

**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.	)	A.11-05-017 (Filed May 16, 2011)
Application Of Southern California Gas Company (U 904-G) For Approval Of Low-Income Assistance Program And Budgets For Program Years 2012-2014.	)	A.11-05-018 (Filed May 16, 2011)
Application Of Pacific Gas And Electric Company For Approval Of The 2012-2014 Energy Savings Assistance And California Alternate Rates For Energy Programs And Budgets (U 39-M)	)	A.11-05-019 (Filed May 16, 2011)
Application Of San Diego Gas & Electric Company (U 902-M) For Approval Of Low-Income Assistance Programs And Budgets For Program Years 2012-2014	)	A.11-05-020 (Filed May 16, 2011)

**SOUTHERN CALIFORNIA EDISON COMPANY'S (U 338-E) 2014 ANNUAL REPORT  
FOR 2013 LOW INCOME PROGRAMS**

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Dated: **May 1, 2014**

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**SOUTHERN CALIFORNIA EDISON COMPANY'S (U 338-E) 2014 ANNUAL REPORT FOR 2013**  
**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 2013. The information in this report supersedes all prior reports submitted by SCE.

Respectfully submitted,

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*/s/ Andrea L. Tozer*

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**May 1, 2014**

**Attachment A**

**SCE's ESA and CARE Programs Annual Report for Program Year 2013**



SOUTHERN CALIFORNIA  
**EDISON**

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

**May 1, 2014**

2013 Energy Savings Assistance Program Summary			
2013	Authorized / Planning Assumptions	Actual	%
Budget	\$72,640,016	\$55,629,829	76.58%
Homes Treated	87,389	69,031	78.99%
kWh Saved		31,065,349	
kW Demand Reduced		12,596	
Therms Saved		N/A	

2013 CARE Program Summary			
2013	Authorized Budget	Actual	%
Administrative Expenses	\$12,256,000	\$4,727,129	39%
Subsidies	\$376,900,000	\$358,025,586	95%
Service Establishment Charge	-	-	-
<b>Total Program Costs and Discounts</b>	<b>\$389,156,000</b>	<b>\$362,752,715</b>	<b>93%</b>
<b>CARE New Enrollments</b>	<b>Automatically Enrolled via Data Sharing, ESA Participation, etc.</b>	<b>Self-Certified as Categorically Eligible</b>	<b>Self-Certified as Income Eligible</b>
Method	42,561	142,498	103,307
<b>CARE Penetration</b>	<b>Estimated Eligible Participants</b>	<b>Participants</b>	<b>Penetration Rate</b>
<b>Total Enrolled</b>	<b>1,410,534</b>	<b>1,335,607</b>	<b>94.7%</b>

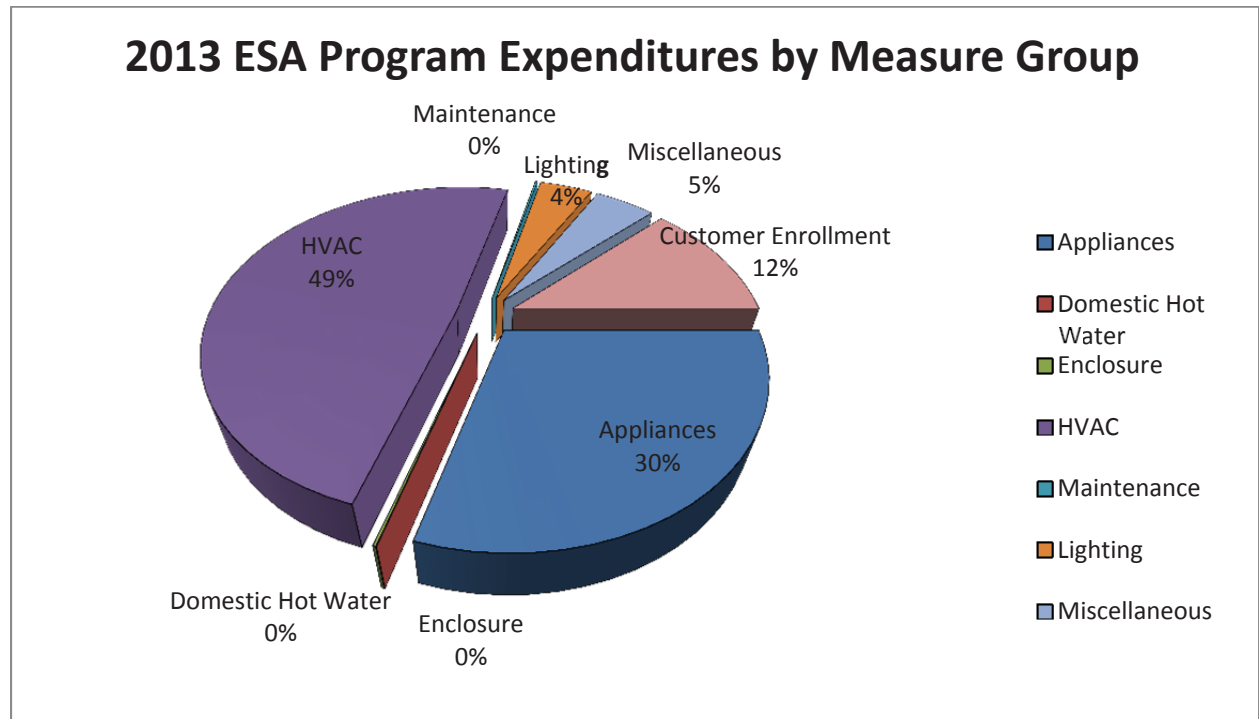


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## SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014

### 1. Energy Savings Assistance Executive Summary

*Provide an executive summary of the ESA program year:*

SCE's Energy Savings Assistance (ESA) Program helps customers conserve energy and save money. SCE provides free energy-efficient appliances and installation 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 income guidelines. Specific measures are authorized according to criteria that are observed in each home for existing appliances and feasibility of installation.

There are three stages in the program. Each stage is delivered by respected community organizations and building contractors under contract to SCE.

#### 1. Outreach & Assessment

SCE's contractors determine if customers are eligible according to the following criteria:

- All customers must provide proof of income.
- Homeowners must provide proof of ownership.
- Renters must provide the property owner's written permission.
- SCE's contractors check homes to see if the recommended products or services will work. (For example, if a recommended refrigerator will not fit in the kitchen, SCE will not install it.)

#### 2. Installation

The contractors install appliances or implement other recommendations. The CPUC requires installers to:

- Meet or exceed existing codes and regulations
- Follow accepted building practices

#### 3. Inspection

An independent contractor performs an in-home inspection to ensure the installation contractor completed the work up to standards. If the work is not done properly, it will be redone at no cost to customers.

SCE's 2013 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.



## SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014

### 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
<p><b>1.1:</b> Strengthen ESA outreach using segmentation analysis and social marketing tools.</p>	<ul style="list-style-type: none"> <li>• Implement energy education designed to help customers understand and change behaviors in ways that support ESA savings.</li> </ul>	<ul style="list-style-type: none"> <li>• 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.</li> <li>• SCE contracts with Community-Based Organizations (CBOs) with existing ties to the disabled customer segment in SCE service territory.</li> </ul>
<p><b>1.2:</b> Develop a recognizable and trustworthy Brand/Tagline for the ESA programs.</p>	<ul style="list-style-type: none"> <li>• Launch integrated EE/ESA/DSM brand.</li> </ul>	<ul style="list-style-type: none"> <li>• The Statewide ME&amp;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.</li> </ul>

**SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014**

<b>Implementation Plan and Timeline</b>		
<b>Strategies</b>	<b>Mid Term 2012 – 2014</b>	<b>IOU strategy employed this program year</b>
<p><b>1.3:</b> Improve program delivery.</p>	<ul style="list-style-type: none"> <li>• Use information from segmentation analysis to achieve efficiencies in program delivery.</li> <li>• Leverage with Local, State, and Federal agencies as well as other organizations to increase seamless coordination, efficiency and enrollment.</li> </ul>	<ul style="list-style-type: none"> <li>• In 2013, SCE continued to manage the number of jobs allocated to a contractor within a community to ensure a full day’s work could be completed and additional day trips could be avoided. This “neighborhood” approach achieves efficiencies in time and material and helps reduce the program’s carbon footprint.</li> <li>• ESA established partnerships with organizations that serve clients with limited incomes and/or special needs.</li> <li>• Schedule Manager and Routing Tool (SMART) provides proximity-based scheduling of jobs, mileage and time calculations, and route maps to and in-between appointments. The tool determines the most efficient overall route available which will decrease crew members’ windshield time, reduce operating costs, save on gas consumption, and decrease the program’s carbon footprint.</li> <li>• Customers were offered an email option for program communications to improve efficiency.</li> <li>• 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.</li> </ul>

**SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014**

<b>Implementation Plan and Timeline</b>		
<b>Strategies</b>	<b>Mid Term 2012 – 2014</b>	<b>IOU strategy employed this program year</b>
<p><b>1.4:</b> Promote the growth of a trained ESA workforce.</p>	<ul style="list-style-type: none"> <li>• Implement ESA workforce education and training.</li> <li>• Coordinate resources for training related to ESA program needs to ensure delivery of ESA-trained resources to the program.</li> </ul>	<ul style="list-style-type: none"> <li>• Four types of training were offered in 2013: home assessment training, installer and inspection 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.</li> <li>• SCE also enhanced additional workforce training content for the home assessment training course, including instruction on time management skills, communications skills, customer service skills, and safety best practices.</li> </ul>

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

<b>Implementation Plan and Timeline</b>		
<b>Strategies</b>	<b>Mid Term 2012 – 2014</b>	<b>IOU strategy employed this program year</b>
<p><b>2.1:</b> Increase collaboration and leveraging of other low-income programs and services.</p>	<ul style="list-style-type: none"> <li>• Continue to expand partnerships with stakeholders and seek new opportunities for data sharing.</li> </ul>	<ul style="list-style-type: none"> <li>• Conducted research to designate additional document types as acceptable proof of participation in other low income programs; increased applicant convenience and number of successful enrollments.</li> </ul>
<p><b>2.2:</b> Coordinate and communicate between ESA, energy efficiency and DSM programs to achieve service offerings that are seamless for the</p>	<ul style="list-style-type: none"> <li>• Continually reevaluate and update programs to take advantage of new technologies.</li> <li>• Explore in-home displays; home area networks and/or “pay-as-you-go” technology</li> </ul>	<ul style="list-style-type: none"> <li>• During delivery of ESA, and where appropriate, customers were provided information on SCE’s DSM/EE programs including the Summer Discount Program.</li> <li>• Single Family Affordable Homes (SASH) Program: SCE coordinates with the SASH</li> </ul>

**SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014**

<b>Implementation Plan and Timeline</b>		
<b>Strategies</b>	<b>Mid Term 2012 – 2014</b>	<b>IOU strategy employed this program year</b>
customer.	to assist low income customers manage their use.	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.
<b>2.3:</b> Provide low income customers with measures that result in the most savings in the ESA program.	<ul style="list-style-type: none"> <li>Assess opportunities to incorporate new energy efficiency measures into the ESA program, e.g., plug-load reduction, new HVAC technology.</li> </ul>	<ul style="list-style-type: none"> <li>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).</li> </ul>
<b>2.4:</b> Increase delivery of efficiency programs by identifying segmented concentrations of customers.	<ul style="list-style-type: none"> <li>Evaluate approach determine whether additional segments are needed.</li> </ul>	<ul style="list-style-type: none"> <li>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:</li> <li>ZIPs with high estimated ESA income eligibility</li> <li>CARE participants</li> <li>Non-ESA Program participants</li> <li>High energy users (CARE High Usage)</li> </ul>

## SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014

### 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	\$72,640,016	\$55,629,829	77%
Homes Treated <sup>[1]</sup>	87,389	69,031	79%
kWh Saved	34,538,106	31,065,349	90%
kW Demand Reduced	7,766	12,596	162%
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 2013, SCE continued to employ its ESA database 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. For example:

- In 2013, SCE deployed twelve automated and “direct connect” calling campaigns targeting over 218,900 customers in segmented “neighborhood” ZIP Code clusters. The campaigns identified those customers who may be eligible to receive ESA services and provided customers with the opportunity to directly connect with an assigned local contractor to immediately schedule an appointment for enrollment. Additionally, SCE launched its first multi-language direct connect campaign targeting over 11,400 customers within the surrounding cities of San Gabriel Valley. The newly developed multi-language script allowed for customers to select their preferred language of communication, which currently supports seven languages. (English, Spanish, Korean, Chinese/Cantonese, Vietnamese, Cambodian, and Tagalog).

## SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014

- In 2013, SCE deployed 150,000 postcards to English/Spanish speaking customers containing information about the Energy Savings Assistance Program. The postcard targeted customers within its Cooling and Non-Cooling Climate Zones encouraging customers who are already enrolled in the CARE program to take advantage of the free services available to them through the ESA Program.
- In late 2013, 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 2013 year that are currently falling under these conditions. The ESA Program began referring these customers out as potential leads to hopefully enroll them into the program and provide energy-saving services.
- Throughout the 2013 program year, SCE hosted several 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.

### *1.3.2 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.*

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 ZIP7 clusters through the use of targeted direct mail postcards, automated direct connect calling campaigns, mass mailers and e-mail blast campaigns.

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

## SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014

the funding cycle in order to distribute ESA work throughout the year for each ESA service provider.

Continued expansion of the paperless enrollment process with the use of the Tablet PC technology increased the effectiveness of Outreach by allowing mobility in door-to-door canvassing. Assessors were able to sort leads based on ZIP-7 clusters to determine the order of customers to be visited. Assessors were able to determine customer's previous participation and eligibility while in the customer's home which eliminated wasted return visits. In 2013, thirty assessors from five different service providers used the paperless enrollment process to enroll 10,829 customers.

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 WMDVBE status.

### 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 assessors and work crews maintain a full day's worth of work and minimize the program's carbon footprint.

In 2013, methods of identifying, marketing and outreaching to specific customer segments were developed through the Customer Marketing Tool within the EMAPS database. Additionally, 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 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. In 2013, ESA continued its aggressive integration and partnering efforts with 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. In addition, categorical and self-

## SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014

certification enrollment were implemented to ease the enrollment process.

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.

### 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.*

Just over one percent of the homes treated in 2013 are classified as “go backs.” These customers were identified as having received services between 1999 and 2001.

No. of Homes Treated 2013	No. of Service Accounts Treated in 2013 Previously Treated in 1999-2001	Percentage of Go Back Homes
69,031	884	1.3%

*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:

- Supplementing the traditional direct mailers to customers to include the contact information of service providers assigned to the area. By including the service provider’s contact information on the direct mailer, it legitimizes the service provider and reduces the enrollment wait time by allowing the customer to contact the service provider directly.
- Launching automated ‘direct connect’ calling campaigns allows for customers to speak in their preferred language directly to an assigned service provider.



## SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014

- 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 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 participates 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.
- 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. Implementing 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. Assessors are able 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 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.

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 its 2013 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 2014 through go-back visits and then can be classified as treated.

## SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014

### 1.5 Disability Enrollment Efforts

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

In 2013, 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, over 13,000 program brochures and senior-focused Resource Guides were distributed to over 36 senior centers throughout the San Bernardino and Riverside Counties. They included areas such as Apple Valley, Banning, Cathedral City, Colton, Corona, Crestline, Desert Hot Springs, Fontana, Highland, Lake Elsinore, Moreno Valley, Murrieta, Palm Desert, Palm Springs, Pinon Hills, Rancho Cucamonga, Riverside, San Bernardino, San Jacinto, and Upland cities. Over 4,700 customer interactions took place while disseminating valuable information to customers with special needs and seniors.

#### 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. Once a home has been identified as including a person with a disability, this information will enable assessment and installation contractors 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:*

<b>Disability Enrollments</b>			
<b>Source</b>	<b>Total Enrollments</b>	<b>Disability Enrollments</b>	<b>% of Disability Enrollment</b>
SCE Referral	18,486	3,453	19%
Joint Utility	43,533	4,261	10%
Outreach	7,012	887	13%
Total	69,031	8,601	12%
Target Enrollment Rate			15%

## SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014

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

In 2013, SCE continued to implement marketing and outreach tactics targeting customers with disabilities in an effort to reach the 15% target. Although the combined overall target was not reached, SCE Referrals achieved results above the 15% target whereas Joint Utility efforts fell short. While the 15% target was not documented based on field observations, SCE may have met the 15% participation goal if individuals with disabilities were not accurately self-reported. SCE believes some treated homes may have included members with disabilities that were not classified as such because of the challenge posed by Decision 08-11-031, Section 7.1, paragraph 3 (page 68), which states “The IOUs should not ask customers if they are disabled, but instead allow customers with disabilities to voluntarily self-identify.” If the household member with a disability is not present during the enrollment, it is difficult for the service provider to identify whether a household member has a disability. SCE will continue to make every effort to achieve the 15% target by implementing new marketing and outreach tactics targeting customers with disabilities and establishing new alliances with organizations offering services to low-income clients with a disability.

Data collected in the recently completed Needs Assessment Study<sup>1</sup> supports participation results that are considerably higher than what SCE is able to ascertain via its program tracking data for reasons noted above. Unlike the IOUs over the course of implementing the program, the survey employed via the Needs Assessment included a battery of questions that asked respondents if they or any member of their household had a disability. Based on the survey results, the study reports that 63% of the homes treated by ESA (statewide) include at least one household member who is reportedly disabled.<sup>2</sup> Although the report does not provide comparable IOU specific results on consolidated data from multiple questions, data shown in the report appendices show that 35% of the SCE program participants claim to have a household member that is unable to work because of a Physical, Mental, or Emotional Disability.<sup>3</sup> Based on these findings, it is likely

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<sup>1</sup> Needs Assessment for the Energy Savings Assistance and the California Alternate Rates for Energy Programs. *Volumes, 1, 2 & 3. December 2013.*

<sup>2</sup> Volume 1. P. 3-26.

<sup>3</sup> Volume 3. P. 8-247.

## SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014

that a more accurate disability enrollment figure for SCE is 35% or higher.

### 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.

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.

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SCE also contracts with agencies that serve other IOU ESA programs. Contracting with the same service providers allows the IOUs to split the cost of jointly educating the customer on energy efficiency practices and resources. This leveraging has been highly successful in the large number of jointly treated households, and can help reduce denial of energy education or other measures to homes due to 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.

- 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.

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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.

SCE continues to use the customers enrolled on CARE as one of, and typically the main, customer segmentation criteria for targeted ESA marketing. In 2013, SCE continued to employ Automated Outbound Calling, where CARE customers receive an automated outbound call that asks a few basic ESA eligibility questions. This effort creates ESA leads which are batched by ZIP code and automatically routed by EMAPS to ESA contractors to schedule in-home enrollment appointments. Additionally, "direct connect" is a feature of Outbound Calling that directly connects customers with assigned local contractors to immediately schedule an appointment for enrollment.

In addition, the ESA and CARE marketing plans are jointly coordinated to integrate efforts 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.

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

SCE continued the integration work initiated by the Program Integration Team consisting of members of ESA, CARE, and other Residential Energy Efficiency program groups. As part of this coordinated effort, ESA and CARE staffs ensure that appropriate low income messaging is included in customer materials between Residential Energy Efficiency and ESA program. SCE has coordinated with the Middle Direct Install (MIDI) Program, Energy Upgrade California Multifamily pilot program, and the Multifamily Energy Efficiency Rebate Program. 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.

Examples of these efforts include:

- On August 21<sup>st</sup>, SCE coordinated with South Coast Air Quality Management District (AMQD), The City of Desert Hot Springs, Southern California Gas Company, and SCE Local Public Affairs to strategically bring awareness and participation to local residents and to receive services through ESA by hosting an Energy Efficiency Weatherization Workshop. The event hosted two workshops where customers had an opportunity to learn about the various program options available from both utilities, and AMQD.
- On December 4th, SCE presented program benefits related to ESA, CARE, Energy Assistance Fund, and Medical Baseline during a quarterly meeting with Community Development Commission

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(CDC) of the County of Los Angeles. In attendance were representatives from over 20 cities across the County of Los Angeles.

- On December 19<sup>th</sup>, SCE presented program benefits related to ESA, CARE, EAF, and Medical Baseline during a meeting with Community Development Commission (CDC) of the County of Los Angeles and the First 5 LA collaborative. In attendance were representatives from various cities across the County of Los Angeles.

### *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, ESA Program educational and marketing materials continue to contain information on the central A/C remote switching device for the Residential Demand Response Program Summer Discount Plan (SDP).

### *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 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*



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*and train low income workers and how such efforts differ from prior program years.*

The ESA program provides training on different aspects of the program to contractors, CBOs and vendors working in the program. Contractors and CBOs are required to maintain a license in good standing with the California State Licensing Board (CSLB).

The training curriculum includes workshops related to the policies and procedures for home enrollment and assessment, service delivery and inspections. 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. During 2013, as the result of feedback received from assessors who had previously attended an assessment training workshop and from service providers working in the ESA Program, additional emphasis was placed on the Energy Education component of the workshop. 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.

In addition, web seminars (“webinars”) have been implemented as a low-cost alternative to face-to-face meetings. Since the use of webinars reduces the overhead and travel costs typically associated with face-to-face meetings and can be scheduled almost immediately, plans are being developed to expand the use of this method to other program components wherever appropriate. In 2013, the webinars were used to provide training on policy or procedural changes.

The CBT Learning system was also re-introduced to allow employees of ESA Program service providers to enroll in free on-line software training. 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 2013, 69 users enrolled in the system.

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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 over 600 jobs that support the ESA program. This figure includes employees of service providers performing ancillary services (e.g., janitorial and clerical) but may not be a comprehensive list. 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.
- Installer and Inspection Training – Offered to new inspectors being certified to verify that the ESA service providers' work was performed properly and measures installed safely.
- 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.

<b>Type of training or recruitment conducted</b>	<b>Employees trained</b>	<b>Employees hired</b>
Home Assessment Training	184	114
Installer and Inspection Training	78	0
Computer Skills Training	69	0

## 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. As part of the procurement process, the lighting supplier was evaluated on the availability of product and ability to communicate if shortages should occur.

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 adequately 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

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warehousing. The ESA program agreement requires the supplier to maintain at least 30 days of product for all service providers and deliver product to the service providers' facilities within 14 days from the order date.

