	73%
Subsidies	\$416,800,000	\$386,148,028	93%
Service Establishment Charge	-	-	-
Total Program Costs and Discounts	\$423,819,650	\$391,242,462	92%
2014 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc.	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	52,010	160,204	87,999
2014 CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
Total Enrolled	1,499,830	1,311,210	87.4%

2014 ESA Program Expenditures by Measure Group



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1. Energy Savings Assistance Executive Summary

Provide an executive summary of the ESA program year:

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

This report provides information on SCE's ESA Program accomplishments and expenditures for 2014. In 2014 ESA program treated 76,983 homes representing 88% of its authorized budget. In addition, ESA program saved 32,187 MWh. These savings were achieved by providing a mix of measures and services, including energy education, energy efficient appliances and home weatherization.

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

1. Outreach & Assessment

SCE will send a contractor to visit the customer's home to collect information about the home and the appliances. SCE will then determine if customers are eligible for one or more measures, or services, according to the following criteria:

- All customers must provide proof of income
- Homeowners must provide proof of ownership
- The property owner's written permission must be obtained before renters can receive program services

2. Installation

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

- Complete all installations in accordance with the policies and procedures found in the California Installation Standards Manual
- Meet or exceed existing codes and regulations

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- Follow accepted building practices

3. Inspection

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

SCE's 2014 ESA Program operated in accordance with direction provided by the CPUC in Decision (D.)12-08-044 for the 2012 – 2014 funding cycle. SCE continued progress toward offering all eligible customers the opportunity to participate in ESA, and, for those who wish to participate, installing all cost-effective energy-efficiency measures in their residences by 2020.

1.1 Alignment of ESA Program with Strategic Plan Goals and Strategy

The long-term California Strategic Plan vision for the ESA program is to have 100% of all eligible and willing low income customers receive all cost effective measures Low Income Energy Efficiency measures by 2020. The Plan lays out two goals in achieving the ESA program vision: 1) By 2020, all eligible customers will be given the opportunity to participate in the ESA program, and 2) The ESA program will be an energy resource by delivering increasingly cost-effective and longer-term savings.

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

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
1.1: Strengthen ESA outreach using segmentation analysis and social marketing tools.	<ul style="list-style-type: none"> Implement energy education designed to help customers understand and change behaviors in ways that support ESA savings. 	<ul style="list-style-type: none"> Partnered and integrated with other Income Qualified Programs, joint enrollment with investor-owned utility (IOU) counterparts, leveraged organizations that service clients with disabilities, and utilized self-certification. SCE contracts with Community-Based Organizations (CBOs) with existing ties to the disabled customer segment in SCE service territory.

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Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
1.2: Develop a recognizable and trustworthy Brand/Tagline for the ESA programs.	<ul style="list-style-type: none">• Launch integrated EE/ESA/DSM brand.	<ul style="list-style-type: none">• The Statewide ME&O Branding initiative resulted in a new program name, “Energy Savings Assistance” which replaced the IOU specific names and has been in place since 2011.

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Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
1.3: Improve program delivery.	<ul style="list-style-type: none"> • Use information from segmentation analysis to achieve efficiencies in program delivery. • Leverage with Local, State, and Federal agencies as well as other organizations to increase seamless coordination, efficiency and enrollment. 	<ul style="list-style-type: none"> • Implementation of the Joint Utility Datasharing Tool, which is a tool developed by SCE and SCG to share their respective ESAP participation data • Implementation of a “blueprinting” process with SCG that will identify areas of alignment between the two utilities in order to increase cross-enrollment and to streamline the delivery of program services • Expanded the use of the Schedule Manager and Routing Tool (SMART), which provides proximity-based scheduling of jobs, mileage and time calculations, and route maps to and in-between appointments. • A new feature was introduced in EMAPS called “Appointment Reminders” which allows SCE to send installation and inspection appointment reminders to customers either through emails or through Voice Response Unit calls.

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Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
1.4: Promote the growth of a trained ESA workforce.	<ul style="list-style-type: none"> • Implement ESA workforce education and training. • Coordinate resources for training related to ESA program needs to ensure delivery of ESA-trained resources to the program. 	<ul style="list-style-type: none"> • Three types of training were offered in 2014: home assessment training, back-office training, and CBT software training. This training was offered to employees from existing service providers to improve workforce skills and increase program efficiency. • SCE also enhanced the existing workforce training content for the home assessment training course, including instruction on time management skills, communications skills, customer service skills, and safety best practices. • Engaged directly with ESA Service Providers to foster “town hall” discussions about their current and future training needs

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

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
2.1: Increase collaboration and leveraging of other low-income programs and services.	<ul style="list-style-type: none"> • Continue to expand partnerships with stakeholders and seek new opportunities for data sharing. 	<ul style="list-style-type: none"> • Coordination between CARE and ESA Programs to identify CARE customers with high energy usage for the purpose of enrolling the household in ESA • Leveraging with EAF to simplify enrollment into ESA Program • Implementation of the Joint Utility Datasharing Tool, which is a tool developed by SCE and SCG to share their respective ESAP participation data.

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Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
2.2: Coordinate and communicate between ESA, energy efficiency and DSM programs to achieve service offerings that are seamless for the customer.	<ul style="list-style-type: none"> Continually reevaluate and update programs to take advantage of new technologies. Explore in-home displays; home area networks and/or “pay-as-you-go” technology to assist low income customers manage their use. 	<ul style="list-style-type: none"> During delivery of ESA, and where appropriate, customers were provided information on SCE’s DSM/EE programs including the Summer Discount Program Increased coordination between ESA and MIDI programs through the use of contractors shared by both programs to leverage the opportunity to enroll customers in MIDI that are not income-eligible for ESA in the same visit Single Family Affordable Homes (SASH) Program: SCE coordinates with the SASH contractor, Grid Alternatives (GA), to provide leads for low income households and to ensure that all homes that sign up for SASH are either previously treated or scheduled to be treated by ESA.
2.3: Provide low income customers with measures that result in the most savings in the ESA program.	<ul style="list-style-type: none"> Assess opportunities to incorporate new energy efficiency measures into the ESA program, e.g., plug-load reduction, new HVAC technology. 	<ul style="list-style-type: none"> SCE’s program design includes measures that increase the cost effectiveness of the program (CFLs, torchieres, pool pumps, and refrigerators), reduce energy bills, improve the quality of life of customers (cooling measures), and provide long term energy savings (refrigerators and central air conditioners).
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	<ul style="list-style-type: none"> Evaluate approach determine whether additional segments are needed. 	<ul style="list-style-type: none"> The ESA Program refined the database to allow more efficient creation of ZIP Code-specific outreach and canvassing lists by the following metrics to target areas with the most eligible and willing households: ZIPs with high estimated ESA income eligibility

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Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
		<ul style="list-style-type: none">• CARE participants• Non-ESA Program participants• High energy users (CARE High Usage)

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1.2 Energy Assistance Savings Program Overview

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

Program Summary			
	Authorized / Planning Assumptions	Actual	%
Budget	\$72,736,630	\$55,886,233	77%
Homes Treated ^[1]	87,389	76,983	88%
kWh Saved	33,504,938	32,187,040	96%
kW Demand Reduced	7,539	12,333	164%
Therms Saved			

1.3 Marketing, Education, and Outreach

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

In 2014, SCE continued to employ the Energy Management Assistance Partnership System (EMAPS), which is the database used to track program participation, to identify neighborhoods with a dense low-income population and low ESA program penetration. The database tracks the marketing and outreach tactics used in the various neighborhoods to evaluate effectiveness and provide guidance to our contractors/community-based organizations (CBOs). Marketing efforts are staggered to address specific neighborhoods (small geographic areas or "ZIP7s") within SCE's service territory where city partnerships may have been established.

The ESA program continued to focus the majority of its marketing and outreach efforts on CARE customers who have not previously received ESA services. SCE's ESA program team strategically scheduled each marketing and outreach campaign to address specific neighborhoods within the service territory. Marketing efforts conform to the Whole Neighborhood Approach (WNA) by targeting customers in ZIP-7 clusters through the use of targeted direct mail postcards, automated direct connect calling campaigns, mass mailers and e-mail blast campaigns.

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

As the Paperless Enrollment process with the use of the Tablet PC technology continues to mature and gains acceptance from service providers, the effectiveness of Outreach will be maximized by allowing mobility in door-to-door canvassing. Increased mobility in canvassing allows ESA Program Representatives to respond to customer requests for enrollment more quickly, without the need to visit their respective offices. ESA Program Representatives are able to sort leads based on ZIP-7 clusters to determine the order of customers to be visited. Through Paperless Enrollment, ESA Program Representatives were able to determine customer's previous participation and eligibility while in the customer's home which eliminated wasted return visits. In 2014, forty-two (42) ESA Program Representatives (formerly referred to as Assessors) from four (4) different service providers used the paperless enrollment process to enroll 17,032 qualified customer households.

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

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

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

Another segmentation effort was initiated in late 2014, when SCE began leveraging CARE's High Usage customers who have been identified as using 400%-600% above the baseline CARE rate. The effort, which will become automated in future enhancements, identified over 15,000 customers for the 2014 year that are currently falling under these conditions. The ESA Program began referring these customers out as potential leads with the intent of enrolling these households into the program and provide energy-saving services.

Another segmentation effort in 2014 consisted of five (5) Community Forums targeting the Latino, African American, Native American, and Pacific Islander segments. These Community Forums provide a wealth of information on programs and services available to customers, businesses and non-profit organizations. This strategy builds program awareness at a grass-root and community level where many income-qualified households may connect.

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

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

Utilizing Athens Research eligibility estimates has helped improve identification of underpenetrated areas within SCE's service territory and has served as the foundation of planned marketing and outreach efforts. The Customer Marketing Tool module helps to strategically group customers specific to a targeted effort, assist in gathering customers based on the criteria of an effort (Climate Zone, County, City, ZIP Code), and ultimately track the results of an effort. SCE continued its aggressive integration and partnering efforts between the

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ESA Program and various local governments and internal and external organizations that serve within the disabled community to increase program penetration and bring benefits to a wider range of customers.

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

In 2014, SCE and SCG developed the Joint Utility Datasharing Tool (DST) for use by their service providers. The DST provides visibility of enrollments completed by each respective utility so that service providers can more effectively coordinate the delivery of services and eliminating duplicate efforts, while ensuring compliance with the Modified 3 Measure Minimum Rule.

1.4 ESA Customer Enrollment

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

Approximately 1.6 percent of the homes treated in 2014 are classified as “go backs.” These customers were identified as having received services between 1999 and 2001.

No. of Home Treated in 2014	No. of Service Accounts Treated in 2014 previously Treated in 1999-2001	Percentage of Go Back Homes
76,983	1,247	1.6%

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

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

- Households that met the income verification requirements for either CARE and/or the Energy Assistance Fund (EAF) are referred to the service providers. Since these households' incomes

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have been verified by the respective program(s), the households are not required to provide additional income documentation in order to qualify for ESA enrollment.

- Customers that can provide documentation proving one or more household members currently participate in one of several state or federal assistance programs do not need to provide additional income documentation in order to qualify for the ESA Program. The addition or deletion of programs approved for Categorical Eligibility is determined by the Commission.
- SCE leveraged the capabilities of the Schedule Manager and Routing Tool (SMART) module in its EMAPS database, and implemented automated appointment reminders for customer installations scheduled through SMART. By automating reminders in this manner, fewer cancellations and wasted visits were reported by service providers.
- With the current Paper Enrollment process, previous participation and eligibility is determined when the assessor brings enrollment paperwork back to the agency office for validation. SCE has implemented a Paperless Enrollment process with the use of the Tablet PC technology increases the effectiveness of outreach by allowing mobility in door-to-door canvassing and allows ESA Program Representatives to determine customer's previous participation and eligibility at the customer's home, which minimizes visits to ineligible homes. Furthermore, customers are enrolled in the program faster because they are not required to provide hard copies of income documents. The Paperless Enrollment software installed on the tablet PC provides immediate validation of customer data at the point of capture, and customer data is immediately transferred to SCE's customer database to determine measure eligibility. In addition, the software protects customers by removing sensitive customer information from the tablet PC upon successful transfer to SCE's customer database.
- SCE and SCG engaged in a "blueprinting" effort to examine their internal processes for the purpose of identifying areas of alignment that will generate increased efficiencies to enrollment procedures. The blueprinting effort has generated a number of efficiencies, including the implementation of a Joint Utility Datasharing Tool, which allows the IOUs to share ESAP participation data with service providers in the areas jointly served by both utilities. The sharing of participation in this manner allows service providers to more efficiently coordinate outreach efforts, while also ensuring compliance with the Modified 3 Measure Minimum Rule.

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- The SCE/SCG blueprinting effort also resulted in the implementation of a Joint Utility Property Owners Authorization form (POA). Implementation of the POA eliminates duplicate efforts and streamlines ESA enrollment for customers and property owners. This level of integration is in alignment with the Commission's directive to streamline enrollment through the creation of forms that are shared by all IOUs. In future program years, SCE and SCG plan to continue integration to include additional program forms that can be shared between the utilities.

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

The ESA Program did not meet the 2014 annual goal of homes treated because new policy direction required changes to program procedures, contractor training, and clarification from the Commission. The changes in program policy that impacted the results achieved include:

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

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1.5 Disability Enrollment Efforts

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

In 2014, SCE continued its efforts to target low-income customers with disabilities and opportunities to work with disability-related community based organizations. For example:

In collaboration with SCE's Consumer Affairs program-related brochures and pamphlets were distributed during twenty-one (21) events focused on the disabled community, including the Disability Rights California Symposium, the IEDC Disability Collaborative and the Special Olympics Summer Games.

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

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

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

Information on Enrollment of Customers with Disabilities			
Source	Total Enrollments	Disability Enrollments	% of Disability Enrollment
SCE Referral	22,596	4,339	19%
Joint Utility	35,907	5,246	15%
Outreach	22,454	4,013	18%
Total	80,957	13,598	17%
Target Enrollment Rate			15%

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

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

1.6 Leveraging Success, Including LIHEAP

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

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

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

Grid Alternatives, the external company administering the Single-family Affordable Solar Homes (SASH) program, provides SCE with a list of homes determined to be eligible for SASH treatment. SCE ensures that the homes on that list are enrolled in the ESA Program and receive all eligible and feasible measures, if they have not been previously enrolled. This ensures that the energy generated by the solar systems is not wasted by inefficient consumption.

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

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

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

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

SCE employs several contractors that also have contracts with Southern California Gas Company's ESA Program. This type of leveraging has multiple benefits, including reducing the number of contractor visits to a customer's home, as compared to being enrolled by separate contractors for each utility with additional trips and expenses required to ensure compliance with the Modified 3MM Rule.

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

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

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

SCE enhanced its database to allow contractors working in both the LIHEAP and ESA programs to enter into SCE's Energy Management Assistance Partnership System (EMAPS) data on homes treated, services installed, and whether ESA services were installed.

1.7 Integration Success

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

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

In 2014, the CARE Program identified customer households that had energy consumption in excess of 400% over their Tier 1 baseline allocation, and coordinated with the ESA Program to expedite enrollment of these households into the ESA Program in support of Senate Bill No. 1207 (SB 1207), which authorizes electrical corporations to require CARE Program participants with excessive energy usage (over 600% of baseline) to participate in the ESA Program. SB 1207 also authorizes electrical corporations to require these households, as a condition of their continue participation in CARE, to enroll in the ESA Program and reduce their energy consumption below 600% or be subject to removal from the CARE Program. Households with energy consumption exceeding 400% of

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baseline were selected so as to minimize the risk of removal from the CARE Program.

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

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

The ESA Program increased its integration efforts with the Middle Income Direct Install (MIDI) Program by employing a cross-enrollment approach involving contractors common to both programs. By employing contractors with experience in both programs, SCE was able to streamline enrollment into the MIDI Program for households that were unable to meet the income qualifications for the ESA Program without the need to schedule an additional visit.

SCE continued coordinating with other residential energy-efficiency programs such as the Energy Upgrade California Multifamily Pilot and Multifamily Energy Efficiency Rebate Program to ensure that messaging related to the ESA Program was included in each program's customer materials. Additionally, the Comprehensive Mobile Home Program (CMHP) contractor completed onsite ESA applications and assessments for potentially qualified mobile home households. Through this integrated program offering, the contractor is able to enroll households in the most appropriate program which anecdotally enhances the perceived value of both programs by potential participants.

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

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

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

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

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

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

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

The low income portion of the California Solar Initiative is divided into the Single-Family Affordable Solar Housing (SASH) and Multifamily Affordable Solar Housing (MASH) programs. SASH is managed by a company outside of SCE, and therefore coordination with SASH falls under the "leveraging" umbrella and is described in Section 1.6.1 above. SCE's MASH staff meets with multi-family housing organizations, including those who may sign up for CSI and explains opportunities that may be available for their tenants through the ESA Program. These organizations then can explain to their residents how to enroll in ESA.

1.8 Workforce Education & Training

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

During 2014, SCE continued its use of proven strategies to provide training on different aspects of the program to contractors, CBOs and vendors working in the program. SCE also engaged its Service Providers directly in order to better understand their training needs.

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The training curriculum includes workshops related to the policies and procedures for home enrollment and assessment. The curriculum includes hands-on interactive workshops to ESA service providers in the use of EMAPS, which is the web-based database used to process and track program activity. The assessment training curriculum also has been updated to include instruction on the benefits associated with SmartConnect, specifically as it relates to the implementation of new functions and features available to customers, such as Budget Assistant and Save Power Day Events. The fourth day of the four-day workshop focuses solely on Energy Education, and consists of several individual- and group activities designed to ensure that the students are knowledgeable of the material found in the resource guide. In addition, the students take part in a role-playing exercise to enhance their presentation skills.

During 2014, SCE expanded its use of web seminars (“webinars”) as a low-cost alternative to face-to-face meetings. The use of webinars reduces the overhead and travel costs typically associated with face-to-face meetings and can be scheduled almost immediately. The use of webinars was most effective when delivering training related to changes to existing policies and procedures as it allowed all Service Providers to receive the same information.

SCE continued offering free on-line software training to employees of ESA Service Providers through the CBT Learning System. Courses included Microsoft Office, Windows Navigation, etc. An additional benefit of the CBT Learning System is that it is self-contained, meaning that users are not required to have purchased any software (e.g., Microsoft Office 2007) in order to gain skills for that course. During 2014, 118 users enrolled in the system, and 3,990 different tutorials were completed.

During 2014, SCE hosted representatives of ESA Service Providers at a Training Summit, which was an all-day meeting to discuss their current and future training needs in a “town hall” setting. The Training Summit included a presentation by SCE on its training plans for the remainder of 2014, but also included breakout sessions amongst participants to share ideas on what improvements could be made. SCE plans to continue this direct engagement with ESA Service Providers in future program years.

