



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

May 1, 2016

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

January 1, 2015 through December 31, 2015

I. Participant Information

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

See Table 1.

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

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

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

See Table 2.

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

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

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

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

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

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

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

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

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

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

II. Program Costs

A. Discount Cost

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

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

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

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

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

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

B. Administrative Cost

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

See Table 4.

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

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

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

See table below.

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

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

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

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

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

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

III. Outreach

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

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

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

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

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

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

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

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

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

CHANGES

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

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

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

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

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

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

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

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

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

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

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

Marketing

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

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

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

Social Media

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

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

Paid Media (Advertising)

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

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

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

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

General Market

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

On-line

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

A brief summary of total audience reach is as follows:

Total On-line Impressions 12,393,934

Asian

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

- **On-line**

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

- **Print**

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

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

A brief summary of total audience reach is as follows:

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

Hispanic

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

- **On-line**

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

A brief summary of total audience reach is as follows:

Total On-line Impressions	12,332,318
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Earned Media (PR and Outreach)

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

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

Other Coverage: 2

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

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

B. Discuss each of the following:

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

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

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

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

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

IV. Processing FERA Applications

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

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

See Table 5.

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

⁵ Includes sub-metered tenants.

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

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

⁸ Includes cancelled recertification requests and closed accounts.

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

B. Processing Random Post-Enrollment Verification Requests

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

See Table 6.

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

V. Program Management

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

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

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

¹⁰ Verification process for FERA is the same as CARE.

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