### 1.10 Studies

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

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. 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.

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**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**

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.

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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 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.

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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 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

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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 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](http://www.energydataweb.com) as well as [www.calmac.org](http://www.calmac.org). Budgets spent compared to authorized budgets are included in Table 1.10.3.

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

Study	Lead Consultant	Managing Utility	Budget Authorized <sup>4</sup>	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	\$217,194.50 <sup>5</sup>	72%
Low Income Needs Assessment Study	Evergreen Economics	SCE	\$700,000	\$699,997.00	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 2013.

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<sup>4</sup> 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%.

<sup>5</sup> 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.

#### 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.–*

<b>TABLE 1</b>		
<b>Residential CARE Program</b>		
<b>Customers by Month</b>		
<b>(electric usage)</b>		
<b>2013</b>	<b>CARE Customers</b>	<b>Percentage Change</b>
January	1,395,782	0%
February	1,390,302	0%
March	1,384,965	0%
April	1,374,630	-1%
May	1,365,785	-1%
June	1,356,467	-1%
July	1,351,239	0%
August	1,349,758	0%
September	1,345,474	0%
October	1,330,776	-1%
November	1,316,304	-1%
December	1,335,607	+1%

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

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### *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 2013. This method entails annual estimation of eligibility for CARE, ESA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

The most recent important change affecting the eligibility estimates was the CPUC's adoption of Federal Poverty Guidelines (FPG) as the source for income limits. This included decoupling one and two person household income limits, leading to a drop in eligibility relative to the previous limits, which used a common income limit for both one and two person households. The decoupling remained in effect throughout 2013, but one and two person limits will be recoupled in the future due to enactment of AB 327 in October 2013.

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

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individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility.

In 2009, the method was augmented to better incorporate the impact of labor force changes (unemployment and other forms of job separation, as well as positive changes that are expected to occur in California subsequent to the recession). The method adjusted block group marginal distributions on household income based on sub-state modeling that incorporated Current Population Survey, Integrated 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.

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### *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 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 .328.

### *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 68,879.

### *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 35,657.

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*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 51.8.

*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)	\$2,100,000	\$1,656,337	78.9%
Processing, Certification, Recertification	\$4,553,000	\$777,585	17.1%
Post Enrollment Verification	\$3,456,000	\$484,391	14.0%
Information Tech./Programming	\$950,000	\$735,458	77.4%
Pilots <sup>[3]</sup>	-	\$154,766	-
Measurement and Evaluation	\$90,000	\$167,918	186.6%
Regulatory Compliance	\$265,000	\$202,368	76.4%
General Administration	\$702,000	\$548,305	78.1%
CPUC Energy Division Staff	\$140,000	\$0	0.0%
Cooling Centers <sup>[1]</sup>	N/A	N/A	N/A
<b>Total Expenses</b>	<b>\$12,256,000</b>	<b>\$4,727,129</b>	<b>38.6%</b>
Subsidies and Benefits <sup>[2]</sup> <sup>[3]</sup>	\$376,900,000	\$358,025,586	95.0%
<b>Total Program Costs and Discounts</b>	<b>\$389,156,000</b>	<b>\$362,752,715</b>	<b>93.2%</b>

<sup>[1]</sup> SCE's authorized Cool Center budget is not part of the CARE budget.

<sup>[2]</sup> Subsidies and benefits include rate discounts.

<sup>[3]</sup> 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?
1,335,607	1,410,534	94.7%	Yes

*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 five (5) recertification complaints in 2013. 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	1	A customer was removed from CARE when their recertification paperwork was not returned to SCE. Customer stated they had faxed the paperwork in; however, could not give a fax number where it was sent, and there is no fax number for that area. An apology was extended for the confusion, but no retroactive billing or credit was performed on the account.	The customer was placed back on CARE.
April	0		
May	1	Customer wrote to the CPUC due to uncertainty about the recertification request received from SCE. SCE Consumer Affairs explained the recertification request and recertification process to the customer, mailed a duplicate recertification package to the customer and advised the customer to complete and return right away.	The customer completed and returned the package on time and was successfully recertified.

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June	0		
July	1	Customer stated they returned their recertification paperwork, however SCE never received it.	The customer was removed from the CARE rate for one month until the customer re-enrolled on CARE. No retroactive billing will be performed
August	0		
September	0		
October	0		
November	0		
December	0		

### 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 discount per CARE customer was \$21.86.

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 \$356,893,194.

#### 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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<b>CARE Administrative Cost Category</b>	<b>Description</b>
<b>Outreach</b>	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.
<b>Processing, Certification, Recertification</b>	Includes: Staff labor, information technology, application processing, training, programming labor, and sub-meter certification.
<b>Post Enrollment Verification</b>	Includes: Staff labor, information technology, verification processing, training, programming labor, and sub-meter verification.
<b>Information Technology/ Programming</b>	Includes: Programming and labor costs associated with system enhancements, Decision compliance, and maintenance of existing processes.
<b>Measurement &amp; Evaluation</b>	Needs Assessment Study
<b>Regulatory Compliance</b>	Includes: Applications, testimony, advice filings, comments and reply comments, hearings, reports and studies, working group meetings, public input meetings, and tariff revisions.
<b>General Administration</b>	Includes: Office supplies, market research, program management labor (including pensions and benefits), and technical support and software licensing.
<b>CPUC Energy Division Staff</b>	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, 2013 was -\$32.890 million.

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

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SCE does not recover CARE-related costs in base rates. In D.97-08-056, the CPUC allocated SCE’s administration costs associated with the CARE Program to SCE’s Public Purpose Programs rate component. D.02-09-021<sup>6</sup> required SCE to establish a CARE balancing account (CBA) to record the following on a monthly basis: (1) the difference between CARE discounts provided to CARE-eligible customers and CARE surcharges billed to non-CARE customers, (2) the difference between the authorized CARE and 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.*

<b>CARE Surcharge and Revenue Collected by Customer Class (2013)</b>					
<b>Customer Class</b>	<b>Average Monthly CARE Surcharge</b>	<b>Average Monthly Bill</b>	<b>CARE Surcharge as Percent of Bill</b>	<b>Total Annual CARE Surcharge Revenue Collected</b>	<b>Percentage of Total Annual CARE Surcharge Revenue Collected</b>
Residential	\$8,817,146	\$414,827,420	2.1%	\$105,805,754	27.6%
Agricultural	\$757,478	\$18,984,140	4.0%	\$9,089,742	2.4%
Commercial	\$16,971,970	\$436,438,703	3.9%	\$203,663,643	53.1%
Industrial	\$3,545,226	\$59,128,472	6.0%	\$42,542,710	11.1%
Public Authority	\$1,851,376	\$44,482,117	4.2%	\$22,216,515	5.8%
Railroads	\$33,410	\$937,018	3.6%	\$400,920	0.1%
Interdepartmental <sup>1</sup>	\$0	\$18,512	0.0%	\$0	0.0%
<b>Totals</b>	<b>\$31,976,607</b>	<b>\$974,816,381</b>	<b>3.3%</b>	<b>\$383,719,283</b>	<b>100.0%</b>

<sup>1</sup> Excludes CARE customers

<sup>2</sup> Electricity supplied for Edison-owned water & gas operations on Santa Catalina Island

<sup>6</sup> D.06-12-038 and Advice 2079-E authorized SCE to eliminate the entry associated with recording CARE balancing account (CBA)-related retail revenue and 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 1,402,052 on December 31, 2012, to 1,335,607 on December 31, 2013, which represents a net decrease of 66,445.