SCE and SCG also engaged in a “blueprinting” effort to review existing internal processes related to the ESA Program for the purpose of identifying areas where processes could be aligned, and efficiencies gained. One of the aims of the blueprinting effort was to increase coordination amongst the respective training teams in order to

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streamline procedures where appropriate, to simplify the enrollment of customers into each utility's ESAP Program, and maximizing the benefits to customers in areas jointly served by SCE and SCG.

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

Many of the ESA program service providers, especially CBOs, are situated in low-income and disadvantaged communities and provide jobs within these communities. Currently, these organizations provide approximately 700 jobs that support the ESA program. This figure includes employees of service providers performing ancillary services (e.g., janitorial and clerical). SCE's training includes:

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

Type of training or recruitment conducted	Employees trained	Employees hired
Home Assessment Training	319	302
Computer Skills Training	118	

1.9 Legislative Lighting Requirements Status

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

The ESA program has not experienced any Compact Florescent Light bulb (CFL) supply issues and does not anticipate any future issues. In

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the Testimony in support of its 2015-2017 funding application, SCE proposed to phase out the installation of CFLs during the 2015 program year, and proposes to add LED A-Lamps as a new measure in 2016.

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

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

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

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

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

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

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1.10 Studies

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

Four statewide studies were authorized for the 2012-2014 ESA Program cycle. These included: (1) an impact evaluation of the 2011 ESA Program; (2) an ESA energy education study; (3) a low-income needs assessment study; and (4) a low-income multifamily segment study. All four studies were completed in 2014. Therefore, the information in Section 1.10.1 matches what was provided in last year's report. Each of these is described below.

D.12-08-044 (the decision authorizing these four studies) was adopted at the end of August 2012. Consultants for each study were selected through bid processes conducted during the last quarter of 2012. Contracts were awarded and work on each study began in first quarter 2013.

All studies were completed in 2013, in time to inform the 2015-2017 ESA Program Applications. The delay in the issuance of D.12-08-044, combined with the logistics and technical requirements required to execute each of the studies according to the objectives outlined in the Decision, posed some challenges for each of the studies given the budgets allocated and their extremely aggressive schedules. Table 1.10.2 (directly below) provides an overview of the 2012-2014 studies, and a more expansive description of each study is provided further below.

TABLE 1.10.1: 2012-2014 ESA PROGRAM STUDIES

Study	Lead Consultant	Managing Utility	Project Initiation	Public Meetings	Final Report
Multifamily Segment Study	The Cadmus Group, Inc.	PG&E	1/18/2013	3/5/2013 9/25/2013 11/13/2013	12/4/2013
ESA Energy Education Study	Hiner & Partners, Inc.	SCE	1/24/2013	3/7/2013 10/17/2013	10/31/2013
Low Income Needs Assessment Study	Evergreen Economics	SCE	2/22/2013	3/19/2013 12/3/2013	12/16/2013
ESA PY2011 Impact Evaluation	Evergreen Economics	SDG&E	1/23/2013	2/20/2013 8/7/2013	8/31/2013

Joint Utility Low Income Multifamily (MF) Segment Study

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PG&E was the contract manager for the MF Segment Study. The research contractor for this study was The Cadmus Group.

The central goal of the Multifamily Segment Study was to develop market segment profile information to investigate promising comprehensive multifamily segment strategies for the ESA Program to help develop and advance long term plans to meet the needs of low income customers living in California multifamily housing as either owners or renters.

There were six key activities in this Study designed to meet the Decision's research objectives:

1. Gather California multifamily housing data relevant for low income customer programs
2. Catalog existing multifamily energy efficiency programs relevant for low income customers
3. Review and evaluate multifamily programs and research relevant for low income customers
4. Identify and assess alternative program designs and delivery strategies
5. Identify financing and funding options
6. Solicit Public comment at key decision points

The study performed a literature review of low income MF programs to look at program design options being successfully implemented in other jurisdictions. Other data sources included a review of financing opportunities, and analyses of census and demographic data. Interviews were conducted with IOU program managers and multifamily stakeholders, and a phone survey was conducted with property owners and operators.

The study findings included the following. Statewide, 30% of all California residential households qualify for the ESA Program; low income multifamily households represent approximately 9% of total California residential households. Seven percent of these low income multifamily households live in market-rate buildings, 2% in affordable housing, and less than one percent own their unit. Changing the focus to *all* low income households, the study found that 32% of low income households reside in multifamily buildings with five or more units. The percentage of low income multifamily households varies across the four IOUs, ranging from 39% to 27%. Furthermore, when viewed across the spectrum of all California *multifamily* households, 42% qualify as low income.

This study focused on the needs and issues of multifamily property owners and operators in their role as the ultimate decision-makers

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responsible for program participation in a whole building approach. This focus was a response to the Decision's directive to explore a whole building approach.

One drawback to the study was the difficulty in getting property owners to participate in the survey. This was especially true with market rate multifamily building owners, who own the majority of California multifamily properties. These building owners, representing the majority of multifamily properties, were much harder to reach than owners and operators of affordable housing properties, who have more incentive to participate in energy efficiency upgrade programs due to federal requirements and tax incentives. This may indicate the challenges that may be expected in designing a program to reach low income tenants of all multifamily dwellings.

A public workshop to discuss the Research Plan was held on March 5, 2013 in San Francisco. Two additional workshops were held to solicit public comments on the preliminary results (September 25, 2013) and the draft report (November 13, 2013). The Final Report was issued and posted on December 4, 2013. The Joint Utilities will use the results from this study in developing the 2015-2017 ESA Program Applications.

Joint Utility ESA Energy Education Study

The prime research contractor for the energy education study was Hiner and Partners, with KEMA as a subcontractor. SCE was the contract manager.

The overall purpose of the Energy Education Study was to identify ways to optimize and/or improve the educational component of the program. Along these lines, the two primary objectives of the Energy Education Study were to find improvement opportunities concerning: (1) how energy education is provided, and (2) what materials and content are provided. The study examined both current and potential best practices across the IOUs and comparable efforts done elsewhere to inform potential improvements to this component of the program.

Overall, the study found that energy education as delivered through the ESA program's assessment process assisted participants by providing information that helped them save money on their energy bills and addressed some of the barriers to reducing energy consumption in their homes.

In terms of overall delivery of the education component, the study found that the interactive customer specific delivery process is

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effective and follows best practices. In addition, assessor recruitment, selection, training, and retention processes were reported to be largely effective; though varied across the IOUs.

‘Best practices’ that may be adopted across the joint utilities were offered. In addition, the study found that the benefits of the education component are such that it may be prudent to support the provision of education at the time of the assessment even if the home does not qualify for other measures.

Regarding educational content, the study found that the materials were relatively comprehensive, but offered some suggestions for modifications and improvements. Most notably, the study found that customers reported seeking more information on specific and practical appliance cost of use information.

The final study results were presented at a public workshop on October 17, 2013. The final report was issued and posted on October 31, 2013.

Joint Utility Low Income Needs Assessment Study

The Low Income Needs Assessment (LINA) Study was a statewide study managed by SCE. Evergreen Economics was the research contractor.

The previous low income needs assessment study was completed over five years ago and was based on data collected nearly 10 years ago. The overall study objective for the 2013 study was to provide information on the needs of the low-income customers eligible for ESA and CARE. In particular, the study was expected to report estimates of eligible households; inform updates of remaining energy savings potential; assess customer perceptions and accessibility of the programs along with willingness and barriers to participate; evaluate energy burden and insecurity; and identify energy-related needs and non-energy benefits.

The study’s key findings included the following:

- Roughly 32% of California IOU households are eligible for CARE and ESA. Of these, 95% were enrolled in CARE as of the end of 2012, and 59% of eligible households have been treated by ESA.
- Both the CARE and ESA programs have been effective in serving households including those that speak non-English languages, single-parent households, and households with seniors. The programs have been less successful reaching areas with more renters, extreme poverty

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and higher energy usage.

- Key barriers to ESA participation include lack of customer trust of contractors; difficulty getting the landlord's approval for renting customers; customers having to be home for appointments; and homes needing measures the program offers. The requirement to provide income documents was not found to be a barrier.
- Roughly 52% of non-participants are willing to participate in ESA. This is significantly less than the estimate reported by the previous Needs Assessment (95%).
- The mean energy burden is estimated at 8%. This is statistically unchanged from 2005 data collected for the prior Needs Assessment study.
- Single-family renters have greater energy-related needs and barriers to participation than single-family homeowners and multi-family dwellers.
- The average CARE customer saves \$29 per month (33% savings) on their electric bill and \$6 per month (18% savings) on their gas bill.
- 81% of ESA participants reported noticing a reduction in their energy bills and between 44 to 64% reported noticing improvements in health, comfort and safety.
- Customers reported that HVAC and weatherization measures are more likely to generate savings and improvements in health, comfort and safety. The next most beneficial measure reported was a refrigerator.

The final study results were presented at a public workshop on December 3, 2013. The final report was issued in three volumes and posted on December 16, 2013.

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Joint Utility 2011 ESA Program Impact Evaluation

The Impact Evaluation was a statewide study managed by SDG&E. The prime research contractor for the 2011 ESA Program Impact evaluation was Evergreen Economics.

The primary objective of this evaluation was to estimate first-year electric and gas savings and coincident peak demand reduction attributable to the 2011 ESA program. The results are used to quantify the 2011 program achievements, document the relative value of various measures in producing energy savings, produce savings forecasts, and meet filing and reporting requirements (including informing the development of the 2015-2017 ESA program application).

The methodology used in the study was a fixed effects billing regression model. Savings estimates were developed at the measure and household level. The study also conducted a customer phone survey of 602 participants whose billing data indicated increased usage in the period directly after program intervention. In an effort to find the best fit, various model specifications were used in the analysis. The final measure-level estimate values were chosen based on whether or not the ex-ante value fell within the resulting 95 percent confidence interval of the impact estimate; if not, evaluator judgment was used to assign a value from either an alternate model or the ex-ante value.

The impact study found that savings from the ESA Program measures was a small fraction of overall household energy consumption and that a significant number of ESA participant households were actually using more energy after their participation in the ESA Program. Evergreen Economics posited that customers may be unaware that they were using more energy.

The final impact estimates were generally consistent with the ex ante savings values, although there is some deviation from the previous evaluation and from DEER values. Some natural variation across years was expected due to a variety of factors, including weather, measure mix and participant demographics.

The final study results were presented at a public workshop on August 7, 2013. The final report was issued in two volumes and posted on August 30, 2013.

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- 1.10.2 *If applicable, submit Final Study Report describing: 1) Overview of study; 2) Budget spent vs. authorized budget; 3) Final results of study; and 4) Recommendations.*

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

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

Study	Lead Consultant	Managing Utility	Budget Authorized ¹	Budget Expensed	%
Multifamily Segment Study	The Cadmus Group, Inc.	PG&E	\$400,000	\$399,340	100%
ESA Energy Education Study	Hiner & Partners, Inc.	SCE	\$300,000	\$217,195 ²	72%
Low Income Needs Assessment Study	Evergreen Economics	SCE	\$700,000	\$699,997	100%
ESA PY2011 Impact Evaluation	Evergreen Economics	SDG&E	\$600,000	\$489,364	82%

1.11 Pilots

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

SCE did not conduct any pilots in 2014

¹ This amount represents the total authorized Joint Utility study budget. The authorized Joint Utility budget split is: PG&E--30%, SCE--30%, SCG--25%, and SDG&E--15%.

² The expensed amount reported does not include the final invoice which is expected to bring the total to the contracted amount of \$250,764 for the Energy Education Study.

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- 1.11.2 *If applicable, submit Final Pilot Report describing: 1) Overview of pilot; 2) Description of Pilot Evaluation Plan (PEP); 3) Budget spent vs. authorized budget; 4) Final results of pilot (including effectiveness of the program, increased customer enrollments or enhanced program energy savings); and 5) Recommendations.*

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

1.12 “Add Back” Measures

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

SCE has provided the required reporting on “Add Back” measures in ESA Table 16. These measures were “added back” by the Commission in Ordering Paragraphs 41 (Envelope & Air Sealing), 45 (Central AC), 46 (Room AC), 48 (Heat Pumps), and 52 (Central AC Service) in D.12-08-044.

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

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

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2. CARE Executive Summary

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

This report provides information on SCE's CARE program accomplishments and expenditures for 2014. At year-end of 2014 1,311,210 customers were on the CARE rate, resulting in a penetration rate of over 87%. SCE continues to work towards meeting the Commission's directed CARE Program goals and objectives.

2.1 Participant Information

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

TABLE 1		
Residential CARE Program Customers by Month1 (electric usage)		
2014	CARE Customers	Percentage Change
January	1,324,151	-
February	1,331,639	1%
March	1,321,633	-1%
April	1,314,890	-1%
May	1,312,506	0%
June	1,319,075	1%
July	1,321,221	0%
August	1,322,556	0%
September	1,333,416	1%
October	1,329,323	0%
November	1,321,462	-1%
December	1,311,210	-1%

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

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

SCE and the other California IOUs used the joint utility methodology adopted by the CPUC in D.01-03-028 to develop quarterly and monthly penetration estimates for use in 2014. This method entails annual estimation of eligibility for CARE, ESA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

Sources for the estimation include the CPUC's current guidelines, current year small area vendor marginal distributions on household characteristics, Census Public Use Microdata Survey (PUMS) 2000 and PUMS 2007-2011 sample data, utility meter and master meter household counts, Department of Finance CPI series, and various GIS sources. An important change has been implemented since 2011, which involves adjusting small area (block group) income distributions to match the latest American Community Survey (ACS) distributions at the Public Use Microdata Area.

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

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

In 2009, the method was augmented to better incorporate the impact of labor force changes (unemployment and other forms of job separation, as well as positive changes that are expected to occur in California subsequent to the recession).

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The method adjusted block group marginal distributions on household income based on sub-state modeling that incorporated Current Population Survey, Integrated PUMS data, ACS Data, and California Employment Development Department county and MSA level labor force series. This adjustment to block group income marginal is then incorporated into the otherwise “standard” estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

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

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

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

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

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

See SCE’s response above to Question 2.1.2.1. Note that the methodology is based on estimating small area (block group) level household (size-by-income-by-household-age) tabulations for the current year, and connecting these

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estimates with small area counts of households that are individually metered or submetered. Block group/utility-specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area: ZIP+2, ZIP, tract, county, territory, etc. Statewide estimates, regardless of utility boundaries, are also provided at small and large area levels.

2.1.2.4 Describe how current CARE customers were counted.

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

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

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

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

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

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

The estimate of current CARE-eligible submetered tenants of master-meter customers by energy source at year-end is 73,259.

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

The current CARE submetered tenant count by energy source at year-end is 35,041.

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

The current CARE submetered penetration rates by energy source at year-end is 48 percent.

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

SCE continues to directly contact submetered tenants to expedite the recertification of CARE and FERA. This approach has proven to be more effective than the previous tactic of solely approaching the mobile home park owners/managers in increasing tenant enrollments/recertification.

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

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2.2 CARE Program Summary

2.2.1 Please provide CARE program summary costs.

CARE Budget Categories	Authorized Budget	Total Expenditures	% of Budget Spent
Outreach (Includes Automatic Enrollment)	\$2,613,000	\$1,888,933	72.3%
Processing, Certification, Recertification	\$588,000	\$813,717	138.4%
Post Enrollment Verification	\$1,423,650	\$462,401	32.5%
Information Tech./Programming	\$1000,000	\$1,001,320	100.1%
Pilots ^[3]	\$216,000	\$218,225	101%
Measurement and Evaluation	\$50,000	\$0	0.0%
Regulatory Compliance	\$264,000	\$292,251	110.7%
General Administration	\$725,000	\$373,016	51.5%
CPUC Energy Division Staff	\$140,000	\$44,571	31.8%
Cooling Centers ^[1]	N/A	N/A	N/A
Total Expenses	\$7,019,650	\$5,094,434	72.6%
Subsidies and Benefits ^[2] ^[3]	\$416,800,000	\$386,148,028	92.6%
Total Program Costs and Discounts	\$423,819,650	\$391,242,462	92.3%

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

^[2] Subsidies and benefits include rate discounts.

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

2.2.2 Please provide the CARE program penetration rate to date.

CARE Penetration			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
1,311,210	1,499,830	87.4%	No

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

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SCE received six (6) recertification complaints in 2014. The complaints and resolutions are as follows:

Month	Number of Complaints Received	Nature of Complaint	How was Case Resolved
January	1	A customer did not return the CARE recertification paperwork and as a result lost the discount. The CPUC referred him to SCE's Consumer Affairs Department, which explained that the customer must complete the recertification paperwork to be reinstated on the rate. SCE sent a second package to the customer with instructions to return the paperwork to Consumer Affairs for tracking.	The customer will not be retro-billed and stated he understands why.
February	0		
March	0		
April	1	The customer called when they received the recertification paperwork and was twice erroneously told over the phone that the process was complete. Customer finally sent paperwork on 3/26, but was not retroactively rebilled and called the CPUC.	Due to the misinformation from SCE, the account was rebilled to make CARE discount retroactive. Customer received full credit.
May	0		
June	0		
July	0		
August	0		
September	2	Customer wrote to the Better Business Bureau several times stating she was not receiving CARE as promised. Customer did not respond to messages/email.	To date the customer has not contacted SCE and has not submitted recertification documentation. The

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		<p>Recertification request was sent in September.</p> <p>Customer did not respond to recertification request and was removed from CARE. Customer was advised by Contact Center to submit paperwork and their account may be rebilled, with no guarantee given. Customer's retroactive rebill was denied and contacted CPUC.</p>	<p>CPUC file remains open. If SCE receives no customer response, a letter will be mailed to the Customer advising them of what is needed to recertify and be placed back on the CARE rate.</p>
October	0		
November	1	<p>Customer was removed from CARE rate because recertification documents were not submitted. SCE Consumer Affairs received a complaint through the Better Business Bureau stating the customer called SCE to dispute a high bill, and they were advised of the recertification process. Customer states they never received any recertification requests. As a follow-up, Customer sent a written complaint to the CPUC about the removal of the CARE discount, stating that the recertification request was never received. On both complaints SCE called the Customer, leaving messages requesting a return call.</p>	<p>To date, the customer has not contacted SCE, and has not submitted recertification documentation.</p> <p>The CPUC file remains open. If SCE receives no customer response, a letter will be mailed to the Customer advising them of what is needed to recertify and be placed back on the CARE rate.</p>
December	1	<p>Complaint received from the tenant of a mobile home park who lost his CARE discount in May when SCE received no response to a CARE recertification request.</p>	<p>The mobile home park has since changed owners and SCE Consumer Affairs confirmed only that the customer was reinstated on CARE on 12/3/14.</p>

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2.3 CARE Program Costs

2.3.1 *Discount Cost*

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

The average monthly discount per CARE customer was \$24.24

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

The annual subsidy (discount) for all CARE residential program customers was \$386,148,028

2.3.2 *Administrative Cost*

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

See Section 2.2.1.