All phone center representatives in SCE's Customer Communications Organization can enroll eligible customers in the CARE Program via the online web enrollment application or send out paper applications if requested. In 2013, 113,631 eligible customers enrolled through the Customer Communications Organization.

Throughout the year, SCE hosted seven "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.

<b>Date</b>	<b>Location</b>
February 21, 2013	Huntington Park
April 10, 2013	Huntington Beach
June 28, 2013	Carson
July 25, 2013	Pico Rivera
August 2, 2013	Los Angeles
October 24, 2013	San Juan Capistrano

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November 13, 2013	Oxnard
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In 2013, SCE participated in more than 100 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 Cinco de Mayo Festival in Santa Ana, Edwards Air Force Base Science Fair, Summer Readiness Preparedness events and Southern California Edison Lamp Exchanges, San Jacinto Agricultural, and Los Angeles County Fairs, more than 29,000 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 2014, 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

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arrangements, avoidance of service disconnections, and restoration of service. The current CHANGES program provides assistance in 18 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 2012):

<b>Component (in language)</b>	<b>Activity</b>
<b>Community Events:</b>	
Chinese Japanese Khmer Korean Spanish Tagalog Vietnamese	CBOs did outreach and distributed materials at 46 local community events serving 20,543 customers.
<b>Media:</b>	
<u>Television</u>	No television interviews were conducted in 2013.
<u>Radio</u> Chinese Spanish Vietnamese	Heavenly Rainbow AM1430 (No. Reached: 10,000) Gold Coast Broadcasting KUNX (No. Reached: 40,000) Bolsa Radio (No. Reached: 100,000)
<u>Print</u> Chinese (No. Reached: 150,000)  Vietnamese (No. Reached: 65,000) Spanish (No. Reached: 50,000) English (No. Reached: 25,000) Tagalog (No. Reached: 95,000) Korean (No. Reached: 64,000) Japanese (No. Reached: 40,000)	Our Town (El Sereno) La Prensa  Song Moi Vietnamese Weekly Magazine Vietnamerican The Record Asian Journal Rumores Miniondas The Korea Times The Korea Daily Lighthouse Magazine Palacio of Long Beach Tribune USA Chinese Christian Herald Crusades Nikansan



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<b>Consumer Education: By Topic</b>	
Arabic Armenian Cantonese English Farsi Indonesian Japanese Khmer Korean Spanish Tagalog Vietnamese Dari Mandarin Russian	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 one-to-one education with 3,684 customers.

### **Marketing**

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

- 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 online Welcome Kit at [SCE.com/welcome](http://SCE.com/welcome), more than 480,000 customers learned about bill paying options, which included CARE/FERA program details and enrollment in financial assistance through Energy Assistance Fund (EAF) if necessary.
- 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.
- 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. In June and July, more than 70,000 identified customers participating in the Medical Baseline program received a packet of information including an introduction letter and 8-page Energy Guide. This Guide, which also targeted seniors, included useful conservation tips and relevant solutions to help manage their electricity and

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lower their energy bills, including enrolling in CARE and participating in the Energy Savings Assistance Program.

- As part of the CARE annual solicitation process in June 2013, SCE included CARE enrollment applications in the bills of nearly 3 million customers receiving a paper bill (not receiving bills online). Because of this effort, nearly 13,000 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 engaged water utilities with overlapping shared service territory to facilitate D.11-05-020 which directs class A and B water utilities and energy utilities to exchange information relating to customers that are currently on their respective low income rate discount programs. The purpose of this effort is to increase participation rates for water low-income assistance programs. Through this expanded data-sharing, more than 3,800 households were enrolled in the CARE program.
- SCE continued its 'self-service' efforts to encourage enrollment through its website ([www.sce.com](http://www.sce.com)), where more than 54,000 households enrolled in CARE. Nearly 20,000 households enrolled via SCE's automated phone system.
- SCE's Home Energy Efficiency Survey Recommendations report included information on CARE and FERA programs.
- In Q4, SCE embarked on an ethnic digital and print media ad campaign to reach the African-American, Asian (Chinese, Korean, Vietnamese, and Filipino) and Native American communities. Print media included Black Voice News, Inland Valley News, Long Beach Times, Sing Tao, Korea Times, Viet Bao and Asian Journal.
- SCE began social media for Income Qualified Programs in Q2 by leveraging Twitter and Facebook to increase awareness and participation in CARE/FERA and ESA. In total, there were more than:
  - 332,000 Facebook and Twitter Impressions
  - 241,000 total Facebook impressions
    - 11 Posts; 356 "Likes"; 214 "Shares"; 23 "Comments"
  - 91,000 Twitter feeds
    - 26 Tweets; 39 "Re-tweets"; 16 "Favorites"

**Earned Media (PR and Outreach)**

**African-American**

17 earned media placements within the African-American community resulted in a total of 891,250 impressions, which includes print and online readers, as well as radio listeners. Two press releases were distributed, titled “Energy Savings Programs Continue to Help SCE Customers Save Money” and “Southern California Edison Partners with Customers to Conserve Energy.”

**Print**

Information about SCE’s money saving programs such as CARE and FERA were published in a number of publications resulting in 9 print media placements such as: Tri-County Sentry, San Bernardino American News (3 placements), Inland Valley News, Long Beach Times (2 placements), West Side Story Newspaper, and Inglewood Today.

**Online**

Online sites such as Blackvoicenews.com, Longbeachtimes.org, lawattstimes.com and sbamerican.com conveyed information on SCE’s money-saving programs such as CARE and FERA, which resulted in six media placements.

**Broadcast**

The San Bernardino-based radio station KCAA AM 1050 discussed the CARE and FERA programs on-air, including the benefits they provide for participants.

A brief summary of total audience reach is as follows:

Total Print Impressions	586,250
Total Broadcast/Online	137,500
<b>Total Audience Reach</b>	<b>723,750</b>

**Asian**

In 2013, 50 earned media placements covering the CARE/FERA programs within the Asian Community totaled 10,916,234 impressions.

A total of one press release “Energy Saving Programs Continue to Help SCE Customers Save Money” and one advertorial garnered great coverage during the months of May, June, November and December of

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2013. The stories were distributed in Cambodian, Chinese, Farsi, Filipino, Indian, Japanese, Korean, Pakistani, Thai and Vietnamese.

### Print

Information about SCE's CARE/FERA programs were conveyed in different Asian market publications including, but not limited to, International Daily News, Korea Herald, Korea Daily, Korea Sunday News, Korea Times, Viet Bao Daily, Siam Media, World Journal, Asian Weekly, Sereechai, Weekend Balita, Angkor Borei News, China Press, Daily Sports Seoul, and India Post:

- Total Earned Placements: 17
- Total Impressions: 3,290,000

### Online/Social Media

Print publications and TV outlets also posted stories online, with a total of 19 placements, including, but not limited to, CTI TV, ZW-TV, Korean Daily, Viet Bao Daily News, Asian Journal, Siam Media, World Journal, Chinese Daily, and Rafu Shimpo:

- Total Earned Placements: 19
- Total Impressions: 5,370,371

### Television

ZW-TV, CTI-TV TVK24 News, interviewed spokesperson on CARE/FERA programs.

- Total Earned Placements: 6
- Total Viewership: 2,250,000

A brief summary of total audience reach is as follows:

Total Print Impressions	3,290,000
Total Online	5,370,371
Total Broadcast	2,250,000
Total Social Media	5,863
<b>Total Audience Reach</b>	<b>10,916,234</b>

### Hispanic

In 2013, 20 earned media placements covering CARE/FERA programs within the Hispanic community totaled 2,356,255 earned media impressions.