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

The requested information is provided in the table below:

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

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

In D.02-09-021, the CPUC required SCE to establish the CARE balancing account (CBA), effective January 1, 2002. The balance in the CBA as of December 31, 2014 was \$20.45 million.

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

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

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the CARE Program to SCE's Public Purpose Programs rate component. D.02-09-021³ required SCE to establish a CARE balancing account (CBA) to record the following on a monthly basis: (1) the difference between CARE discounts provided to CARE-eligible customers and CARE surcharges billed to non-CARE customers, (2) the difference between the authorized CARE and Family Electric Rate Assistance (FERA) administration amounts and actual incurred CARE and FERA administration expenses, (3) costs associated with the CARE automatic enrollment program, and (4) costs associated with the Energy Division's audit of SCE's CARE program.

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

CARE Surcharge and Revenue Collected by Customer Class (2014)					
Customer Class	Average Monthly CARE Surcharge	Average Monthly Bill	CARE Surcharge as Percent of Bill	Total Annual CARE Surcharge Revenue Collected	Percentage of Total Annual CARE Surcharge Revenue Collected
Residential ¹	\$9,155,195	\$410,620,782	2.2%	\$109,862,345	27.5%
Agricultural	\$824,393	\$22,585,333	3.7%	\$9,892,718	2.5%
Commercial	\$17,840,052	\$488,264,469	3.7%	\$214,080,625	53.6%
Industrial	\$3,564,398	\$65,392,699	5.5%	\$42,772,770	10.7%
Public Authority	\$1,864,893	\$48,562,037	3.8%	\$22,378,718	5.6%
Railroads	\$35,301	\$1,048,400	3.4%	\$423,615	0.1%
Interdepartmental ²	\$0	\$14,046	0.0%	\$0	0.0%
Totals	\$33,284,233	\$1,036,487,766	3.2%	\$399,410,791	100.0%

¹ Excludes CARE customers

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

³ D.06-12-038 and Advice 2079-E authorized SCE to eliminate the entry associated with recording CARE balancing account (CBA)-related retail revenue and include an entry to allow for the transfer of the year-end balance recorded in the CBA to the Public Purpose Programs Adjustment Mechanism (PPPAM).

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2.4 Outreach

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

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

SCE's goal is to enroll as many eligible customers as are willing to participate in CARE. CARE enrollment decreased from 1,335,607 on December 31, 2013, to 1,311,210 on December 31, 2014, which represents a net decrease of 24,397.

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

Date	Location
February 27, 2014	Highland
March 30, 2014	Santa Barbara
July 12, 2014	Moreno Valley
September 19, 2014	Garden Grove
October 17, 2014	Long Beach

In 2014, SCE participated in more than 150 community events targeting customers seeking information on bill payment and assistance through rate assistance and energy savings. At events including, but not limited to, the Black History Month celebrations, World Ag Expo, senior and faith-based community events, Southern California Edison Lamp Exchanges, Earth Day festivals, Winter

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festivals, and the Los Angeles County Fair, more than 20,000 customers received information on CARE/FERA and Energy Savings Assistance Program as ways to help lower their energy usage and ultimately their electric bill.

CHANGES

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

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

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

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

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Based on the program administrator's monthly reports, CHANGES completed the following activities for SCE (January-December 2014):

Component (in language)	Activity
Community Events:	
Chinese English Ilokano Japanese Korean Spanish Tagalog Vietnamese	CBOs did outreach and distributed materials at 33 local community events serving 13,840 customers.
Media:	
<u>Television</u> <u>Dari</u>	Zarin TV (No. reached: 1000,000)
<u>Radio</u> Chinese	Heavenly Rainbow AM1430 (No. Reached: 300,000)
Vietnamese	Bolsa Radio (No. Reached: 50,000)
<u>Print</u> ⁴ Spanish (No. Reached: 467,000) Chinese (No. Reached: 150,000) Korean (No. Reached: 99,000) English (No. Reached: 96,500) Tagalog (No. Reached: 50,000)	Asian Journal Chinese Christian Herald Crusades El Clasificado Korea Daily Korea Times LA Midweek Asian Journal RafuShimpo Tribune U.S.A. The U.S. Asian Report Viet American Weekly

⁴ This information was retrieved from the monthly data report that the CHANGES program administrator, Self Help for the Elderly (SHE) submits to SCE. While compiling data for the CARE Annual Report, SCE noticed discrepancies in SHE's month report where April YTD total media reach was 195,000, but in May, despite showing zero media outreach that month, the YTD total media reach increased to 195,550. A second discrepancy was found in November SHE monthly data report where media outreach reflected Korea Daily print placement with a reach of 150,000. In December SHE corrected the Korea Daily reach from 150,000 to 70,000 and added a second print placement for Korea Times. However, the YTD total in December was not updated to reflect that correction. SCE is reporting above the corrected total with Korea Daily reach of 70,000 instead of 150,000.

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Japanese (No. Reached: 25,000) Vietnamese (No. Reached: 10,000)	Weekend Balita
Consumer Education: By Topic⁵	
Arabic Armenian Bengali Cantonese English Farsi Ilokano Indonesian Japanese Khmer Korean Lao Mandarin Persian Romanian Spanish Tagalog Thai Vietnamese Visayan	CBOs provided small workshops (workshop topics include: Understanding Your Bill, Safety Tips, Level Pay Plan, Energy Conservation, CARE/FERA and Other Assistance Programs, Avoiding Disconnection, and High Energy Use) and one-to-one education with 6,546 customers.

Marketing

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

- Income qualified programs and other assistance programs (CARE, FERA, ESA, Level Pay Plan and Medical Baseline) were featured in all customers' monthly electric bill 'onserts' – pre-printed newsletter-type communications – with articles providing resources to help reduce their electricity bills.

⁵ The monthly total of customers educated reported by SHE does not coincide with SHE monthly data report for December 2014 YTD totals. CARE table 11 data from CARE program monthly rapid deployment reports indicate a total of 6,546 customers educated by topic and customer one on one sessions. SHE monthly data report for December YTD total customers educated was 6,281. SCE is reporting above the corrected total of 6,546.

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- In Q. 2, 2014 SCE reached out to customers who had not responded to previous CARE recertification requests, and were subsequently removed from the rate. A direct-to-customer letter was sent to approximately 39,000 customers inviting them to re-enroll in CARE. Approximately 3,700 re-enrollments were received.
- As part of the CARE annual solicitation process in June 2014, SCE included CARE enrollment applications in the bills of nearly 3 million customers receiving a paper bill (not receiving bills on-line). Because of this effort, nearly 14,000 new households began receiving the CARE rate discount.
- To continue to ensure that customers have every opportunity to learn about and participate in CARE, SCE's Home Energy Efficiency Survey / Home Energy Advisor energy usage report includes information about the CARE program.
- SCE's Customer Communications Organization within SCE's Call Centers continues to utilize the on-line CARE enrollment application at www.sce.com to directly enroll customers into the CARE program over the phone or offer the option to send a CARE application to the customer. In 2014, 116,988 eligible low-income customers were enrolled through Call Center outreach efforts. (This includes all web enrollments and Call Center-mailed applications.)
- CARE enrollment is coordinated with other low-income programs such as ESA, LIHEAP, SoCalGas income qualified programs and certain water utilities. Each month, ESA participants are automatically enrolled in CARE and LIHEAP participants are automatically enrolled in CARE quarterly. In 2014, 47,262 eligible customers were enrolled in CARE through the data sharing with LIHEAP, ESA, SoCalGas, water utilities and SCE's EAF Program. The CARE Program continuously integrates its efforts and messaging with the ESA program at all outreach events, communications, and marketing campaigns.
- SCE enrolls new CARE customers through the Energy Assistance Fund (EAF), a program that provides utility payment assistance through voluntary customer, employee, and SCE shareholder donations. The EAF income requirements are the same as CARE's. In 2014, more than 1,300 EAF recipients were enrolled in the CARE program.

Social Media

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- Social media for Income Qualified Programs in Q4 via Facebook to increase awareness and participation in CARE/FERA and ESA, targeting customers ages 18-65 with a HHI<\$75K.
- Delivered ads on mobile devices in line with behavioral trends among low-income and ethnically diverse customers.
- Developed a Tumblr post with program information, driving audience to sce.com for more information.
- In total, there were:
 - More than 2.8 million impressions
 - Nearly 24,000 website clicks
 - 275 Page Likes
 - 1,851,000 Social Impressions
 - 2,230 Post “Likes”
 - 170 “Comments”

Paid Media (Advertising)

The CARE/ESAP/FERA advertising campaign consisted of desktop display, mobile display and SEM media. The SEM campaign reached all customers throughout the SCE service territory. SEM delivered 676,461 impressions, 5,710 clicks and a 0.84% click-through rate (CTR). Desktop display and mobile placements were targeted to African-American, Asian, Hispanic and Native American ethnic segments. The desktop display and mobile display campaigns delivered a total of 12 million impressions and 38,000 clicks.

African-American

Advertising was delivered to the African American community October through December 2014 with targeted on-line media placements. African American media delivered a total of 1,613,622 impressions and generated a CTR of 0.31%.

On-line

On-line advertising was placed through Maxpoint, a top performing ad-network used on SCE campaigns. Desktop display delivered 1,027,154 impressions and a CTR of 0.20%. Mobile placements delivered 586,468 impressions and a CTR of 0.50%. 4,218 visits to the site can be attributed to the on-line advertising campaign.

A brief summary of total audience reach is as follows:

Total On-line Impressions 1,613,622

Native-American

Advertising was delivered to the Native American community October through December 2014 with targeted on-line media placements. Native

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American media delivered a total of 164,294 impressions and generated a CTR of 0.35%

On-line

On-line advertising was placed through Maxpoint, a top performing ad-network used on SCE campaigns. Desktop display delivered 104,595 impressions and a CTR of 0.23%. Mobile placements delivered 59,699 impressions and a CTR of 0.55%. 485 visits to the site can be attributed to the on-line advertising campaign.

A brief summary of total audience reach is as follows:

Total On-line Impressions 164,294

Asian

The Advertising campaign ran October through December 2014 and included targeted digital and print media. Asian media delivered a total of 3,047,701 impressions. Digital placements were delivered in-language to Cambodian, Chinese, Filipino, Korean and Vietnamese audiences. A mix of Chinese, Korean, Vietnamese and Filipino publications was used.

Print

Information about SCE's CARE/ESAP/FERA programs was conveyed in different Asian market publications including World Journal, Sing Tao, Korea Times, Korea Daily, Nguoi Viet, Viet Bao, Weekend Balita, Asian Journal and California Journal.

- Total Insertions: 32
- Total Impressions: 1,748,914

On-line

On-line advertising was placed through Maxpoint, a top performing ad-network used on SCE campaigns. Desktop display delivered 826,384 impressions and a CTR of 0.20%. Mobile placements delivered 472,403 impressions and a CTR of 0.54%. 3,623 visits to the site can be attributed to the on-line advertising campaign.

- Total Impressions: 1,298,787
- Total Clicks: 4,262

A brief summary of total audience reach is as follows:

Total Print Impressions 1,748,914

Total On-line 1,298,787

Total Audience Reach 3,047,701

Hispanic

Advertising was delivered to the Hispanic community October through December 2014 with targeted on-line media placements. Hispanic media delivered a total of 9,191,411 impressions and generated a CTR of 0.31%

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On-line

On-line advertising was placed through Maxpoint, a top performing ad-network used on SCE campaigns. Desktop display delivered 5,848,281 impressions and a CTR of 0.20%. Mobile placements delivered 3,343,130 impressions and a CTR of 0.52%. 24,446 visits to the site can be attributed to the on-line advertising campaign.

A brief summary of total audience reach is as follows:

Total On-line Impressions \$164,294

Earned Media (PR and Outreach)

In 2014, SCE issued a news release (“New Income Limits May Help More SCE Customers Qualify for Utility Bill Discounts”) and an on-line newsroom story (“CARE and FERA Programs Help Qualified Customers in Need”) as part of its earned media activities.

Summary of earned media:

Market	Audience Reach
African American	384,175
Asian	8,788,741
Hispanic	817,540
Total Earned Media Audience Reach	9,990,456

African-American

In 2014, 15 earned media placements were generated about CARE and FERA within the African-American community, which generated a total of 384,175 print, on-line and social media impressions.

Print

Information about SCE’s money saving programs were published in a number of publications resulting in seven print media placements: California Crusader News (2 placements, Metro), Tri-County Sentry (Northern), San Bernardino American News (Eastern), Inland Valley News (Southern), Long Beach Times (Metro) and Westside Story Newspaper (Eastern).

Total Earned Placements:	7
Total Circulations:	104,000
Total Print Impressions:	364,000

On-line

Five media placements were highlighted on tricountysentry.com, calcrusnews.com, ourweekly.com and westsidestorynewspaper.com.

Total Earned Placements:	5
Total On-line Impressions:	17,000

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Social media

Reaching more than 3,000 friends, the Carson Southbay News and Westside Story shared the information on Facebook, while the Tri-County Sentry shared it on Twitter.

Total Earned Placements: 3
Total On-line Impressions: 3,175

A brief summary of total audience reach is as follows:

Total Print Impressions 364,000
Total On-line 17,000
Total Social Media 3,175
Total Audience Reach 384,175

Media Placements – African-American Media

Media Outlet	Media Type	Publication/Air Date	Impressions
Carson Southbay News Facebook	Social Media	6/3/2014	2,556
calcrusnews.com	On-line	6/5/2014	1,500
California Crusader	Print	6/5/2014	84,000
San Bernardino American News	Print	6/12/2014	35,000
Tri County Sentry	Print	6/12/2014	35,000
Tri County Sentry Twitter	Social Media	6/12/2014	39
tricontysentry.com	On-line	6/12/2014	1,500
calcrusnews.com	On-line	6/19/2014	1,500
California Crusader	Print	6/19/2014	84,000
Inland Valley News	Print	7/3/2014	64,750
WestSide Story Facebook	Social Media	7/3/2014	580
Westside Story Newspaper	Print	7/3/2014	26,250
westsidestorynewspaper.com	On-line	7/3/2014	1,500
ourweekly.com	On-line	7/17/2014	11,000
Long Beach Times	Print	7/31/2014	35,000
TOTAL			384,175

***California Crusader News ran the article twice.**

Asian

In 2014, 37 earned media placements covering CARE/FERA, Energy Savings Assistance (ESA), and Energy Assistance Fund (EAF) programs within the Asian community totaled 8,788,741 impressions.

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The “New Income Limits May Help More SCE Customers Qualify for Utility Bill Discounts” press release garnered media coverage on the topic of CARE/FERA during the months of June and July of 2014. These stories based on the press release were covered in Chinese, Filipino, Korean, Thai and Vietnamese media. Other media-initiated stories not based on the press release but which included general information or mentions about Energy Savings Assistance (ESA), Energy Assistance Fund (EAF), or CARE/FERA for low-income customers were published by the following outlets: Korea Times, World Journal, and Sing Tao Daily.

Print

Information about SCE’s CARE/FERA, ESA, and/or EAF programs were conveyed in different Asian market publications including Korea Herald Biz, International Daily News, World Journal, US Asian Post, Viet Bao Daily News, Philippine Tribune, Siam Media, Chinese Biz News, Saigon Times, Korea Times, and Sing Tao Daily.

- Total Earned Placements: 13
- Total Impressions: 2,147,600

Television

LA 18 Korean, New Tang Dynasty, CTI-TV, and TVB-USA discussed the CARE/FERA programs on-air. TVB-USA interviewed a spokesperson on the CARE/FERA programs.

- Total Earned Placements: 5
- Total Impressions: 1,832,900

On-line

On-line sites, print publications and TV outlets, including but not limited to, Korea Daily, Asian Journal, and chineseinla.com, also posted stories on-line.

- Total Earned Placements: 18
- Total Impressions: 4,807,445

Social Media

One broadcast station, LA 18 Korean, shared their coverage with their subscribers on YouTube.

- Total Earned Placements: 1
- Total Impressions: 796

A brief summary of total audience reach is as follows:

Total Print Impressions	2,147,600
Total Broadcast	1,832,900
Total On-line	4,807,445
Social Media	796

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Total Audience Reach

8,788,741

Media Placements – Asian Media

Media Outlet	Media Type	Market	Publication / Air Date	Impressions
Sing Tao Daily	Print	Chinese	6/1/14	105,000
Asian Journal	On-line	Filipino	6/2/14	28,910
Korea Herald Biz	On-line	Korean	6/2/14	6,500
LA 18 Korean	TV	Korean	6/2/14	250,000
LA 18 Korean	Social Media/ Youtube	Korean	6/2/14	796
New Tang Dynasty TV	TV	Chinese	6/2/14	500,000
ChannelGE.com	On-line	Chinese	6/3/14	2,100
ChineseinLA.com	On-line	Chinese	6/3/14	13,041
International Daily News	Print	Chinese	6/3/14	84,000
International Daily News	On-line	Chinese	6/3/14	18,877
Korean Herald Biz	Print	Korean	6/3/14	140,000
New Tang Dynasty TV	On-line	Chinese	6/3/14	270,597
World Journal	On-line	Chinese	6/3/14	980,082
World Journal	Print	Chinese	6/3/14	350,000
CTI-TV	On-line	Chinese	6/4/14	1,661,357
CTI-TV (1st airing)	TV	Chinese	6/4/14	500,000
US Asian Post	On-line	Filipino	6/4/14	1,529
US Asian Post	Print	Filipino	6/4/14	157,500
Viet Bao Daily News	On-line	Vietnamese	6/4/14	76,067
Viet Bao Daily News	Print	Vietnamese	6/4/14	87,500
CTI-TV (2nd airing)	TV	Chinese	6/5/14	500,000
Philippine Tribune	On-line	Filipino	6/5/14	N/A
Philippine Tribune	Print	Filipino	6/5/14	105,000
Siam Media	On-line	Thai	6/6/14	N/A
Siam Media	Print	Thai	6/6/14	52,500
Chinese Biz News	Print	Chinese	6/7/14	105,000
HuaRenDianPing.com	On-line	Chinese	6/7/14	1,867
Korea Daily	On-line	Korean	6/9/14	300,000
Saigon Times	Print	Vietnamese	6/13/14	70,000
TVB-USA	TV	Chinese	7/9/14	82,900
TVB-USA	On-line	Chinese	7/10/14	14,840
World Journal	On-line	Chinese	11/7/14	980,082
World Journal	Print	Chinese	11/7/14	350,000
Korea Times	On-line	Korean	11/15/14	225,798
Korea Times	Print	Korean	11/15/14	270,550
Korea Times	On-line	Korean	11/22/14	225,798
Korea Times	Print	Korean	11/22/14	270,550
Total				8,788,741

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Summary Table:

PRINT MEDIA	IMPRESSIONS	PLACEMENTS
Chinese	994,000	5
Filipino	262,500	2
Korean	681,100	3
Thai	52,500	1
Vietnamese	157,500	2
TOTAL	2,147,600	13

TV MEDIA	IMPRESSIONS	PLACEMENTS
Chinese	1,582,900	4
Korean	250,000	1
TOTAL	1,832,900	5

ON-LINE MEDIA	IMPRESSIONS	PLACEMENTS
Chinese	3,942,843	9
Filipino	30,439	3
Korean	758,096	4
Thai	N/A	1
Vietnamese	76,067	1
TOTAL	4,807,445	18

SOCIAL MEDIA	IMPRESSIONS	PLACEMENTS
Korean	796	1
TOTAL	796	1

TOTAL PLACEMENTS 37
TOTAL IMPRESSIONS 8,788,741

Hispanic

In 2014, 10 earned media placements (9 CARE/FERA, and 1 ESA) programs within the Hispanic community totaled 817,540 earned media impressions.