### Print

Information about SCE's CARE/FERA programs were conveyed in several different publications including: El Clasificado; La Prensa Hispana LA; and El Panamericano.

- Total Earned Placements: 3
- Total Circulation: 460,000
- Total Impressions: 1,610,000

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### Television

9 interviews were conducted within segments featured in Los Angeles and Palms Springs stations' morning and evening newscast. Stations included: KMEX-TV Univisión 34; KVER-TV Univisión Palms Springs; KWHY-TV Mundo Fox 22; KUNA-TV Telemundo Palms Springs and KVEA-TV Telemundo 52 "Buenos Días Los Angeles":

- Total Earned Hits: 9
- Total Viewership: 343,155

### Online

Publications that posted information about CARE/FERA on their websites include: KVER-TV (Online); Latino California; Long Beach Al Día; El Clasificado; Nuestros Valles and El Panamericano.

- Total Earned Online Hits: 6
- Total Online Visitors: 287,500

### Radio

During a radio interview with KUNA-FM La Poderosa 96.7 FM and W Radio 690 AM

- Total Earned Hits: 2
- Total Listenership: 115,600

A brief summary of total audience reach is as follows:

Total Print Impressions	1,610,000
Total Online	287,500
Total Broadcast	343,155
Total Radio	115,600
<b>Total Audience Reach</b>	<b>2,356,255</b>

### Paid Media

#### **African-American**

Print Advertorials – A total of six advertorials were purchased with African American media outlets that highlighted that SCE's Energy Savings Program can help consumers save during the holiday season. Publications included: Inland Valley News, L.A. Focus, Pasadena Journal, San Bernardino American, Morningside Park Chronicle, and Tri-County Sentry.

#### **Asian**

Print Advertorials – 17 advertorials were purchased with Asian American media outlets and received added-value opportunities that highlighted that SCE's Energy Savings Program can help consumers

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save during the holiday season. Publications included, but were not limited to, Asian Journal, Pakistan Link, Philippines News, Taiwan Daily News, India West and India Journal.

### **A brief summary of Asian Sponsorship and added-value as follows:**

Total CARE/FERA Sponsorship Print Placements = 17

Total Circulation = 606,000

Total Impressions = 2,121,000

Total Added Value- CARE/FERA Social Media Placements = 10

Total Online Impressions = 695,290

### **Hispanic**

Print Advertorials – Seven advertorials were purchased with Hispanic media outlets that highlighted that SCE’s Energy Savings Program can help consumers save during the holiday season. Publications included: Hoy, La Nueva Voz, La Prensa del Valle de Coachella, Miniondas, El Panamericano, Azteca News. Also, Miniondas and La Nueva Voz outlets posted stories online.

### **A brief summary of Hispanic Sponsorship and added-value as follows:**

Total CARE/FERA Sponsorship Print Placements = 7

Total Circulation = 398,500

Total Impressions = 1,394,750

Total Added Value- CARE/FERA Social Media Placements = 4

Twitter Followers= 107

Total Likes= 479

Total Impressions = 586

#### *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 2013 were:

1. Call Center enrollment efforts, which generated 42% of all enrollments;
2. Collateral materials distributed at community outreach events directed customers to SCE’s website for additional program

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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 20% of all enrollments;

3. Internal and external data sharing efforts, which generated 16% of enrollments; and
4. General enrollment efforts, which generated 13% 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.*

Although no formal study has been conducted by SCE to identify barriers to participation, SCE believes through anecdotal information and experience that some barriers to participation do exist. These include lack of knowledge about the availability of CARE, language and cultural barriers, geographical barriers to reach potentially-eligible customers, and a certain segment of the eligible population that does not wish to participate.

As described in this report, SCE uses a multifaceted outreach approach to reach its potential CARE-eligible customers. In 2013, 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 and correspondence to reach increasing numbers of ethnic populations and under-penetrated geographic areas. SCE believes this approach continues to make progress in overcoming barriers to enrollment.

### *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 2013, nearly 36,821 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, 2,559 customers enrolled in CARE during 2013. The CARE program continually integrates its efforts and messaging with the ESA program at all outreach events, communications, and marketing campaigns. SCE also enrolled 770 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 2013, 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 2,411 enrollments in 2013.

- 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 2013, SCE implemented system enhancements to improve program processes and support regulatory changes. For example, during verification processing (high usage and non-high usage), the system now allows users direct data entry into the system via a verification calculation sheet and the system automatically determines continued eligibility based on current income guidelines.

In addition, SCE’s Call Center representatives are continuing to immediately enroll qualified customers when they call in for other inquires, such as billing disputes or payment issues, instead of mailing an application to their homes. Also, through quarterly joint utility meetings, best practices are continually discussed and reviewed to improve the effectiveness of SCE's CARE program.

Cost effectiveness of various outreach and enrollment strategies is described in Section 2.5.2.

## **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

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a mailed renewal request. If no response is received within 45-days, SCE will mail a second request to the tenants prior to removal.

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

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

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

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

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

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

SCE can make a comparison of outreach cost per enrollment. The following table shows that SCE's cost per enrollment is about 17 percent of the cost per enrollment for the Capitation Fee program.

<b>Comparison of Cost per Enrollment between SCE and Third Parties</b>			
	Enrolled	Outreach Cost	Cost per Enrollment
SCE	284,579	\$1,548,916.94	\$5.44
Capitation Fee Project <sup>[1]</sup>	3,787	\$118,343.85	\$31.25
<sup>[1]</sup> 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.			

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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.

<b>Comparison of Cost per Enrollment Percent between SCE and Third Parties</b>			
Enrollment Activity	Received	Approved	Percent
<b>SCE</b>			
SCE Call Center Requests	128,290	113,631	89%
SCE Direct Mail	16,792	13,271	79%
Special Projects/Events	19,522	18,586	95%
Internet Enrolments	54,333	54,333	100%
PG&E Data Exchange	-	-	-
SWG Data Exchange	-	-	-
SoCalGas Data Exchange	33,893	32,959	97%
Water Utilities Data Exchange	4,269	3,862	90%
DCSD Automatic Enrollment	-	-	0%
Other Miscellaneous Sources	64,737	45,682	71%
<b>Third Parties</b>			
Capitation Fee Project	4,790	3,787	79%
ESA Contractors	2,569	2,559	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 2013, 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.*

<b>CARE Expansion Program Participating Facilities by Month</b>			
<b>2013</b>	<b>CARE Residential Facilities</b>	<b>CARE Commercial Facilities</b>	<b>Total</b>
January	372	164	536
February	377	160	537
March	403	169	572
April	409	167	576
May	410	164	574
June	410	169	579
July	417	170	587
August	428	171	599
September	416	169	585
October	407	174	581
November	404	174	578
December	402	176	578

*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.*

<b>ESTABLISH IN 2013</b>			<b>RECERT IN 2013</b>		<b>CLOSED in 2013</b>	
<b>Commercial/ Residential</b>	<b>Service Accounts</b>	<b>No. of Beds</b>	<b>Service Accounts</b>	<b>No. of Beds</b>	<b>Service Accounts</b>	<b>No. of Beds</b>
Commercial	24	1,039	25	913	13	510
Residential	78	1,119	41	669	45	201
<b>TOTAL</b>	<b>102</b>	<b>2,158</b>	<b>66</b>	<b>1,582</b>	<b>58</b>	<b>711</b>

### 3.2 Usage Information

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

CARE Expansion Program Average Monthly Gas / Electric Usage		
Customer	Gas Therms	Electric KWh
Residential Facilities	N/A	870
Commercial Facilities	N/A	12,249

### 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 \$646.09.

*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 \$5,156.36.