Print

Information about SCE's CARE/FERA programs were conveyed in three publications including: Miniondas (circ. 45,000); Azteca News (circ. 42,000); and El Panamericano (circ. 25,000)

- Total Earned Placements: 3
- Total Circulation: 112,000
- Total Impressions: 392,000

Television

Two CARE/FERA interviews were conducted in Los Angeles' morning and evening newscast with KVEA-TV Telemundo Channel 52

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(viewership 29,159) and one ESA newscast was conducted with KMEX-TV Univision Channel 34 (viewership 123,511).

- Total Earned Hits: 3
- Total Viewership: 152,670

On-line

Four publications posted information about CARE/FERA on-line: El Clasificado (250,000); El Panamericano (2,500); Long Beach al Dia (300) and KVEA-TV (On-line = 20,070)

- Total Earned On-line Hits: 4
- Total On-line Visitors: 272,870

A brief summary of Hispanic total audience reach is as follows:

Total Print Impressions	392,000
Total On-line	272,870
Total Broadcast	152,670
Total Audience Reach	817,540

Media Placements – Hispanic Media

Media Outlet	Media Type	Publication/Air Date	Impressions
KMEX-TV Univisión 34 “Noticias 34” 6:00 p.m.	Television	5/19/2014	123,511
Miniondas	Print	6/5/2014	157,500
Long Beach Al Dia	On-line	6/6/2014	300
Azteca News	Print	6/11/2014	147,000
KVEA-TV Telemundo 52 “Buenos Días Los Angeles” 5:00 a.m.	Television	6/12/2014	3,159
KVEA-TV Telemundo 52 “Noticiero 52-A las 11p.m.”	Television	6/12/2014	26,000
Telemundo 52 (On-line)	On-line	6/12/2014	20,070
El Clasificado	On-line	6/16/2014	250,000
El Panamericano	Print	7/1/2014	87,500
El Panamericano	On-line	7/1/2014	2,500
TOTAL			817,540

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

Using the percentage of approved applications by volume from various outreach methods, SCE’s four most effective outreach methods in 2014 were:

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1. Call Center enrollment efforts, which generated 39% of all enrollments;
2. Collateral materials distributed at community outreach events directed customers to SCE's website for additional program information including how to enroll on-line. Strategic page placement of assistance programs information and direct links on sce.com web-site appeal to customers utilizing the internet. Customer enrolling via internet generated 18% of all enrollments;
3. Internal and external data sharing efforts, which generated 17% of enrollments; and
4. General enrollment efforts, which generated 15% of enrollments. General outreach efforts include the Capitation Fee Project and enrollments through third-party interactive voice response campaigns.

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

Through a variety of outreach, marketing and awareness campaigns, SCE has been persistent in its ongoing efforts to reach and enroll customers. In 2014, significant outreach efforts included, but were not limited to, active recruitment of new CARE Capitation agencies, multilingual outreach, ethnic and general market media, and designing CARE marketing materials and correspondence to reach increasing numbers of ethnic populations and under-penetrated geographic areas. SCE ended the 2014 program year at 87% penetration and will continue to vigorously market the program in attempting to achieve the 90% penetration rate goal.

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

SCE continued collaborating with Southern California Gas Company, Southwest Gas, Pacific Gas & Electric Company, and local water utilities as directed in D.11-05-020 to share CARE participant data electronically to assist customers to enroll in each utility's program. In 2014, approximately 44,987 customers were enrolled in SCE's CARE rate through sharing data with the aforementioned utilities.

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

Contractors who perform ESA assessment services assist customers in completing a CARE application, if the customer is qualified. Through this effort 4,214 customers enrolled in CARE during 2014. The CARE program continually integrates its efforts and messaging with the ESA program at all outreach events, communications, and marketing campaigns. SCE also enrolled 1,073 new CARE customers through the Energy Assistance Fund (EAF) program; which provides utility payment assistance through voluntary customer, employee, and shareholder donations.

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

SCE utilizes the Capitation Fee Project as a channel to coordinate with service providers of related low income programs to reach out and provide one-on-one assistance to SCE's hardest-to-reach customer base. In 2014, SCE partnered with food banks, clothing distribution centers, employment workshops, farmers' markets, faith and community based publications, school events and community fairs to coordinate the CARE program with their related services.

Each quarter, Low Income Home Energy Assistance Program (LIHEAP) payment recipients were automatically enrolled in CARE, which generated 1,736 enrollments in 2014.

- 2.4.7 *Describe the process for cross-referral of low-income customers between the utility and CSD. Describe how the utility's CARE customer discount information is provided to CSD for inclusion in its federal funds leveraging application. (Note: These agreements are limited to sharing 1-800 phone 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:

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

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

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

SCE continuously looks at areas of improvement for CARE enrollment and processing. In 2014, SCE implemented system enhancements to improve program processes and support regulatory changes. For example, SCE implemented an option for customers to safely and securely submit their enrollment, recertification or verification documents via an electronic facsimile, which allows scanned documents to be converted into a PDF and placed into a secured server for SCE CARE rep retrieval. SCE also added an “Opt In” check box on the CARE/FERA enrollment application to begin capturing cell phone numbers for those customers who agree to e-contacted via their cell phone for information relating to IQP programs.

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

2.5 Processing CARE Applications

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

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

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

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

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

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

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

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

SCE can make a comparison of outreach cost per enrollment. The following table shows that SCE's cost per enrollment is about 22 percent of the cost per enrollment for the Capitation Fee program.

Comparison of Cost per Enrollment between SCE and Third Parties			
	Enrolled	Outreach Cost	Cost per Enrollment
SCE ^[1]	292,513	\$1,780,272	\$6.09
Capitation Fee Project ^[2]	3,249	\$90,155	\$27.75
^[1] Includes all costs including capitation fees. Does not include enrollments from EMA contractors as they do not have an unbundled fee for a CARE enrollment. Does not include \$16,708 for FERA.			
^[2] Does not include \$1,798 for FERA.			

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

Comparison of Enrollment Effectiveness between SCE and Third Parties			
Enrollment Activity	Received	Approved	Percent
SCE			
SCE Call Center Requests	132,607	117,447	89%
SCE Direct Mail	27,693	22,005	79%
Special Projects/Events	28,210	26,642	94%
Internet Enrolments	53,506	53,377	100%
PG&E Data Exchange	-	-	-
SWG Data Exchange	-	-	-
SoCalGas Data Exchange	39,745	38,824	98%
Water Utilities Data Exchange	7,124	6,163	87%
DCSD Automatic Enrollment	-	-	0%
Other Miscellaneous Sources	55,198	26,292	48%
Third Parties			
Capitation Fee Project	3,617	3,249	90%
ESA Contractors	4,219	4,214	100%

2.6 Program Management

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

In 2014, there were no significant issues/events that impacted program management.

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3. CARE Expansion Program

3.1 Participant Information

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

CARE Expansion Program Participating Facilities by Month			
2014	CARE Residential Facilities	CARE Commercial Facilities	Total
January	402	176	578
February	403	175	578
March	424	176	600
April	414	175	589
May	410	177	587
June	409	176	585
July	428	183	611
August	424	183	607
September	424	183	607
October	441	183	624
November	451	183	634
December	443	182	625

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

Commercial/ Residential	ESTABLISH IN 2014		RECERT IN 2014		CLOSED in 2014	
	Service Accounts	No. of Beds	Service Accounts	No. of Beds	Service Accounts	No. of Beds
Residential	85	550	88	979	19	90
Commercial	9	730	32	1,969	4	95
TOTAL	94	1,280	120	2,948	23	185

3.2 Usage Information

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

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CARE Expansion Program Average Monthly Gas / Electric Usage		
Customer	Gas Therms	Electric KWh
Residential Facilities	N/A	918
Commercial Facilities	N/A	12,443

3.3 Program Costs

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

3.3.1.1 *Discount Information*

See CARE Table 1

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

The average annual CARE discount received per residential facility by energy source is \$731.21.

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

The average annual CARE discount received per commercial facility by energy source is \$5,991.63

3.4 Outreach

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

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

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3.4.2 *Discuss each of the following:*

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

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

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

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

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

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

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

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

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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 2014, there were no significant issues/events that impacted program management in this reporting period.

4. Fund Shifting

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

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

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

There was CARE fund shifting activity that occurred within the rules laid out in D.12-08-044. The fund shifts are listed in CARE- Table 1.

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

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

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5. Appendix: ESA and CARE Program Tables

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

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

	A	B	C	D	E	F	G	H	I	J
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report ESA Table 1 ESA Overall Program Expenses Southern California Edison									
2		2014 Authorized Budget			2014 Annual Expenses ⁽¹⁾			% of Budget Spent YTD		
3	ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
4	Energy Efficiency									
5	Appliances	\$ 21,018,838		\$ 21,018,838	\$ 15,930,083		\$ 15,930,083	76%		76%
6	Domestic Hot Water	\$ 51,405		\$ 51,405	\$ 15,192		\$ 15,192	30%		30%
7	Enclosure	\$ 267,540		\$ 267,540	\$ 67,098		\$ 67,098	25%		25%
8	HVAC	\$ 27,306,615		\$ 27,306,615	\$ 22,776,414		\$ 22,776,414	83%		83%
9	Maintenance	\$ 233,333		\$ 233,333	\$ 50,145		\$ 50,145	21%		21%
10	Lighting	\$ 3,272,401		\$ 3,272,401	\$ 2,572,324		\$ 2,572,324	79%		79%
11	Miscellaneous	\$ 4,726,931		\$ 4,726,931	\$ 3,678,448		\$ 3,678,448	78%		78%
12	Customer Enrollment	\$ 5,613,669		\$ 5,613,669	\$ 5,422,827		\$ 5,422,827	97%		97%
13	In Home Education	\$ 1,245,405		\$ 1,245,405	\$ 752,023		\$ 752,023	60%		60%
14	Pilot	\$ -		\$ -			\$ -	0%		0%
15	Energy Efficiency TOTAL	\$ 63,736,137		\$ 63,736,137	\$ 51,264,554		\$ 51,264,554	80%		80%
16										
17	Training Center	\$ 325,955		\$ 325,955	\$ 172,526		\$ 172,526	53%		53%
18	Inspections	\$ 1,579,538		\$ 1,579,538	\$ 862,949		\$ 862,949	55%		55%
19	Marketing and Outreach	\$ 1,373,000		\$ 1,373,000	\$ 653,142		\$ 653,142	48%		48%
20	Statewide Marketing Education and Outreach	\$ 120,000		\$ 120,000	\$ (298)		\$ (298)	0%		0%
21	Measurement and Evaluation Studies ⁽²⁾	\$ 200,000		\$ 200,000	\$ (306,356)		\$ (306,356)	-153%		-153%
22	Regulatory Compliance	\$ 606,000		\$ 606,000	\$ 528,249		\$ 528,249	87%		87%
23	General Administration	\$ 4,736,000		\$ 4,736,000	\$ 2,692,365		\$ 2,692,365	57%		57%
24	CPUC Energy Division	\$ 60,000		\$ 60,000	\$ 19,102		\$ 19,102	32%		32%
25										
26	TOTAL PROGRAM COSTS	\$ 72,736,630		\$ 72,736,630	\$ 55,886,233		\$ 55,886,233	77%		77%
27	Funded Outside of ESA Program Budget									
28	Indirect Costs				\$ 1,353,823		\$ 1,353,823			
29	NGAT Costs									
30										
31	⁽¹⁾ excluded \$264,537 for purchased but un-used inventory									
32	⁽²⁾ SCE received reimbursement from other IOUs in 2014 for cost incurred by SCE for joint studies managed by SCE.									

	A	B	C	D	E	F	G
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report ESA Table 3 ESA Program Cost-Effectiveness Southern California Edison						
2		PY - Recorded ^[1]					
3		Ratio of Benefits Over Costs			Net Benefits; \$ Millions		
4	Program Year ^[2]	Utility Cost Test	Total Resource Cost Test ^[3]	Modified Participant Test	Utility Cost Test	Total Resource Cost Test ^[3]	Modified Participant Test
5	2014	1.14	0.86	0.87	\$ 6.85	\$ (7.17)	\$ (6.67)
6	2013	0.96	0.83	0.81	\$ (2.27)	\$ (9.24)	\$ (10.08)
7	2012	0.74	0.59	0.71	\$ (9.75)	\$ (15.41)	\$ (10.96)
8	2011	0.69	0.55	0.69	\$ (15.48)	\$ (22.78)	\$ (15.63)
9	2010	0.77	0.59	0.74	\$ (14.85)	\$ (26.54)	\$ (17.07)
10	2009	0.77	0.61	0.76	\$ (9.70)	\$ (16.67)	\$ (10.39)
11	2008	0.72	0.61	0.75	\$ (10.81)	\$ (14.83)	\$ (9.45)
12	2007	0.59	0.52	1.29	\$ (13.25)	\$ (15.59)	\$ 9.29
13	2006	0.81	0.72	1.36	\$ (5.92)	\$ (8.91)	\$ 11.38
14	2005	0.69	0.59	0.99	\$ (6.98)	\$ (9.31)	\$ (0.17)
15	2004	0.82	0.63	1.05	\$ (2.89)	\$ (5.90)	\$ 0.79
16	2003	0.73	0.58	1.04	\$ (5.13)	\$ (7.70)	\$ 0.74
17	2002	1.08	0.93	1.94	\$ 1.16	\$ (1.14)	\$ 14.25
18							
19	E3 - Version SCE2013 V1c4						
20							
21	^[1] - Source of 2014 data				2014		
22	Resource Benefits, E3 Calculator				\$ 43,149,631		
23	Utility NEB, LIPPT Workbook				\$ 13,600,591		
24	Participant NEB, LIPPT Workbook				\$ 3,360,657		
25	Program Cost, E3 Calculator				\$ 55,886,232		
26	NPV Program Cost, E3 Calculator				\$ 50,320,444		
27	NPV Utility Cost, E3 Calculator				\$ 49,903,888		
28	NPV Bill Savings, LIPPT				\$ 39,869,484		
29							
30	^[2] Data from prior years have been entered from prior ESA (LIEE) Annual Reports						
31							
32	^[3] SCE calculated the Total Resource Cost Test results without non-energy benefits. The Commission directed the utilities to measure ESA program cost effectiveness using the Utility Cost Test and the Modified Participant Test with the appropriate non-energy benefits for each in D.01-12-020.						
33	Purchased but un-used inventory is excluded from calculations						
34							
35	PY 2014 Energy Savings Assistance Program Annual Report						
36		PY - Recorded					
37		Ratio of Benefits Over		Net Benefits; \$ Millions			
38	Program Year	ESACET	Resource TRC	ESACET	Resource TRC		
39	2014	1.19	1.44	\$ 9,790,434	\$ 13,081,574		
40	"Resource TRC" includes all measures listed as "Resource" in 2013 Cost Effectiveness Working Group white paper and measures listed as "Uncertain" with TRC ratios at or above 1.0						

	A	B	C	D	E	F	G
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report ESA Table 4 Detail by Housing Type and Source Southern California Edison						
2			2014 Energy Savings				
3	Customer	Housing Type	# Homes Treated	(MWh)	MW	(mTherm*)	2014 Expenses ^[1]
4	Gas and Electric Customers						
5	Owners - Total						
6		Single Family					
7		Multi Family					
8		Mobile Homes					
9	Renters - Total						
10		Single Family					
11		Multi Family					
12		Mobile Homes					
13	Electric Customers (only)						
14	Owners - Total						
15		Single Family	32,299	14,877	7.41		\$ -
16		Multi Family	536	155	0.02		\$ -
17		Mobile Homes	5,070	2,736	0.88		\$ -
18	Renters - Total						
19		Single Family	18,809	7,700	2.90		\$ -
20		Multi Family	18,733	6,037	0.90		\$ -
21		Mobile Homes	1,536	681	0.23		\$ -
22	Gas Customers (only)						
23	Owners - Total						
24		Single Family					
25		Multi Family					
26		Mobile Homes					
27	Renters - Total						
28		Single Family					
29		Multi Family					
30		Mobile Homes					
31							
32	Totals:		76,983	32,187	12	-	\$ -
33							
34							
35	Penetration History						
36	Year	Homes Treated ^[2]	Ineligible & Unwilling ^[3]	Estimated Eligible in Current Year ^[4]	Current Year Penetration Rate for Homes Treated		
37	2002	29,685					
38	2003	33,348					
39	2004	38,996					
40	2005	36,420					
41	2006	53,017					
42	2007	44,323					
43	2008	54,635					
44	2009	61,834	22,109	83,445	74%		
45	2010	121,016	41,110	83,445	145%		
46	2011	93,771	25,067	83,446	112%		
47	2012	49,026	19,833	87,389	56%		
48	2013	69,031	37,449	87,389	79%		
49	2014	76,983	40,596	87,389	88%		
50	2015						
51	2016						
52	2017						
53	2018						
54	2019						
55	2020						
56	Total Homes Treated since 2002	762,085					
57							
58	^[1] Excluding indirect program costs.						
59	^[2] Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative.						
60	^[3] Ineligible & Unwilling homes most typically include homes denied service due to the Modified 3 Measure Minimum Rule. Other situations are when owners refuse to make required copayments, postponements are requested, owners do not grant approval or submit authorization forms, accounts are not active, homes have been served through another program such as LIHEAP, documents are incomplete/missing, or customers are not interested.						
61	^[4] Based on Attachment F of D.12-08-044.						
62							
63							
64							
65							
66	Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory			
67	2014	PG&E	6,431	256			
68	2014	SDG&E	0	0			
69	2014	SoCalGas	1,268,874	31,224			

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	PY 2014 Energy Savings Assistance and CARE Programs Annual Report ESA Table 6 ESA Program Installation Cost of Program Installation Contractors Southern California Edison																		
1																			
2		Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2014 Program Total				
3			Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households	Costs [1][4]	Cost/ Unit	Cost/ Household
4			Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
5	Dwellings	Each	277,192	77%	70,482	82%	49,283,251	96%	80,496	22.5%	15,446	18.0%	1,987,838	3.9%	357,688	85,928	\$ 51,271,089	\$143	\$597
6	Appliances																		
7	High Efficiency Clothes Washer	Each																	
8	Refrigerators	Each	17,725	100%	17,725	100%	15,930,083	100%		0.0%		0.0%		0.0%	17,725	17,725	\$ 15,930,083	\$899	\$899
9	Microwaves	Each																	
10	Domestic Hot Water																		
11	Water Heater Blanket	Home	58	100%	58	100%	2,714	100%		0.0%		0.0%		0.0%	58	58	\$ 2,714	\$47	\$47
12	Low Flow Shower Head	Home	259	100%	272	100%	7,284	100%		0.0%		0.0%		0.0%	259	272	\$ 7,284	\$28	\$27
13	Water Heater Pipe Insulation	Home	138	100%	138	100%	2,381	100%		0.0%		0.0%		0.0%	138	138	\$ 2,381	\$17	\$17
14	Faucet Aerator	Home	256	100%	256	100%	2,814	100%		0.0%		0.0%		0.0%	256	256	\$ 2,814	\$11	\$11
15	Water Heater Repair/Replacement	Each																	
16	Thermostatic Shower Valve	Each																	
17	Enclosure																		
18	Air Sealing / Envelope	Home	541	96%	541	96%	60,199	96%	25	4.4%	25	4.4%	2,582	4.1%	566	566	\$ 62,781	\$111	\$111
19	Attic Insulation	Home	7	100%	7	100%	4,317			0.0%		0.0%			7	7	\$ 4,317	\$617	\$617
20	HVAC																		
21	FAU Standing Pilot Light Conversion	Each																	
22	Furnace Repair/Replacement	Each	2	100%	2	100%	1,778	100%							2	2	\$ 1,778	\$889	\$889
23	Room A/C Replacement	Each	728	100%	633	100%	553,837	100%		0.0%		0.0%		0.0%	728	633	\$ 553,837	\$761	\$875
24	Central A/C Replacement	Each	3,045	100%	3,035	100%	10,841,678	100%		0.0%		0.0%		0.0%	3,045	3,035	\$ 10,841,678	\$3,560	\$3,572
25	Heat Pump Replacement	Each	108	100%	108	100%	399,871	100%		0.0%		0.0%		0.0%	108	108	\$ 399,871	\$3,703	\$3,703
26	Evaporative Coolers (Replacement)	Each																	
27	Evaporative Coolers (Installation)	Each	11,181	100%	11,181	100%	10,348,250	100%		0.0%		0.0%		0.0%	11,181	11,181	\$ 10,348,250	\$926	\$926
28	Duct Testing and Sealing	Home	3,016	100%	3,017	100%	631,000	100%		0.0%		0.0%		0.0%	3,016	3,017	\$ 631,000	\$209	\$209
29	Maintenance																		
30	Furnace Clean and Tune	Home																	
31	Central A/C Tune-up	Home	380	100%	380	100%	50,145	100%		0.0%		0.0%		0.0%	380	380	\$ 50,145	\$132	\$132
32	Evaporative Cooler Maintenance	Home																	
33	Lighting																		
34	Compact Fluorescent Lights (CFLs)	Each	202,846	74%	45,081	72%	1,444,434	74%	69,599	25.5%	17,609	28.1%	503,244	25.8%	272,445	62,690	\$ 1,947,678	\$7	\$31
35	Interior Hard wired CFL fixtures	Each																	
36	Exterior Hard wired CFL fixtures	Each	1,112	100%	610	100%	94,520	100%		0.0%		0.0%		0.0%	1,112	610	\$ 94,520	\$85	\$155
37	Torchiere	Each	8,137	97%	8,137	97%	512,976	97%	267	3.2%	267	3.2%	17,150	3.2%	8,404	8,404	\$ 530,126	\$63	\$63
38	Occupancy Sensor	Each																	
39	LED Night Lights	Each																	
40	Miscellaneous																		
41	Pool Pumps	Each	2,087	100%	2,087	100%	2,477,787	100%	-1	0.0%	-1	0.0%	-1,193	0.0%	2,086	2,086	\$ 2,476,594	\$1,187	\$1,187
42	Smart Power Strips	Each	25,566	71%	25,566	71%	849,368	71%	10,606	29.3%	10,606	29.3%	352,486	29.3%	36,172	36,172	\$ 1,201,854	\$33	\$33
43	Pilots																		
44		Each																	
45		Each																	
46	Customer Enrollment																		
47	Outreach & Assessment	Home	62,230	77%	62,230	77%	4,455,772	82%	18,680	23.1%	18,680	23.1%	973,147	17.9%	80,910	80,910	\$ 5,428,918	\$67	\$67
48	In-Home Education	Home	48,915	73%	48,915	73%	612,045	81%	17,665	26.5%	17,665	26.5%	140,423	18.7%	66,580	66,580	\$ 752,468	\$11	\$11

	A	B	C	D	E
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report ESA Table 7 Expenditures Recorded by Cost Element Southern California Edison				
2	ESA Program:	Labor ^[1]	Non-Labor ^[2]	Contract ^[3]	Total
3	Energy Efficiency				
4	Appliances			\$ 15,930,083	\$ 15,930,083
5	Domestic Hot Water			\$ 15,192	\$ 15,192
6	Enclosure			\$ 67,098	\$ 67,098
7	HVAC			\$ 22,776,414	\$ 22,776,414
8	Maintenance			\$ 50,145	\$ 50,145
9	Lighting			\$ 2,572,324	\$ 2,572,324
10	Miscellaneous			\$ 3,678,448	\$ 3,678,448
11	Customer Enrollment			\$ 5,422,827	\$ 5,422,827
12	In Home Education			\$ 752,023	\$ 752,023
13	Pilot			\$ -	\$ -
14	Energy Efficiency TOTAL			\$ 51,264,554	\$ 51,264,554
15		\$ -	\$ -		
16	Training Center	\$ 145,500	\$ 22,923	\$ 4,104	\$ 172,526
17	Inspections	\$ 116,969	\$ 8,657	\$ 737,323	\$ 862,949
18	Marketing and Outreach		\$ 298,853	\$ 354,290	\$ 653,142
19	Statewide Marketing Education and Outreach		\$ (298)		\$ (298)
20	Measurement and Evaluation Studies		\$ (3,123)	\$ (303,232)	\$ (306,356)
21	Regulatory Compliance	\$ 548,139	\$ (19,890)		\$ 528,249
22	General Administration	\$ 1,696,472	\$ 277,711	\$ 718,182	\$ 2,692,365
23	CPUC Energy Division		\$ 19,102		\$ 19,102
24					
25	TOTAL PROGRAM COSTS	\$ 2,507,080	\$ 603,933	\$ 52,775,220	\$ 55,886,233
26					
27	^[1] Labor costs include any internal direct (administrative and/or implementation) costs (indirect costs are a separate line item), burdened by overhead, that represents person hours.				
28	^[2] Non-Labor costs include all direct internal (administrative and/or implementation) costs (indirect costs are given as a separate line item) not covered under labor.				
29	^[3] Contract costs include all outsourced costs (administrative and/or implementation). Contract costs do not need to be further broken out by labor/non-labor. This category includes agency employees.				

	A	B	C	D	E	F	G	H	I
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report ESA Table 8 ESA Homes Unwilling / Unable to Participate Southern California Edison								
2	Reason Provided								
3	County	Customer/ Landlord Declined Program Measures or is Non- Responsive	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Insufficient feasible Measures	Ineligible Dwelling - Prior Program Participation ^[1]	Household Income Exceeds Allowable Limits ^[1]	Unable to Provide Required Documentation	Other
4	Fresno	-	-	-	-	1	-	-	-
5	Imperial	-	-	-	-	-	-	-	-
6	Inyo	-	1	-	2	2	1	7	9
7	Kern	7	7	1	88	686	16	249	443
8	Kings	5	4	-	28	217	2	34	71
9	Los Angeles	96	124	36	843	21,951	457	6,441	12,433
10	Madera	-	-	-	-	-	-	-	-
11	Mono	-	-	-	-	-	-	-	-
12	Orange	19	58	-	217	4,333	352	1,383	2,627
13	Riverside	46	52	3	383	5,966	177	2,223	2,941
14	San Bernardino	183	134	18	827	8,004	278	2,648	3,381
15	San Diego	-	-	-	-	-	-	-	-
16	Santa Barbara	1	3	-	4	4	6	1	19
17	Tulare	47	36	5	305	2,555	14	278	787
18	Tuolumne	-	-	-	-	-	-	-	-
19	Ventura	1	3	3	45	689	64	204	782
20	Total	405	422	66	2,742	44,408	1,367	13,468	23,493
21									
22	^[1] Not considered "Unwilling" nor "Unable". Counts from these columns are not included in summary count of 40,596 Unwilling/Unable households elsewhere in report.								

	A	B	C	D	E	F	G
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report ESAP Table 9 Life Cycle Bill Savings by Measure Southern California Edison						
2	Measure Description		2014 Number Installed	Per Measure Electric Impact - Average (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2014 Total Measure Life Cycle Bill Savings ^[1]
3	Appliances						
4	High Efficiency Clothes Washer	Each					
5	Refrigerators	Each	17,725	690			\$ 16,509,528
6	Microwaves	Each					
7	Domestic Hot Water						
8	Water Heater Blanket	Home	58	52			\$ 2,370
9	Low Flow Shower Head	Home	259	35			\$ 9,426
10	Water Heater Pipe Insulation	Home	138	16			\$ 2,488
11	Faucet Aerator	Home	256	22			\$ 5,935
12	Water Heater Repair/Replacement	Each					
13	Thermostatic Shower Valve	Each					
14	Enclosure						
15	Air Sealing / Envelope	Home	566	94			\$ 60,097
16	Attic Insulation	Home	7	-			-
17	HVAC						
18	FAU Standing Pilot Light Conversion	Each					
19	Furnace Repair/Replacement	Each	2	-			
20	Room A/C Replacement	Each	728	54			\$ 37,745
21	Central A/C Replacement	Each	3,045	81			\$ 346,872
22	Heat Pump Replacement	Each	108	639			\$ 97,691
23	Evaporative Coolers (Replacement)	Each					
24	Evaporative Coolers (Installation)	Each	11,181	501			\$ 7,928,400
25	Duct Testing and Sealing	Home	3,016	184			\$ 882,065
26	Maintenance						
27	Furnace Clean and Tune	Home					
28	Central A/C Tune-up	Home	380	158			\$ 35,513
29	Evaporative Cooler Maintenance	Home					
30	Lighting						
31	Compact Fluorescent Lights (CFLs)	Each	272,445	25			\$ 6,598,420
32	Interior Hard wired CFL fixtures	Each					
33	Exterior Hard wired CFL fixtures	Each	1,112	79			\$ 129,003
34	Torchiere	Each	8,404	191			\$ 2,370,955
35	Occupancy Sensor	Each					
36	LED Night Lights	Each					
37	Miscellaneous						
38	Pool Pumps	Each	2,086	1,744			\$ 3,827,733
39	Smart Power Strips	Each	36,172	32			\$ 1,025,243
40	Pilots						
41		Each					
42							
43	Total Homes Served By the Program	76,983					\$ 39,869,484
44	Life Cycle Bill Savings Per Home						\$ 517.90
45							
46	^[1] Net Present Values of Lifecycle Bill Savings						

	A	B	C
	PY 2014 Energy Savings Assistance and CARE Programs Annual Report ESA Table 10 Energy Rate Used for Bill Savings Calculations Southern California Edison		
1			
2	Year	\$/kWh [1]	\$/Therm
3	2014	0.1298	N/A
4	2015	0.1337	N/A
5	2016	0.1377	N/A
6	2017	0.1418	N/A
7	2018	0.1461	N/A
8	2019	0.1505	N/A
9	2020	0.1550	N/A
10	2021	0.1596	N/A
11	2022	0.1644	N/A
12	2023	0.1694	N/A
13	2024	0.1744	N/A
14	2025	0.1797	N/A
15	2026	0.1851	N/A
16	2027	0.1906	N/A
17	2028	0.1963	N/A
18	2029	0.2022	N/A
19	2030	0.2083	N/A
20	2031	0.2145	N/A
21	2032	0.2210	N/A
22	2033	0.2276	N/A
23	2034	0.2344	N/A
24	2035	0.2415	N/A
25	2036	0.2487	N/A
26	2037	0.2562	N/A
27	2038	0.2639	N/A
28			

	A	B	C	D	E
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report ESA Table 11 Bill Savings Calculations by Program Year Southern California Edison				
2	Program Year ^[1]	Program Costs ^[1]	Program Lifecycle Bill Savings ^[2]	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings ^[2]
3	2012	\$ 39,378,995	\$ 24,591,923	0.62	\$ 501.61
4	2013	\$ 55,604,816	\$ 40,191,998	0.72	\$ 582.23
5	2014	\$ 55,886,233	\$ 39,869,484	0.71	\$ 517.90

²¹ Numbers reported in standard accounting format, with negative amounts displayed in parentheses (\$xxx.xx).

	A	B
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report ESA Table 13 Categorical and Other Enrollment Southern California Edison	
2	Type of Enrollment	Number of customers treated ^[1]
3	Women, Infants, and Children Program (WIC)	9,759
4	Supplemental Security Income (SSI)	4,321
5	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	5,610
6	CalWORKs/Temporary Assistance for Needy Families (TANF)	1,436
7	Tribal TANF	10
8	Medicaid/Medi-Cal for Families	4,105
9	Healthy Families A&B	217
10	National School Lunch Program (NSLP) - Free Lunch	1,134
11	Low-income Home Energy Assistance Program (LIHEAP)	1
12	Bureau of Indian Affairs General Assistance	1
13	Head Start Income Eligible - (Tribal Only)	-
14	Other (specify) - Subsidized Housing	71
15	^[1] Number of customers treated reflects categorical programs selected by customer. Please note in some case customer select more than one eligible program for a single account.	

	A	B	C	D	E	F
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report ESA Table 15 Lighting Southern California Edison					
2						
3	ESA Program CFL Tracking Table					
4	<i>Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each</i>					
5	Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	Admin. Cost (overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin)	AB 1109 Compliant? ^[1]
6	Autocell Electronics, Inc.	13 Watt - CFL	1.82	5	6.82	Yes
7	Autocell Electronics, Inc.	19 Watt - CFL	2.29	5	7.29	Yes
8	Autocell Electronics, Inc.	23 Watt - CFL	2.36	5	7.36	Yes
9						
10						
11	Year	Number of Homes Treated in ESA Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs ^[2]	
12	2014	76,983	62,690	4.35	6,811,448	
13						
14						
15	^[1] Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standatds for general purpose lighting? 2) Do all models comply with Europe's RoHS standards on toxicity?					
16						
17	^[2] Energy savings used are from the Load Impact Evaluation of the 2009 Energy Savings Assistance Program.					