### 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

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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.

### 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.*

See SCE's response to question 2.4.3.

### 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.*

See SCE's response to question 2.4.8.

## 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.*

There were no significant issues/events that impacted program management in this reporting period.

## SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014

### 4. Fund Shifting

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

SCE reports a carryover of \$17,853 in unexpended 2012 Statewide Marketing, Education, and Outreach funds into the same category in 2013. See detail in ESA Table 12. SCE did not shift funds between categories in 2013. SCE is authorized to carryover or carryback funds within categories and subcategories in the 2012-2014 program cycle.

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

SCE reports a \$77,918 fund shift from the General Administration budget category to the Measurement & Evaluation budget category. SCE reports a \$ 154,766 fund shift from the Post Enrollment Verification budget category to the Pilots budget category for the CHANGES Pilot. The Pilots budget category does not have authorized funding from D.12-08-044, although SCE was directed to fund CHANGES in D.12-12-011. Additional information is provided 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.

## SCE ESA AND CARE PROGRAMS ANNUAL REPORT – MAY 1, 2014

### 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



A	B	C	D	E	F	G	H	I	J
PY 2013 Energy Savings Assistance and CARE Programs Annual Report									
ESA Table 1									
ESA Overall Program Expenses									
Southern California Edison									
	2013 Authorized Budget			2013 Annual Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total <sup>(1)</sup>	Electric	Gas	Total
1									
2									
3	ESA Program:								
4	Energy Efficiency								
5	Appliances	\$ 21,019,806	\$	21,019,806	\$ 14,818,832	\$ 14,818,832	70%		70%
6	Domestic Hot Water	\$ 51,071	\$	51,071	\$ 11,469	\$ 11,469	22%		22%
7	Enclosure	\$ 268,975	\$	268,975	\$ 72,475	\$ 72,475	27%		27%
8	HVAC	\$ 27,293,630	\$	27,293,630	\$ 23,915,134	\$ 23,915,134	88%		88%
9	Maintenance	\$ 233,333	\$	233,333	\$ 91,520	\$ 91,520	39%		39%
10	Lighting	\$ 3,273,102	\$	3,273,102	\$ 2,333,934	\$ 2,333,934	71%		71%
11	Miscellaneous	\$ 4,726,931	\$	4,726,931	\$ 3,236,721	\$ 3,236,721	68%		68%
12	Customer Enrollment	\$ 5,614,437	\$	5,614,437	\$ 5,360,671	\$ 5,360,671	95%		95%
13	In Home Education	\$ 1,246,139	\$	1,246,139	\$ 688,890	\$ 688,890	55%		55%
14	Pilot	\$ -	\$	-	\$ -	\$ -	0%		0%
15	<b>Energy Efficiency TOTAL</b>	<b>\$ 63,727,426</b>	<b>\$</b>	<b>63,727,426</b>	<b>\$ 50,529,646</b>	<b>\$ 50,529,646</b>	<b>79%</b>		<b>79%</b>
16									
17	Training Center	\$ 347,285	\$	347,285	\$ 175,581	\$ 175,581	51%		51%
18	Inspections	\$ 1,508,305	\$	1,508,305	\$ 878,500	\$ 878,500	58%		58%
19	Marketing and Outreach	\$ 1,414,000	\$	1,414,000	\$ 127,426	\$ 127,426	9%		9%
20	Statewide Marketing Education and Outreach	\$ 120,000	\$	120,000	\$ 137,853	\$ 137,853	115%		115%
21	Measurement and Evaluation Studies	\$ 200,000	\$	200,000	\$ 1,041,956	\$ 1,041,956	521%		521%
22	Regulatory Compliance	\$ 594,000	\$	594,000	\$ 358,159	\$ 358,159	60%		60%
23	General Administration	\$ 4,669,000	\$	4,669,000	\$ 2,379,766	\$ 2,379,766	51%		51%
24	CPUC Energy Division	\$ 60,000	\$	60,000	\$ 943	\$ 943	2%		2%
25									
26	<b>TOTAL PROGRAM COSTS</b>	<b>\$ 72,640,016</b>	<b>\$</b>	<b>72,640,016</b>	<b>\$ 55,629,829</b>	<b>\$ 55,629,829</b>	<b>77%</b>		<b>77%</b>
27	<b>Costs Outside of ESA Program Budget</b>								
28	Indirect Costs				\$ 768,728	\$ 768,728			
29	NGAT Costs								
30									
31	[1] Estimates - SCE is reconciling financial and program tracking systems and will file an errata if results are revised.								

	A	B	C	D	E	F	G	H
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report ESAP Table 2 ESA Expenses and Energy Savings by Measures Installed Southern California Edison</b>							
2			<b>PY Completed &amp; Expensed Installations</b>					
3	<b>Measures</b>	<b>Units</b>	<b>Quantity Installed</b>	<b>kWh<sup>[5]</sup> (Annual)</b>	<b>kW<sup>[5]</sup> (Annual)</b>	<b>Therms (Annual)</b>	<b>Expenses<sup>[6]</sup> (\$)</b>	<b>% of Expenditure</b>
4	<b>Appliances</b>							
5	High Efficiency Clothes Washer	Each						
6	Refrigerators	Each	17,365	12,074,027	2,058		14,861,877	30%
7	Microwaves	Each						
8	<b>Domestic Hot Water</b>							
9	Water Heater Blanket	Home	36	2,209	0		1,619	0%
10	Low Flow Shower Head	Home	228	7,263	2		6,381	0%
11	Water Heater Pipe Insulation	Home	48	859	0		828	0%
12	Faucet Aerator	Home	233	4,869	1		2,641	0%
13	Water Heater Repair/Replacement	Each						
14	Thermostatic Shower Valve	Each						
15	<b>Enclosure</b>							
16	Air Sealing / Envelope <sup>[1]</sup>	Home	629	93,596	0		69,484	0%
17	Attic Insulation	Home	4				2,991	0%
18	<b>HVAC</b>							
19	FAU Standing Pilot Light Conversion	Each						
20	Furnace Repair/Replacement	Each						
21	Room A/C Replacement	Each	683	38,569	43		511,752	1%
22	Central A/C Replacement	Each	3,178	250,400	275		12,492,657	25%
23	Heat Pump Replacement	Each	55	37,278	17		160,640	0%
24	Evaporative Coolers (Replacement)	Each						
25	Evaporative Coolers (Installation)	Each	12,017	5,893,814	7,323		10,729,945	21%
26	Duct Testing and Sealing	Home	3,057	544,195	739		655,250	1%
27	<b>Maintenance</b>							
28	Furnace Clean and Tune	Home						
29	Central A/C Tune-up	Home	704	127,255	20		91,520	0%
30	Evaporative Cooler Maintenance	Home						
31	<b>Lighting</b>							
32	Compact Fluorescent Lights (CFLs)	Each	260,517	6,564,968	782		1,768,975	4%
33	Interior Hard wired CFL fixtures	Each						
34	Exterior Hard wired CFL fixtures	Each	629	49,402	6		53,465	0%
35	Torchiere	Each	6,019	1,149,629	120		319,012	1%
36	Occupancy Sensor	Each						
37	LED Night Lights	Each						
38	<b>Miscellaneous</b>							
39	Pool Pumps	Each	1,926	3,354,885	1,055		1,685,250	3%
40	Smart Power Strips	Each	27,326	872,132	156		749,327	1%
41	<b>Pilots</b>							
42		Each						
43		Each						
44	<b>Customer Enrollment</b>							
45	Outreach & Assessment	Home	78,842				5,360,671	11%
46	In-Home Education	Home	65,707				688,890	1%
47								
48	<b>Total Savings</b>			<b>31,065,349</b>	<b>12,596</b>		<b>50,213,175</b>	
49								
50	Households Weatherized <sup>[2]</sup>	Home	628					
51								
52	<b>Homes Treated</b>							
53	- Single Family Homes Treated	Home	51,797					
54	- Multi-family Homes Treated	Home	13,370					
55	- Mobile Homes Treated	Home	3,864					
56	<b>- Total Number of Homes Treated<sup>[3]</sup></b>	Home	<b>69,031</b>					
57	<b># Eligible Homes to be Treated in 2013<sup>[4]</sup></b>	Home	<b>87,389</b>					
58	<b>% OF Homes Treated</b>	%	<b>79%</b>					
59	- Total Master-Metered Homes Treated	Home	1,919					
60	<sup>[1]</sup> "Air Sealing / Envelope" may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and							
61	<sup>[2]</sup> Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs							
62	<sup>[3]</sup> SCE's assumptions for treated homes are: • A "treated home" is defined as an income qualified and assessed home that meets the 3MM Rule by receiving 1) three electric measures, or 2) three gas measures, or 3) combination of any three gas and electric measures, or 4) one or two measures that achieve a minimum of 125 kWh savings, or 5) one or two gas measures meeting the 25 Therm threshold. SCE can offer in-home energy education in all treated homes. • An income-qualified and assessed home that 1) meets the three measure minimum rule from a gas IOU, and 2) has been assessed for all electric measures with a determination that none are feasible for installation is considered treated by SCE, regardless of whether SCE installs any additional measures. In these homes, SCE can share the cost of in-home energy education with the gas IOU and may count the home as treated. • An income-qualified and assessed multi-family home that does not receive gas measures, but achieves the 125 kWh threshold through the installation of only CFLs, may be counted as treated and SCE can offer in-home energy education in these homes. • An income-qualified and assessed home that does not receive any measures from SCE or a gas IOU is not considered treated and SCE cannot offer or incur cost for in-home energy education.							
63	<sup>[4]</sup> Based on Attachment F of D.12-08-044							
64	<sup>[5]</sup> All savings are calculated based on the "Impact Evaluation of the 2009 CA Low Income Energy Efficiency Program, Final Report." June 16, 2011, when data are available, and other sources as described in Attachment A-2 of SCE's Testimony in Support of Application for Approval of Low Income Programs and Budgets for Program Years 2012 - 2014, filed May 16, 2011.							
65	<sup>[6]</sup> Costs exclude support costs that are included in Table 1.							