	A	B	C	D	E	F	G	H
	PY 2014 Energy Savings Assistance and CARE Programs Annual Report							
	ESA Table 16							
	"Add Back" Measures							
1	Southern California Edison							
2			Ratio of Benefits Over Costs					
			Utility	Modified	Total		Budget	Energy Savings
3	Measure	Climate Zone	Cost Test	Participant Test	Resource Cost Test	Quantity Installed	Impact of "Add Back"	Impact (kWh Annual) ^[2]
4	Central Heat Pump - Mobile Home Zone 15	15	0.47	0.44	0.33	5	\$ 19,475	5,295
5	Central Heat Pump - Multi-Family Zone 15	15	0.35	0.33	0.23	14	\$ 48,042	9,443
6	Central Heat Pump - Single Family Zone 15	15	0.29	0.27	0.19	78	\$ 286,153	45,809
7	Central Air Conditionning - Mobile Home Zone 14	14	-	-	-	109	\$ 377,289	
8	Central Air Conditionning - Mobile Home Zone 15	15	-	-	-	89	\$ 311,602	
9	Central Air Conditionning - Multi-Family Zone 14	14	-	-	-	147	\$ 530,910	
10	Central Air Conditionning - Multi-Family Zone 15	15	-	-	-	120	\$ 373,822	
11	Central Air Conditionning - Single Family Zone 14	14	0.06	0.04	0.05	1,961	\$ 7,087,956	150,036
12	Central Air Conditionning - Single Family Zone 15	15	0.12	0.08	0.09	619	\$ 2,160,106	95,165
13	Room Air Conditioner - Mobile Home Zone 10	10	-	-	-	77	\$ 56,848	-
14	Room Air Conditioner - Mobile Home Zone 13	13	-	-	-	26	\$ 20,150	-
15	Room Air Conditioner - Mobile Home Zone 14	14	-	-	-	34	\$ 25,785	-
16	Room Air Conditioner - Mobile Home Zone 15	15	-	-	-	16	\$ 12,045	-
17	Room Air Conditioner - Multi-Family Zone 10	10	-	-	-	5	\$ 3,938	-
18	Room Air Conditioner - Multi-Family Zone 13	13	-	-	-	2	\$ 1,554	-
19	Room Air Conditioner - Multi-Family Zone 14	14	-	-	-	11	\$ 8,655	-
20	Room Air Conditioner - Multi-Family Zone 15	15	-	-	-	2	\$ 1,553	-
21	Room Air Conditioner - Single Family Zone 10	10	0.17	0.11	0.13	249	\$ 186,738	17,188
22	Room Air Conditioner - Single Family Zone 13	13	0.14	0.09	0.12	185	\$ 143,708	11,128
23	Room Air Conditioner - Single Family Zone 14	14	0.19	0.12	0.15	103	\$ 78,823	7,881
24	Room Air Conditioner - Single Family Zone 15	15	0.35	0.22	0.29	18	\$ 14,040	2,767
25	Central AC Maintenance - Mobile Home Zone 14	14	0.22	0.14	0.18	9	\$ 1,200	234
26	Central AC Maintenance - Mobile Home Zone 15	15	0.22	0.14	0.18	7	\$ 910	182
27	Central AC Maintenance - Multi-Family Zone 14	14	0.24	0.15	0.19	1	\$ 130	27
28	Central AC Maintenance - Multi-Family Zone 15	15	0.23	0.15	0.18	82	\$ 10,690	2,214
29	Central AC Maintenance - Single Family Zone 14	14	1.36	0.85	1.10	240	\$ 31,740	48,960
30	Central AC Maintenance - Single Family Zone 15	15	1.35	0.86	1.09	42	\$ 5,475	8,568
31	Envelope & Air Sealing - Mobile Home 6	6	-	-	-	-		-
32	Envelope & Air Sealing - Moible Home 8	8	-	-	-	-		-
33	Envelope & Air Sealing - Mobile Home 9	9	0.52	0.41	0.39	1	\$ 171	54.00
34	Envelope & Air Sealing - Mobile Home 10	10	1.31	1.02	0.99	4	\$ 411	384.96
35	Envelope & Air Sealing - Mobile Home 13	13	1.84	1.44	1.40	2	\$ 131	196.32
36	Envelope & Air Sealing - Mobile Home 14	14	1.25	0.98	0.95	7	\$ 843	745.99
37	Envelope & Air Sealing - Mobile Home 15	15	0.41	0.32	0.31	2	\$ 445	108.00
38	Envelope & Air Sealing - Mobile Home 16	16	1.09	0.85	0.83	2	\$ 130	96.96
39	Envelope & Air Sealing - Multi Family 6	6	0.54	0.42	0.41	50	\$ 5,764	1,900.00
40	Envelope & Air Sealing - Multi Family 8	8	0.50	0.39	0.38	47	\$ 7,806	2,375.85
41	Envelope & Air Sealing - Multi Family 9	9	0.99	0.77	0.75	52	\$ 5,849	3,874.00
42	Envelope & Air Sealing - Multi Family 10	10	1.42	1.11	1.08	45	\$ 4,134	4,330.80
43	Envelope & Air Sealing - Multi Family 13	13	1.43	1.12	1.08	70	\$ 6,528	6,871.20
44	Envelope & Air Sealing - Multi Family 14	14	2.71	2.12	2.06	49	\$ 1,825	5,221.93
45	Envelope & Air Sealing - Multi Family 15	15	2.50	1.96	1.90	17	\$ 1,494	3,691.89
46	Envelope & Air Sealing - Single Family 6	6	0.49	0.38	0.37	35	\$ 4,486	1,330.00
47	Envelope & Air Sealing - Single Family 8	8	0.35	0.28	0.27	20	\$ 4,851	1,011.00
48	Envelope & Air Sealing - Single Family 9	9	0.60	0.47	0.45	12	\$ 2,433	894.00
49	Envelope & Air Sealing - Single Family 10	10	1.38	1.08	1.05	36	\$ 3,442	3,464.64
50	Envelope & Air Sealing - Single Family 13	13	1.07	0.84	0.81	16	\$ 2,147	1,570.56
51	Envelope & Air Sealing - Single Family 14	14	0.93	0.73	0.71	53	\$ 9,150	5,648.21
52	Envelope & Air Sealing - Single Family 15	15	2.22	1.74	1.69	42	\$ 4,522	9,121.14
53	Envelope & Air Sealing - Single Family 16	16	0.58	0.46	0.44	4	\$ 539	193.92
54								
55	^[1] Dollars spent on these Add Back Measures							
56	^[2] All measures provide energy savings by upgrading existing equipment or in the case of evaporative coolers are installed in homes with functional air conditioners to provide an alternative to operating the existing air conditioners on all but the most humid days.							
	^[3] Central A/C Service added back by Commission policy in D.12-08-044 Ordering Paragraph 52.							
57	All other measures are add-backs based on cost-effectiveness results below 0.25 ratio for both the TRC and MPT tests in 2012 per D.12-08-044. These measures were "added back" by the Commission in Ordering Paragraphs 41 (Envelope & Air Sealing), 45 (Central AC), 46 (Room AC), 48 (Heat Pumps).							

[illegible]

		A	B	C	D	E	F	G	H	I
		PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 3A Post-Enrollment Verification Results (Model) 2014 Southern California Edison								
1										
2		2014	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify	CARE Households De-Enrolled (Due to no response)	CARE Households De-Enrolled (Verified as Ineligible) ^[1]	Total Households De-Enrolled ^[2]	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-Enrolled
3	January		1,324,151	2,586	0.20%	1,553	39	1,592	61.56%	0.12%
4	February		1,331,639	4,482	0.34%	2,605	75	2,680	59.79%	0.20%
5	March		1,321,633	4,909	0.37%	2,870	79	2,949	60.07%	0.22%
6	April		1,314,890	6,209	0.47%	3,870	85	3,955	63.70%	0.30%
7	May		1,312,506	6,450	0.49%	4,005	84	4,089	63.40%	0.31%
8	June		1,319,075	10,311	0.78%	6,769	94	6,863	66.56%	0.52%
9	July		1,321,221	8,000	0.61%	4,853	104	4,957	61.96%	0.38%
10	August		1,322,556	4,877	0.37%	3,778	23	3,801	77.94%	0.29%
11	September		1,333,416	243	0.02%	164	1	165	67.90%	0.01%
12	October		1,329,323	5,416	0.41%	3,372	53	3,425	63.24%	0.26%
13	November		1,321,462	1,887	0.14%	1,199	16	1,215	64.39%	0.09%
14	December		1,311,210	83	0.01%	39	0	39	46.99%	0.00%
15	YTD Total		1,311,210	55,453	4.23%	35,077	653	35,730	64.43%	2.72%
16										
17	[1] Includes customers verified as over income or who requested to be de-enrolled.									
18	[2] Verification results are tied to the month initiated. Therefore, verification results may be pending due to the time permitted for a participant to respond.									
19	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.									
20										
21										
		PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 3B Post-Enrollment Verification Results (High Usage) 2014 Southern California Edison								
22										
		2014	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify	CARE Households De-Enrolled (Due to no response)	CARE Households De-Enrolled (Verified as Ineligible) ^[1]	Total Households De-Enrolled ^[2]	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-Enrolled
23	January		1,324,151	4,161	0.31%	3,842	54	3,896	93.63%	0.29%
24	February		1,331,639	2,407	0.18%	2,090	67	2,157	89.61%	0.16%
25	March		1,321,633	2,099	0.16%	1,810	58	1,868	88.99%	0.14%
26	April		1,314,890	697	0.05%	598	13	611	87.66%	0.05%
27	May		1,312,506	471	0.04%	415	7	422	89.60%	0.03%
28	June		1,319,075	793	0.06%	714	9	723	91.17%	0.05%
29	July		1,321,221	683	0.05%	615	8	623	91.22%	0.05%
30	August		1,322,556	2,470	0.19%	2,201	56	2,257	91.38%	0.17%
31	September		1,333,416	0	0.00%	0	0	0	0.00%	0.00%
32	October		1,329,323	2,921	0.22%	2,659	61	2,720	93.12%	0.20%
33	November		1,321,462	14,919	1.13%	13,418	394	13,812	92.58%	1.05%
34	December		1,311,210	6,375	0.49%	5,558	137	5,695	89.33%	0.43%
35	YTD Total		1,311,210	37,996	2.90%	33,920	864	34,784	91.55%	2.65%
36										
37										
38	[1] Includes customers verified as over income or who requested to be de-enrolled.									
39	[2] Verification results are tied to the month initiated. Therefore, verification results may be pending due to the time permitted for a participant to respond.									
40	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.									

	A	B	C	D	E	F	G	H	I	J
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 5 CARE Enrollment by County Southern California Edison									
2		Estimated Eligible			Total Participants			Penetration Rate		
3	County	Urban	Rural ^[1]	Total	Urban	Rural ^[1]	Total	Urban	Rural ^[1]	Total
4	Fresno	481	0	481	52	0	52	11%	0%	11%
5	Imperial	0	238	238	0	54	54	0%	23%	23%
6	Inyo	7	1,820	1,827	0	1,016	1,016	0%	56%	56%
7	Kern	12,624	17,953	30,577	9,467	14,187	23,654	75%	79%	77%
8	Kings	0	8,895	8,895	0	9,190	9,190	0%	103%	103%
9	Los Angeles	611,467	3,420	614,887	562,527	1,740	564,267	92%	51%	92%
10	Madera	4	0	4			0	0%	0%	0%
11	Mono	1	3,368	3,369	0	679	679	0%	20%	20%
12	Orange	212,480	1	212,481	168,147	0	168,147	79%	0%	79%
13	Riverside	108,618	106,596	215,214	85,072	97,429	182,501	78%	91%	85%
14	San Bernardino	215,667	45,382	261,049	198,535	38,690	237,225	92%	85%	91%
15	San Diego	0	2	2	0	1	1	0%	50%	50%
16	Santa Barbara	18,500	0	18,500	9,683	0	9,683	52%	0%	52%
17	Tulare	14,256	48,275	62,531	12,317	45,405	57,722	86%	94%	92%
18	Ventura	67,168	2,607	69,775	55,104	1,915	57,019	82%	73%	82%
19	Total	1,261,273	238,557	1,499,830	1,100,904	210,306	1,311,210	87%	88%	87%
20										
21										
22	^[1] 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.									

[illegible]

	A	B	C	D	E	F	G	H
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 7 CARE Capitation Contractors Southern California Edison							
2	Contractor Name ^[1]	Contractor Type (Check one or more if applicable)				Enrollments ^[3]		
3		Private	CBO	WMDVBE ^[2]	LIHEAP	Rural	Urban	Total
4	Alpha Enterprises	X						0
5	Antelope Valley Boys & Girls Club		X	X				0
6	APAC Service Center	X					60	60
7	Armenian Relief Society		X					0
8	Asian American Drug Abuse Program		X				26	26
9	Asian American Resource Center		X			1	4	5
10	Asian Youth Center		X				1	1
11	Best Buy Co., Inc. (113-SantaClarita)	X		X				0
12	Best Buy Co., Inc. (114-Fullerton)	X		X				0
13	Best Buy Co., Inc. (1009-LongBeach)	X		X				0
14	Best Buy Co., Inc. (1011-ElSegundo)	X		X				0
15	Best Buy Co., Inc. (1018-Glendora)	X		X				0
16	Best Buy Co., Inc. (1020-LaQuinta)	X		X				0
17	Best Buy Co., Inc. (102-W Covina)	X		X				0
18	Best Buy Co., Inc. (103-City of Industry)	X		X				0
19	Best Buy Co., Inc. (104-Hawthorne)	X		X				0
20	Best Buy Co., Inc. (105-R.Cucamonga)	X		X				0
21	Best Buy Co., Inc. (106-Palmdale)	X		X				0
22	Best Buy Co., Inc. (1076-Temecula)	X		X				0
23	Best Buy Co., Inc. (107-Torrance)	X		X				0
24	Best Buy Co., Inc. (108-Victorville)	X		X				0
25	Best Buy Co., Inc. (109-W. LA)	X		X				0
26	Best Buy Co., Inc. (110-Riverside)	X		X				0
27	Best Buy Co., Inc. (1119-Signal Hill)	X		X				0
28	Best Buy Co., Inc. (111-Westminster)	X		X				0
29	Best Buy Co., Inc. (112-ThousandOaks)	X		X				0
30	Best Buy Co., Inc. (1150-Ontario)	X		X				0
31	Best Buy Co., Inc. (115-Murrieta)	X		X				0
32	Best Buy Co., Inc. (116-CanogaPark)	X		X				0
33	Best Buy Co., Inc. (117-Cerritos)	X		X				0
34	Best Buy Co., Inc. (1180-Northridge)	X		X				0
35	Best Buy Co., Inc. (118-Oxnard)	X		X				0
36	Best Buy Co., Inc. (1198-Orange-Tustin)	X		X				0
37	Best Buy Co., Inc. (119-Costa Mesa)	X		X				0
38	Best Buy Co., Inc. (124-PalmDesert)	X		X				0
39	Best Buy Co., Inc. (125-Pasadena)	X		X				0
40	Best Buy Co., Inc. (126-YorbaLinda)	X		X				0
41	Best Buy Co., Inc. (127-Lakewood)	X		X				0
42	Best Buy Co., Inc. (130-PorterRnch)	X		X				0
43	Best Buy Co., Inc. (131-Montclair)	X		X				0
44	Best Buy Co., Inc. (1391-Goleta)	X		X				0
45	Best Buy Co., Inc. (1409-Menifee)	X		X				0
46	Best Buy Co., Inc. (1430-MorenoVly)	X		X				0
47	Best Buy Co., Inc. (1432-Compton)	X		X				0
48	Best Buy Co., Inc. (1441-Beaumont)	X		X				0
49	Best Buy Co., Inc. (1472-Tustin)	X		X				0
50	Best Buy Co., Inc. (1482-AppleValley)	X		X				0
51	Best Buy Co., Inc. (150-SanBernardino)	X		X				0
52	Best Buy Co., Inc. (1510-ClvrCty Mall)	X		X				0
53	Best Buy Co., Inc. (1511-Pacomia)	X		X				0
54	Best Buy Co., Inc. (1537-Montebello)	X		X				0
55	Best Buy Co., Inc. (179-CulverCty)	X		X				0
56	Best Buy Co., Inc. (183-Glendale)	X		X				0
57	Best Buy Co., Inc. (2514-Fullerton)	X		X				0
58	Best Buy Co., Inc. (367-Westwood)	X		X				0
59	Best Buy Co., Inc. (392-CynSprings)	X		X				0
60	Best Buy Co., Inc. (393-W.Hollywood)	X		X				0

	A	B	C	D	E	F	G	H
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 7 CARE Capitation Contractors Southern California Edison							
2	Contractor Name ^[1]	Contractor Type (Check one or more if applicable)				Enrollments ^[3]		
3		Private	CBO	WMDVBE ^[2]	LIHEAP	Rural	Urban	Total
61	Best Buy Co., Inc. (529-Visalia)	X		X				0
62	Best Buy Co., Inc. (649-SimiValley)	X		X				0
63	Best Buy Co., Inc. (764-ShermanOaks)	X		X				0
64	Best Buy Co., Inc. (774-Tustin)	X		X				0
65	Best Buy Co., Inc. (775-MiraLoma)	X		X				0
66	Best Buy Co., Inc. (846-ChinoHills)	X		X				0
67	Best Buy Co., Inc. (847-Corona)	X		X				0
68	Best Buy Co., Inc. (854-Irvine)	X		X				0
69	Best Buy Co., Inc. (872-Downey)	X		X				0
70	Best Buy Co., Inc. (947-Orange)	X		X				0
71	Best Buy Stores, LP (1782-Duarte)	X		X				0
72	Best Partners (AKA: Energy Conservation Consultants, Inc - ECC)	X				8	896	904
73	Bethel Baptist Church		X					0
74	Bishop Paiute Tribe	X				11		11
75	Boys & Girls Club of Stanton		X					0
76	Boys and Girls Club of San Gabriel Valley		X					0
77	Cambodian Family, The		X					0
78	Cap of San Bernardino Cty		X		X			0
79	Caregivers: Volunteers Assisting The Elderly		X					0
80	Catholic Charities - Los Angeles		X					0
81	Center for Successful Aging		X					0
82	Chinese Christian Herald Crusades		X				14	14
83	Chino Neighborhood House		X					0
84	Christ Our Redeemer Community Development Corporation		X					0
85	Christ Unity Center		X					0
86	CitiHousing Real Estate Services	X						0
87	Citrus Valley Health Partners		X					0
88	City Impact		X					0
89	City of Beaumont Senior Center		X				1	1
90	Comm Action of Venture County		X		X			0
91	Community Action Partnership of Riverside County		X		X			0
92	Community Center at Tierra del Sol	X	X					0
93	Community Pantry	X	X					0
94	Community Settlement Association		X					0
95	Corona-Norco Family YMCA		X				5	5
96	Costa Mesa Comm Foundation		X					0
97	Council on Aging - Orange County (HICAP)		X					0
98	Crisis Ministry Church of Vly		X					0
99	Cross Connexion	X						0
100	Desert Arc		X			1	3	4
101	Desert Manna Ministries, Inc.		X					0
102	Disabled Resources Center, Inc.		X				3	3
103	El Conicilio Family Services		X				1	1
104	Faith Temple Church		X					0
105	Family Service Association of Redlands	X					5	5
106	Food Share		X				2	2
107	GO THE CALENDAR STOP	X				1	2,093	2,094
108	Heart of Compassion		X					0
109	Help of Ojai, Inc.		X				1	1
110	High Desert Domestic Violence Program, Inc.		X					0
111	High Desert Transitional Living Connection		X					0
112	Hollon Marketing Systems	X						0
113	Home of Neighborly Service		X					0
114	Homemaker Service of IWV		X					0
115	Housing Authority - City of San Buenaventura		X					0
116	Housing Authority of Kings County	X	X			1		1

	A	B	C	D	E	F	G	H
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 7 CARE Capitation Contractors Southern California Edison							
2	Contractor Name ^[1]	Contractor Type (Check one or more if applicable)				Enrollments ^[3]		
3		Private	CBO	WMDVBE ^[2]	LIHEAP	Rural	Urban	Total
117	Kernville Union School District		X			1		1
118	Kids Come First		X					0
119	Kings Community Action Organization	X				42		42
120	Kings County Commission on Aging Council	X	X	X				0
121	Korean CommunityServices		X					0
122	Libreria Del Pueblo, Inc.							0
123	LTSC Community Development Corporationformerly Ltle Tokyo Service Center,		X				7	7
124	Lutheran Social Services of So. Calif- Central Coast - DBA: LSS Community Ca		X					0
125	Menifee Valley Chamber of Commerce		X					0
126	Mental Health Association							0
127	Mexican American Opportunity Foundation		X				5	5
128	Mountain Communities Family Resource Center		X					0
129	New Greater Cir Mission, Inc		X					0
130	New Hope Village, Inc.		X				1	1
131	New Horizons Caregivers Group		X				2	2
132	OCCC	X					6	6
133	Operation Grace		X				1	1
134	Our Community Works		X				25	25
135	Oxnard/Port Hueneme Salvation Army	X	X					0
136	Pacific Islander Health Partnership (PIHP)		X					0
137	Pacific Pride Foundation		X					0
138	Paving the Way Foundation		X					0
139	Perris Community Partnership		X					0
140	Proteus, Inc		X					0
141	Reach Out Morongo Basin (aka Reach Out 29)		X					0
142	Community Action Partnership of Riverside County				X	9	4	13
143	Salvation Army - Santa Fe Springs		X					0
144	Salvation Army - So. Calif. Div.		X					0
145	Santa Anita Family Service		X					0
146	Senior Advocates of the Desert		X					0
147	Share Our Selves		X				3	3
148	Smiles for Seniors Found.		X					0
149	Solid Rock Christian Center - Miracle Center (SRCC/MCC)		X					0
150	Southeast Cities Service Center		X				2	2
151	Special Service for Groups/Older Adult Program		X					0
152	St John of God Health Care Services (Samaritan's Helping Hand)		X					0
153	Society of St. Vincent de Paul, St. Joseph Plecentia Conference(aka St. Vincent		X				2	2
154	Telacu Residential Mgmt, Inc	X			X			0
155	The League of California Homeowners		X					0
156	United Cambodian Community, Inc.		X					0
157	Victor Valley Comm. Services Council		X					0
158	Vietnamese Community of Orange County, Inc.		X					0
159	Volunteer Center of Greater Orange County dba OneOC		X					0
160	Volunteers of East Los Angeles		X	X			1	1
161	Total Enrollments and Expenditures					75	3,174	3,249
162								
163	^[1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.							
164	^[2] WMDVBE status based on verbal confirmation from agency. No status (blanks) applied for agencies that were unable to be reached.							
165	^[3] Numbers reflect customers that have been placed on the rate YTD. Capitation payments may lag by a month or more depending on when SCE is invoiced by the contractors.							

	A	B	C	D	E	F	G	H
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 8 CARE Participants per Month Southern California Edison							
2	2014	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration Rate	% Change ^[1]
3	January	-	-	1,324,151	1,324,151	1,499,830	88%	
4	February	-	-	1,331,639	1,331,639	1,499,830	89%	1%
5	March	-	-	1,321,633	1,321,633	1,499,830	88%	-1%
6	April	-	-	1,314,890	1,314,890	1,499,830	88%	-1%
7	May	-	-	1,312,506	1,312,506	1,499,830	88%	0%
8	June	-	-	1,319,075	1,319,075	1,499,830	88%	1%
9	July	-	-	1,321,221	1,321,221	1,499,830	88%	0%
10	August	-	-	1,322,556	1,322,556	1,499,830	88%	0%
11	September	-	-	1,333,416	1,333,416	1,499,830	89%	1%
12	October	-	-	1,329,323	1,329,323	1,499,830	89%	0%
13	November	-	-	1,321,462	1,321,462	1,499,830	88%	-1%
14	December	-	-	1,311,210	1,311,210	1,499,830	87%	-1%
15								
16	^[1] In 2014, SCE did not experience any monthly variances of 5% or more in the number of participants.							

	A	B	C	D
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 9 CARE Average Monthly Usage & Bill Southern California Edison			
2	Average Monthly Gas / Electric Usage ^[1]			
3	Residential Non-CARE vs. CARE Customers ^[3]			
4				
5	Customer	Gas Therms	Gas Therms	Total
6		Tier 1	Tier 2	
7	Non-CARE	81	4	85
8	CARE	16	1	17
9				
10	Customer	Electric KWh	Electric KWh	Total
11		Tier 1	Tier 2	
12	Non-CARE	304	276	579
13	CARE	327	197	524
14				
15				
16	Average Monthly Gas / Electric Bill			
17	Residential Non-CARE vs. CARE Customers ^[1] ^[3]			
18	(Dollars per Customer)			
19	Customer	Gas	Electric	
20	Non-CARE	\$52.98	\$107.07	
21	CARE ^[2]	\$51.08	\$58.77	
22				
23	^[1] Excludes master-meter usage.			
24	^[2] After CARE Discount.			
25	^[3] Does not include submetered customers.			

	A	B	C	D	E	F
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 10 CARE Surcharge & Revenue Southern California Edison					
2						
3	Electric					
4	CARE Surcharge and Revenue Collected by Customer Class					
5	Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
6		CARE Surcharge	Monthly Bill			
7						
8	Residential ^[1]	\$9,155,195	\$410,620,782	2.23%	\$109,862,345	27.51%
9	Agricultural	\$824,393	\$22,585,333	3.65%	\$9,892,718	2.48%
10	Commercial	\$17,840,052	\$488,264,469	3.65%	\$214,080,625	53.60%
11	Industrial	\$3,564,398	\$65,392,699	5.45%	\$42,772,770	10.71%
12	Public Authority	\$1,864,893	\$48,562,037	3.84%	\$22,378,718	5.60%
13	Railroads	\$35,301	\$1,048,400	3.37%	\$423,615	0.11%
14	Interdepartmental ^[2]	\$0	\$14,046	0.00%	\$0	0.00%
15						
16	^[1] Excludes CARE customers					
17	^[2] Electricity supplied for Edison-owned water & gas operations on Santa Catalina Island					
18						
19	Gas					
20	CARE Surcharge and Revenue Collected by Customer Class					
21	Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
22		CARE Surcharge	Monthly Bill			
23						
24	Residential	\$484.68	\$65,381.99	0.74%	\$5,816.20	35.96%
25	Commercial	\$863.15	\$119,742.09	0.72%	\$10,357.77	64.04%
26	NG Vehicle	\$0.00	\$0.00	0.00%	\$0.00	0.00%
27	Industrial	\$0.00	\$0.00	0.00%	\$0.00	0.00%

	A	B	C	D	E	F
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 11 CARE Capitation Applications Southern California Edison					
2	Entity ^[1]	Total Received	Approved	Denied	Pending/ Never Completed	Duplicate
3	ANTELOPE VLY BOYS & GIRLS CLUB	1	0	1	0	0
4	APAC SERVICE CENTER	101	60	2	0	39
5	ASIAN AMERICAN DRUG ABUSE PROG	32	26	2	0	4
6	ASIAN AMERICAN RESOURCE CENTER	10	5	0	0	5
7	ASIAN YOUTH CENTER	2	1	1	0	0
8	BEST BUY CO., INC. (111)	0	0	0	0	0
9	BEST PARTNERS	904	904	0	0	0
10	BISHOP PAIUTE TRIBE	12	11	0	0	1
11	CAP OF SAN BERNARDINO CTY	0	0	0	0	0
12	CHINESE CHRISTIAN HERALD CRUS.	19	14	0	0	5
13	CHINO NEIGHBORHOOD HOUSE	1	0	1	0	0
14	CHRIST UNITY CENTER	2	0	0	0	2
15	CITY OF BEAUMONT SENIOR CENTER	1	1	0	0	0
16	COMMUNITY PANTRY	5	0	1	0	4
17	CORONA NORCO FAMILY YMCA	8	5	2	0	1
18	COUNCIL ON AGING-ORANGE COUNTY	1	0	0	0	1
19	DESERT ARC	9	4	3	0	2
20	DESERT MANNA MINISTRIES INC	4	0	0	0	4
21	DISABLED RESOURCES CTR, INC	4	3	1	0	0
22	EL CONCILIO DEL CONDADO DE	1	1	0	0	0
23	FAMILY SVC ASSOC OF REDLANDS	5	5	0	0	0
24	FOOD SHARE	4	2	0	0	2
25	GO THE CALENDAR STOP	2,190	2,094	7	0	89
26	HELP OF OJAI, INC.	7	1	2	0	4
27	HOUSING AUTHORITY OF KINGS CO	1	1	0	0	0
28	KERNVILLE UNION SCHOOL DISTRIC	1	1	0	0	0
29	KINGS COMMUNITY ACTION ORG	42	42	0	0	0
30	LTSC COMM. DEVEL. CORP	7	7	0	0	0
31	MEXICAN AMERICAN OPPORTUNITY	21	5	5	0	11
32	MTN COMM FAM RESOURCE CNTR	1	0	0	0	1
33	NEW HOPE VILLAGE, INC	1	1	0	0	0
34	NEW HORIZONS CAREGIVERS GROUP	2	2	0	0	0
35	OCCC	13	6	1	0	6
36	OPERATION GRACE	6	1	1	0	4
37	OUR COMMUNITY WORKS	25	25	0	0	0
38	PACIFIC ISLANDER HLTH (PIHP)	1	0	0	0	1
39	RIVERSIDE DEPT COMM ACTION	159	13	13	0	133
40	SANTA ANITA FAMILY SERVICE	1	0	0	0	1
41	SHARE OUR SELVES	4	3	0	0	1
42	SOUTHEAST CITIES SERVICE CTR.	5	2	1	0	2
43	ST VINCENT DE PAUL	2	2	0	0	0
44	VOLUTNEERS OF EAST LOS ANGELES	2	1	0	0	1
45	Grand Total	3,617	3,249	44	-	324
46	^[1] Includes all entities with activity in 2014					

	A	B	C	D	E	F	G
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 12 CARE Expansion Program Southern California Edison						
2	Participating Facilities by Month						
3	2014	Gas			Electric		
4		CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
5	January	-	-	-	357	169	526
6	February	-	-	-	359	169	528
7	March	-	-	-	381	170	551
8	April	-	-	-	384	170	554
9	May	-	-	-	385	171	556
10	June	-	-	-	385	171	556
11	July	-	-	-	405	176	581
12	August	-	-	-	405	177	582
13	September	-	-	-	406	177	583
14	October	-	-	-	425	176	601
15	November	-	-	-	428	174	602
16	December	-	-	-	420	175	595
17							
18							
19	Average Monthly Gas / Electric Usage ^[1]						
20	Customer	Gas	Electric				
21		Therms	KWh				
22	Residential Facilities	N/A	918				
23	Commercial Facilities	N/A	12,443				
24							
25							
26	CARE Expansion Self-Certification and Self-Recertification Applications						
27		Received	Approved	Denied	Pending/Never Completed	Duplicates	
28	Total	260	237	23	-	-	
29	Percentage	-	91.2%	8.8%	-	-	
30							
31							
32	^[1] Excludes master meter usage.						

	A	B	C	D	E	F	G	H	I	J
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 13 CARE High Usage Verification Results Southern California Edison									
2	Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring ^[6]		
3	Households Requested to Verify ^[5]	Removed (No Response)	Removed (Verified Ineligible) ^[1]	Income Verified and Referred to ESA	Failed and Removed ^[2]	Ineligible ^[3]	Completed	Removed ^[4]	Appeals Denied	Appeals Approved
4	37,996	34,010	864	1,770	727	164	879	146	34	19
5										
6										
7	^[1] Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA.									
8	^[2] Includes customers who declined to participate in ESA, failed to respond to appointment requests, or missed multiple appointments.									
9	^[3] Includes customers who previously participated, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.									
10	^[4] Customers removed for exceeding 600% of baseline in any monthly billing cycle.									
11	^[5] During 2014, 1,352 verification request were cancelled or remain pending.									
12	^[6] SCE received 62 appeals in 2014. Nine of the appeals are pending.									

	A	B
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 14 Categorical Enrollment Southern California Edison	
2	Type of Enrollment	Number of customers Enrolled ^[1]
3	Bureau of Indian Affairs General Assistance	213
4	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	58,716
5	CalWORKs/Temporary Assistance for Needy Families (TANF)	
6	Head Start Income Eligible - (Tribal Only)	770
7	Healthy Families A&B	12,928
8	Low-income Home Energy Assistance Program (LIHEAP)	1,139
9	Medicaid/Medi-Cal	106,228
10	National School Lunch Program (NSLP) - Free Lunch	34,632
11	Supplemental Security Income (SSI)	23,669
12	Tribal TANF	9,401
13	VRU - State Programs	198
14	Women, Infants, and Children Program (WIC)	37,766
15		
16	[1] Number of customers enrolled reflects categorical programs selected by customer. Please note in some case customer select more than one eligible program for a single account.	

	A	B	C	D	E
1	PY 2014 Energy Savings Assistance and CARE Programs Annual Report CARE Table 15 Verification and Initial Enrollment 2012 Southern California Edison				
2					
3	2012 Successful Verifications - Initial Enrollment				
4	Enrollment Channel	Eligibility			
5		Categorical	Income	Unknown [1]	Total
6	Initial Enrollment Channel Unavailable	1,045		8,100	9,145
7	Call Center - Internet Enrollment	2,323	1,880		4,203
8	Call Center - Application Mailed to Customer	2,042	1,223	1	3,266
9	Customer Internet Enrollment	1,703	1,867		3,570
10	Direct Mail (mail application annually to non-CARE customers)	1,141	1,035	2	2,178
11	External Data Share (Energy & Water IOUs)	227	29	2,535	2,791
12	General Outreach (e.g., community events)	1,162	969	11	2,142
13	Internal Data Share (e.g., ESA, Energy Assistance Fund [EAF])	13	5	55	73
14	Recertification	9,395	7,001	19	16,415
15	Verification	45	29	21	95
16	Total	19,096	14,038	10,744	43,878
17					
18	2012 De-enrolled and Ineligible Verifications - Initial Enrollment				
19	Enrollment Channel	Eligibility			
20		Categorical	Income	Unknown [1]	Total
21	Initial Enrollment Channel Unavailable	611		5,317	5,928
22	Call Center - Internet Enrollment	1,754	1,525		3,279
23	Call Center - Application Mailed to Customer	1,309	831	1	2,141
24	Customer Internet Enrollment	1,172	1,382		2,554
25	Direct Mail (mail application annually to non-CARE customers)	746	684	1	1,431
26	External Data Share (Energy & Water IOUs)	138	19	1,997	2,154
27	General Outreach (e.g., community events)	833	712	7	1,552
28	Internal Data Share (e.g., ESA, Energy Assistance Fund [EAF])	10	4	46	60
29	Recertification	5,138	4,386	8	9,532
30	Verification	7	12		19
31	Total	11,718	9,555	7,377	28,650
32					
33	[1] Eligibility basis often is unknown when enrollment occurs through data sharing				

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

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

Attachment B

SCE's FERA Program Annual Report for Program Year 2014



**SOUTHERN CALIFORNIA EDISON COMPANY'S (U-338 E)
REPORT FOR THE FAMILY ELECTRIC RATE ASSISTANCE (FERA) PROGRAM FOR
THE PERIOD JANUARY - DECEMBER 2014**

May 1, 2015

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

January 1, 2014 through December 31, 2014

I. Participant Information

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

See Table 1.

Table 1		
2014	FERA Enrolled	FERA Receiving Tier 3 Benefit
January	25,549	16,522
February	25,492	13,317
March	25,670	13,156
April	25,480	13,713
May	25,364	15,305
June	25,068	15,740
July	24,685	16,638
August	24,700	17,643
September	24,352	17,680
October	23,627	16,493
November	23,044	11,453
December	22,557	13,348

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

See Table 2.

Table 2			
FERA Penetration Rate			
2014 Quarter Ending	FERA-Eligible Households	FERA- Participating Households	FERA Household Penetration Rate¹
March 31	211,625	25,670	12.1%
June 30	211,625	25,068	11.8%
September 30	211,625	24,352	11.5%
December 31	211,625	22,557	10.7%

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

SCE used the joint energy utility methodology for the CARE program that was adopted by the California Public Utilities Commission (Commission) in Decision D.01-03-028 for developing FERA penetration estimates for 2014.

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

As described in the CARE Annual Report the data were used to provide household size and income distributions as a basis for the eligibility estimates used in 2014. This CARE methodology estimates a

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

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

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

As of December 31, 2014, there were 101 sub-metered tenants participating in FERA

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

SCE did not encounter any problems administering the sub-metered FERA program during 2014.

II. Program Costs

A. Discount Cost

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

The average monthly FERA discount received, in dollars per FERA customer was \$12.29.²

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

The cumulative annual discount for all FERA customers was \$3,638,336.11.³

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

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

B. Administrative Cost

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

See Table 4.

Table 4	
FERA Program Administrative Costs by Category and Benefits	
Category	Cost
Outreach/Marketing	\$ 16,708
Processing, Certification, Recertification ^[1]	\$ -
Post Enrollment Verification ^[1]	\$ -
General Administration ^[1]	\$ -
Information Technology	\$ 36,076
Capitation	\$ 1,798
TOTAL PROGRAM COSTS	\$ 54,582
CUSTOMER BENEFITS	\$ 3,638,336
TOTAL PROGRAM COSTS & CUSTOMER BENEFITS	\$ 3,692,918

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

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

See table below.

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

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

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

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

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

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

III. Outreach

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

SCE's goal is to enroll as many eligible customers as are willing to participate on FERA. FERA enrollment decreased from 25,578 on December 31, 2013, to 22,557 on December 31, 2014, which represents a net decrease of 3,021 households.

FERA outreach was conducted as an adjunct to CARE outreach from January through December 2014 as follows:

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

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

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

Throughout 2014, SCE hosted five "Helping our Customers Succeed" Community Forums targeting the Latino, African American, Native American, and Pacific Islander populations. These Forums provide a wealth of information on programs and services, including CARE/FERA and Energy Savings Assistance Program, available to customers, businesses, and non-profit organizations. This strategy builds program awareness at a grassroots and community level where many income-qualified households may connect.

Date	Location
February 27, 2014	Highland
March 30, 2014	Santa Barbara
July 12, 2014	Moreno Valley
September 19, 2014	Garden Grove
October 17, 2014	Long Beach

In 2014, SCE participated in more than 150 community events targeting customers seeking information on bill payment and assistance through rate assistance and energy savings. At events including, but not limited to, Black History Month celebrations, World Ag Expo, senior and faith-based community events, Southern California Edison Lamp Exchanges, Earth Day festivals, winter festivals, and the Los Angeles County Fair, more than 20,000 customers received information on CARE/FERA and Energy Savings Assistance Program as ways to help lower their energy usage and ultimately their electric bill.

CHANGES

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

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

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

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

Based on the program administrator's monthly reports, CHANGES completed the following activities for SCE (January-December 2014):

SCE's FERA Report
January 1, 2014 – December 31, 2014

Component (in language)	Activity
Community Events:	
Chinese Japanese Khmer Korean Spanish Tagalog Vietnamese	CBOs did outreach and distributed materials at 33 local community events serving 13,840 customers.
Media:	
<u>Television</u> <u>Dari</u>	Zarin TV (No. reached: 1000,000)
<u>Radio</u> Chinese Vietnamese	Heavenly Rainbow AM1430 (No. Reached: 3000,000) Bolsa Radio (No. Reached: 50,000)
<u>Print</u> ⁴ Spanish (No. Reached: 467,000) Chinese (No. Reached: 150,000) Korean (No. Reached: 99,000) English (No. Reached: 96,500) Tagalog (No. Reached: 50,000) Japanese (No. Reached: 25,000) Vietnamese (No. Reached: 10,000)	Asian Journal Chinese Christian Herald Crusades El Clasificado Korea Daily Korea Times LA Midweek Asian Journal RafuShimpo Tribune U.S.A. The U.S. Asian Report Viet American Weekly Weekend Balita
Consumer Education: By Topic⁵	

⁴ This information was retrieved from the monthly data report that the CHANGES program administrator, Self Help for the Elderly (SHE) submits to SCE. While compiling data for the CARE Annual Report, SCE noticed discrepancies in SHE's month report where April YTD total media reach was 195,000, but in May, despite showing zero media outreach that month, the YTD total media reach increased to 195,550. A second discrepancy was found in November SHE monthly data report where media outreach reflected Korea Daily print placement with a reach of 150,000. In December SHE corrected the Korea Daily reach from 150,000 to 70,000 and added a second print placement for Korea Times. However, the YTD total in December was not updated to reflect that correction. SCE is reporting above the corrected total with Korea Daily reach of 70,000 instead of 150,000.

⁵ The monthly total of customers educated reported by SHE does not coincide with SHE monthly data report for December 2014 YTD totals. CARE table 11 data from CARE program monthly rapid deployment reports indicate a total of 6,546 customers educated by topic and customer one on one sessions.

Arabic Armenian Bengali Cantonese English Farsi Ilokano Indonesian Japanese Khmer Korean Lao Mandarin Persian Romanian Spanish Tagalog Thai Vietnamese Visayan	CBOs provided small workshops (workshop topics include: Understanding Your Bill, Safety Tips, Level Pay Plan, Energy Conservation, CARE/FERA and Other Assistance Programs, Avoiding Disconnection, and High Energy Use) and one-to-one education with 6,546 customers.
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SCE conducted marketing to increase awareness and enrollment of the CARE/FERA programs as described below:

Marketing

- Income qualified programs and other assistance programs (CARE, FERA, ESA, Level Pay Plan and Medical Baseline) were featured in all customers' monthly electric bill 'onserts' – pre-printed newsletter-type communications – with articles providing resources to help reduce their bill.
- When both new and transferring customers begin receiving electric service through SCE they are either mailed a "Welcome" postcard or, if they provide an e-mail address, they received an electronic greeting. Through the direct mail, or via the on-line Welcome Kit at SCE.com/welcome, more than 470,000 customers learned about bill paying options, which included CARE/FERA program details and enrollment in financial assistance through Energy Assistance Fund (EAF) if necessary.

SHE monthly data report for December YTD total customers educated was 6,281. SCE is reporting above the corrected total of 6,546.

- Prior to and during the summer months, SCE undertook a Summer Readiness preparedness campaign with the goal of reminding customers about electricity conservation plus how to prepare and find information in the unlikely event of rotating outages. As part of the campaign, an 8-page Energy Guide was created. This Guide, which also targeted seniors, included useful conservation tips and relevant solutions to help manage electricity and lower energy bills during the summer months, and included information on enrolling in CARE or FERA, and participating in the ESA Program.
- As part of the CARE/FERA annual solicitation process in June 2014, SCE included CARE/FERA enrollment applications in the bills of nearly 3 million customers receiving a paper bill (not receiving bills on-line). Because of this effort, nearly 231 new households began receiving the FERA rate discount.
- To continue to ensure that customers have every opportunity to learn about and participate in CARE or FERA, SCE's Home Energy Efficiency Survey energy usage report includes information about the CARE and FERA programs.
- FERA enrollment is coordinated with other low-income programs such as ESA, LIHEAP, SoCalGas and certain water utilities. In 2014, 16 eligible customers were enrolled in FERA through the data sharing with LIHEAP, ESA, SoCalGas, water utilities and SCE's EAF Program.
- SCE developed a 1-page fact sheet for income-qualified customers to inform them about resources and programs to help with energy costs, as well as services offered by government agencies to provide economic relief. The Community Resource Guide was made versioned for to customers across in multiple languages (Spanish, Korean, Chinese, Vietnamese, Cambodian, Tagalog) and specific audiences (seniors, Native American), and is used at community events and for local outreach.

Social Media

- Social media for Income Qualified Programs in Q4 via Facebook to increase awareness and participation in

CARE/FERA and ESA, targeting customers ages 18-65 with a HHI < \$75K .

- Delivered ads on mobile devices in line with behavioral trends among low-income and ethnically diverse customers.
- Developed a Tumblr post with program information, driving audience to sce.com for more information
- In total, there were more than:
 - More than 2.8 million impressions
 - Nearly 24,000 website clicks
 - 275 Page Likes
 - 1,851,000 Social Impressions
 - 2,230 Post “Likes”
 - 623 “Shares”;
 - 170 “Comments”

Paid Media (Advertising)

The CARE/ESAP/FERA advertising campaign consisted of desktop display, mobile display and SEM media. The SEM campaign reached all customers throughout the SCE service territory. SEM delivered 676,461 impressions, 5,710 clicks and a 0.84% click-through rate (CTR). Desktop display and mobile placements were targeted to African-American, Asian, Hispanic and Native American ethnic segments. The desktop display and mobile display campaigns delivered a total of 12 million impressions and 38,000 clicks.

African-American

Advertising was delivered to the African American community October through December 2014 with targeted on-line media placements. African American media delivered a total of 1,613,622 impressions and generated a CTR of 0.31%

On-line

On-line advertising was placed through Maxpoint, a top performing ad-network used on SCE campaigns. Desktop display delivered 1,027,154 impressions and a CTR of 0.20%. Mobile placements delivered 586,468 impressions and a CTR of 0.50%. 4,218 visits to the site can be attributed to the on-line advertising campaign.

A brief summary of total audience reach is as follows:

Total On-line Impressions 1,613,622

Native-American

Advertising was delivered to the Native American community October through December 2014 with targeted on-line media placements. Native American media delivered a total of 164,294 impressions and generated a CTR of 0.35%

On-line

On-line advertising was placed through Maxpoint, a top performing ad-network used on SCE campaigns. Desktop display delivered 104,595 impressions and a CTR of 0.23%. Mobile placements delivered 59,699 impressions and a CTR of 0.55%. 485 visits to the site can be attributed to the on-line advertising campaign.

A brief summary of total audience reach is as follows:

Total On-line Impressions 164,294

Asian

The Advertising campaign ran October through December 2014 and included targeted digital and print media. Asian media delivered a total of 3,047,701 impressions. Digital placements were delivered in-language to Cambodian, Chinese, Filipino, Korean and Vietnamese audiences. A mix of Chinese, Korean, Vietnamese and Filipino publications was used.

Print

Information about SCE's CARE/ESAP/FERA programs was conveyed in different Asian market publications including World Journal, Sing Tao, Korea Times, Korea Daily, Nguoi Viet, Viet Bao, Weekend Balita, Asian Journal and California Journal.

- Total Insertions: 32
- Total Impressions: 1,748,914

On-line

On-line advertising was placed through Maxpoint, a top performing ad-network used on SCE campaigns. Desktop display delivered 826,384 impressions and a CTR of 0.20%. Mobile placements delivered 472,403 impressions and a CTR of 0.54%. 3,623 visits to the site can be attributed to the on-line advertising campaign.

- Total Impressions: 1,298,787
- Total Clicks: 4,262

A brief summary of total audience reach is as follows:

Total Print Impressions 1,748,914
Total On-line 1,298,787
Total Audience Reach 3,047,701

Hispanic

Advertising was delivered to the Hispanic community October through December 2014 with targeted on-line media placements. Hispanic media delivered a total of 9,191,411 impressions and generated a CTR of 0.31%

On-line

On-line advertising was placed through Maxpoint, a top performing ad-network used on SCE campaigns. Desktop display delivered 5,848,281 impressions and a CTR of 0.20%. Mobile placements delivered 3,343,130 impressions and a CTR of 0.52%. 24,446 visits to the site can be attributed to the on-line advertising campaign.

A brief summary of total audience reach is as follows:

Total On-line Impressions 164,294

Earned Media (PR and Outreach)

In 2014, SCE issued a news release ("New Income Limits May Help More SCE Customers Qualify for Utility Bill Discounts") and an on-line newsroom story ("CARE and FERA Programs Help Qualified Customers in Need") as part of its earned media activities.

Summary of earned media:

Market	Audience Reach
African American	384,175
Asian	8,788,741
Hispanic	817,540
Total Earned Media Audience Reach	9,990,456

African-American

In 2014, 15 earned media placements were generated about CARE and FERA within the African-American community, which generated a total of 384,175 print, on-line and social media impressions.

Print

Information about SCE's money saving programs were published in a number of publications resulting in seven print media placements: California Crusader News (2 placements, Metro), Tri-County Sentry (Northern), San Bernardino American News (Eastern), Inland Valley News (Southern), Long Beach Times (Metro) and Westside Story Newspaper (Eastern).

Total Earned Placements: 7
 Total Circulations: 104,000
 Total Print Impressions: 364,000

On-line

Five media placements were highlighted on tricountysentry.com, calcrusnews.com, ourweekly.com and westsidestorynewspaper.com.

Total Earned Placements: 5
 Total On-line Impressions: 17,000

Social media

Reaching more than 3,000 friends, the Carson Southbay News and Westside Story shared the information on Facebook, while the Tri-County Sentry shared it on Twitter.

Total Earned Placements: 3
 Total On-line Impressions: 3,175

A brief summary of total audience reach is as follows:

Total Print Impressions 364,000
 Total On-line 17,000
 Total Social Media 3,175
Total Audience Reach 384,175

Media Placements – African-American Media

Media Outlet	Media Type	Publication/Air Date	Impressions
Carson Southbay News Facebook	Social Media	6/3/2014	2,556
calcrusnews.com	On-line	6/5/2014	1,500
California Crusader	Print	6/5/2014	84,000
San Bernardino American News	Print	6/12/2014	35,000
Tri County Sentry	Print	6/12/2014	35,000
Tri County Sentry Twitter	Social Media	6/12/2014	39
tricountysentry.com	On-line	6/12/2014	1,500
calcrusnews.com	On-line	6/19/2014	1,500
California Crusader	Print	6/19/2014	84,000
Inland Valley News	Print	7/3/2014	64,750

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WestSide Story Facebook	Social Media	7/3/2014	580
Westside Story Newspaper	Print	7/3/2014	26,250
westsidestorynewspaper.com	On-line	7/3/2014	1,500
ourweekly.com	On-line	7/17/2014	11,000
Long Beach Times	Print	7/31/2014	35,000
TOTAL			384,175

***California Crusader News ran the article twice.**

Asian

In 2014, 37 earned media placements covering CARE/FERA, Energy Savings Assistance (ESA), and Energy Assistance Fund (EAF) programs within the Asian community totaled 8,788,741 impressions.

The “New Income Limits May Help More SCE Customers Qualify for Utility Bill Discounts” press release garnered media coverage on the topic of CARE/FERA during the months of June and July of 2014. These stories based on the press release were covered in Chinese, Filipino, Korean, Thai and Vietnamese media. Other media-initiated stories not based on the press release but which included general information or mentions about Energy Savings Assistance (ESA), Energy Assistance Fund (EAF), or CARE/FERA for low-income customers were published by the following outlets: Korea Times, World Journal, and Sing Tao Daily.

Print

Information about SCE’s CARE/FERA, ESA, and/or EAF programs were conveyed in different Asian market publications including Korea Herald Biz, International Daily News, World Journal, US Asian Post, Viet Bao Daily News, Philippine Tribune, Siam Media, Chinese Biz News, Saigon Times, Korea Times, and Sing Tao Daily.

- Total Earned Placements: 13
- Total Impressions: 2,147,600

Television

LA 18 Korean, New Tang Dynasty, CTI-TV, and TVB-USA discussed the CARE/FERA programs on-air. TVB-USA interviewed a spokesperson on the CARE/FERA programs.

- Total Earned Placements: 5
- Total Impressions: 1,832,900

On-line

On-line sites, print publications and TV outlets, including but not limited to, Korea Daily, Asian Journal, and chineseinla.com, also posted stories on-line.

- Total Earned Placements: 18
- Total Impressions: 4,807,445

Social Media

One broadcast station, LA 18 Korean, shared their coverage with their subscribers on YouTube.

- Total Earned Placements: 1
- Total Impressions: 796

A brief summary of total audience reach is as follows:

Total Print Impressions	2,147,600
Total Broadcast	1,832,900
Total On-line	4,807,445
Social Media	796
Total Audience Reach	8,788,741

Media Placements – Asian Media

Media Outlet	Media Type	Market	Publication / Air Date	Impressions
Sing Tao Daily	Print	Chinese	6/1/14	105,000
Asian Journal	On-line	Filipino	6/2/14	28,910
Korea Herald Biz	On-line	Korean	6/2/14	6,500
LA 18 Korean	TV	Korean	6/2/14	250,000
LA 18 Korean	Social Media/ Youtube	Korean	6/2/14	796
New Tang Dynasty TV	TV	Chinese	6/2/14	500,000
ChannelGE.com	On-line	Chinese	6/3/14	2,100
ChineseinLA.com	On-line	Chinese	6/3/14	13,041
International Daily News	Print	Chinese	6/3/14	84,000
International Daily News	On-line	Chinese	6/3/14	18,877
Korean Herald Biz	Print	Korean	6/3/14	140,000
New Tang Dynasty TV	On-line	Chinese	6/3/14	270,597
World Journal	On-line	Chinese	6/3/14	980,082
World Journal	Print	Chinese	6/3/14	350,000
CTI-TV	On-line	Chinese	6/4/14	1,661,357
CTI-TV (1st airing)	TV	Chinese	6/4/14	500,000
US Asian Post	On-line	Filipino	6/4/14	1,529
US Asian Post	Print	Filipino	6/4/14	157,500

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Viet Bao Daily News	On-line	Vietnamese	6/4/14	76,067
Viet Bao Daily News	Print	Vietnamese	6/4/14	87,500
CTI-TV (2nd airing)	TV	Chinese	6/5/14	500,000
Philippine Tribune	On-line	Filipino	6/5/14	N/A
Philippine Tribune	Print	Filipino	6/5/14	105,000
Siam Media	On-line	Thai	6/6/14	N/A
Siam Media	Print	Thai	6/6/14	52,500
Chinese Biz News	Print	Chinese	6/7/14	105,000
HuaRenDianPing.com	On-line	Chinese	6/7/14	1,867
Korea Daily	On-line	Korean	6/9/14	300,000
Saigon Times	Print	Vietnamese	6/13/14	70,000
TVB-USA	TV	Chinese	7/9/14	82,900
TVB-USA	On-line	Chinese	7/10/14	14,840
World Journal	On-line	Chinese	11/7/14	980,082
World Journal	Print	Chinese	11/7/14	350,000
Korea Times	On-line	Korean	11/15/14	225,798
Korea Times	Print	Korean	11/15/14	270,550
Korea Times	On-line	Korean	11/22/14	225,798
Korea Times	Print	Korean	11/22/14	270,550
Total				8,788,741

Summary Table:

PRINT MEDIA	IMPRESSIONS	PLACEMENTS
Chinese	994,000	5
Filipino	262,500	2
Korean	681,100	3
Thai	52,500	1
Vietnamese	157,500	2
TOTAL	2,147,600	13

TV MEDIA	IMPRESSIONS	PLACEMENTS
Chinese	1,582,900	4
Korean	250,000	1
TOTAL	1,832,900	5

ON-LINE MEDIA	IMPRESSIONS	PLACEMENTS
Chinese	3,942,843	9
Filipino	30,439	3
Korean	758,096	4
Thai	N/A	1
Vietnamese	76,067	1
TOTAL	4,807,445	18

SOCIAL MEDIA	IMPRESSIONS	PLACEMENTS
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Korean	796	1
TOTAL	796	1

TOTAL PLACEMENTS 37
TOTAL IMPRESSIONS 8,788,741

Hispanic

In 2014, 10 earned media placements (9 CARE/FERA, and 1 ESA) programs within the Hispanic community totaled 817,540 earned media impressions.

Print

Information about SCE's CARE/FERA programs were conveyed in three publications including: Miniondas (circ. 45,000); Azteca News (circ. 42,000); and El Panamericano (circ. 25,000)

- Total Earned Placements: 3
- Total Circulation: 112,000
- Total Impressions: 392,000

Television

Two CARE/FERA interviews were conducted in Los Angeles' morning and evening newscast with KVEA-TV Telemundo Channel 52 (viewership 29,159) and one ESA newscast was conducted with KMEX-TV Univision Channel 34 (viewership 123,511).

- Total Earned Hits: 3
- Total Viewership: 152,670

On-line

Four publications posted information about CARE/FERA on-line: El Clasificado (250,000); El Panamericano (2,500); Long Beach al Dia (300) and KVEA-TV (On-line = 20,070)

- Total Earned On-line Hits: 4
- Total On-line Visitors: 272,870

A brief summary of Hispanic total audience reach is as follows:

Total Print Impressions	392,000
Total On-line	272,870
Total Broadcast	152,670
Total Audience Reach	817,540

Media Placements – Hispanic Media

Media Outlet	Media Type	Publication/Air Date	Impressions
KMEX-TV Univisión 34 "Noticias 34" 6:00 p.m.	Television	5/19/2014	123,511

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Miniondas	Print	6/5/2014	157,500
Long Beach Al Dia	On-line	6/6/2014	300
Azteca News	Print	6/11/2014	147,000
KVEA-TV Telemundo 52 "Buenos Días Los Angeles" 5:00 a.m.	Television	6/12/2014	3,159
KVEA-TV Telemundo 52 "Noticiero 52-A las 11p.m."	Television	6/12/2014	26,000
Telemundo 52 (On-line)	On-line	6/12/2014	20,070
El Clasificado	On-line	6/16/2014	250,000
El Panamericano	Print	7/1/2014	87,500
El Panamericano	On-line	7/1/2014	2,500
TOTAL			817,540

General Market

In 2014, 4 earned media placements were generated about CARE and FERA in general market media, totaling 1,257,550 media impressions.

Media Outlet	Media Type	Publication/Air Date	Impressions
4 Traders	On-line	6/2/2014	628,775
Fullerton Chamber	On-line	6/3/2014	628,775
New Fullerton	On-line	6/3/2014	N/A
Orange County for US	On-line	6/3/2014	N/A
TOTAL			1,257,550

B. Discuss each of the following:

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

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

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

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

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

IV. Processing FERA Applications

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

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

See Table 5.

TABLE 5						
FERA Self-Certification and Self-Recertification Applications ⁶						
	Provided ⁷	Received	Approved	Denied ⁸	Pending/Never Completed ⁹	Duplicates
Utility		15,472	6,869	3,859	4,558	181
Capitation		75	75	-	-	-
Other Third-Party		14	14	-	-	-
Total		15,561	6,958	3,859	4,558	181

⁶ Includes sub-metered tenants.

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

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

⁹ Includes cancelled recertification requests and closed accounts.

B. Processing Random Post-Enrollment Verification Requests

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

See Table 6.

TABLE 6 ¹⁰						
FERA Random Post-Enrollment Verification Requests ¹¹						
	Requested	Received	Approved	Denied	Pending/Never Completed ¹²	Duplicates
Total	1,455	1,391	59	173	1,159	0

V. Program Management

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

There were no issues or events that significantly affected FERA program management in PY2014.

¹⁰ SCE is investigating its verification system to determine if it is functioning properly based on the small number of verification requests shown in Table 6.

¹¹ Verification process for FERA is the same as CARE.

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