	A	B	C	D	E	F	G
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report ESA Table 3 ESA Program Cost-Effectiveness Southern California Edison</b>						
2	PY - Recorded <sup>[1]</sup>						
3	Ratio of Benefits Over Costs			Net Benefits; \$ Millions			
4	Program Year <sup>[2]</sup>	Utility Cost Test	Total Resource Cost Test <sup>[3]</sup>	Modified Participant Test	Utility Cost Test	Total Resource Cost Test <sup>[3]</sup>	Modified Participant Test
5	2013	1.09	0.88	0.90	\$ 4.76	\$ (6.49)	\$ (5.35)
6	2012	0.74	0.59	0.71	\$ (9.75)	\$ (15.41)	\$ (10.96)
7	2011	0.69	0.55	0.69	\$ (15.48)	\$ (22.78)	\$ (15.63)
8	2010	0.77	0.59	0.74	\$ (14.85)	\$ (26.54)	\$ (17.07)
9	2009	0.77	0.61	0.76	\$ (9.70)	\$ (16.67)	\$ (10.39)
10	2008	0.72	0.61	0.75	\$ (10.81)	\$ (14.83)	\$ (9.45)
11	2007	0.59	0.52	1.29	\$ (13.25)	\$ (15.59)	\$ 9.29
12	2006	0.81	0.72	1.36	\$ (5.92)	\$ (8.91)	\$ 11.38
13	2005	0.69	0.59	0.99	\$ (6.98)	\$ (9.31)	\$ (0.17)
14	2004	0.82	0.63	1.05	\$ (2.89)	\$ (5.90)	\$ 0.79
15	2003	0.73	0.58	1.04	\$ (5.13)	\$ (7.70)	\$ 0.74
16	2002	1.08	0.93	1.94	\$ 1.16	\$ (1.14)	\$ 14.25
17							
18	E3 - Version SCE2013 V1c4						
19							
20	<sup>[1]</sup> - Source of 2013 data						
21					Resource Benefits, E3 Calculator	\$ 46,574,720	
22					Utility NEB, LIPPT Workbook	\$ 10,946,496	
23					Participant NEB, LIPPT Workbook	\$ 7,902,858	
24					Program Cost, E3 Calculator	\$ 55,629,830	
25					NPV Program Cost, E3 Calculator	\$ 53,067,895	
26					NPV Utility Cost, E3 Calculator	\$ 52,761,723	
27					NPV Bill Savings, LIPPT	\$ 39,513,261	
28							
29	<sup>[2]</sup> Data from prior years have been entered from prior ESA (LIEE) Annual Reports						
30							
31	<sup>[3]</sup> 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.						

	A	B	C	D	E	F	G
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b>						
	<b>ESA Table 4</b>						
	<b>Detail by Housing Type and Source</b>						
	<b>Southern California Edison</b>						
2	<b>2013 Energy Savings</b>						
3	Customer	Housing Type	# Homes Treated	(MWh)	MW	(mTherm*)	2013 Expenses <sup>[1]</sup>
4	<b>Gas and Electric Customers</b>						
5	<b>Owners - Total</b>						
6		Single Family					
7		Multi Family					
8		Mobile Homes					
9	<b>Renters - Total</b>						
10		Single Family					
11		Multi Family					
12		Mobile Homes					
13	<b>Electric Customers (only)</b>						
14	<b>Owners - Total</b>						
15		Single Family	37,045	17,349	9		30,815,802
16		Multi Family	33,526	15,936	8.1		\$ 28,053,630
17		Mobile Homes	407	126	0.0		\$ 208,798
18	<b>Renters - Total</b>						
19		Single Family	3,112	1,287	0.7		\$ 2,553,374
20		Multi Family	31,986	13,716	4		19,397,373
21		Mobile Homes	18,271	8,575	2.8		\$ 12,004,991
22		Multi Family	12,963	4,723	0.7		\$ 6,795,358
23		Mobile Homes	752	418	0.2		\$ 597,024
24	<b>Gas Customers (only)</b>						
25	<b>Owners - Total</b>						
26		Single Family					
27		Multi Family					
28		Mobile Homes					
29	<b>Renters - Total</b>						
30		Single Family					
31		Multi Family					
32		Mobile Homes					
33	<b>Totals:</b>						

<b>Penetration History</b>					
Year	Homes Treated <sup>[2]</sup>	Ineligible & Unwilling <sup>[3]</sup>	Estimated Eligible in Current Year <sup>[4]</sup>	Current Year Penetration Rate for Homes Treated	
2002	29,685				
2003	33,348				
2004	38,996				
2005	36,420				
2006	53,017				
2007	44,323				
2008	54,635				
2009	61,834	22,109	83,445	74%	
2010	121,016	41,110	83,445	145%	
2011	93,771	25,067	83,446	112%	
2012	49,026	19,833	87,389	56%	
2013	69,031	37,449	87,389	79%	
2014					
2015					
2016					
2017					
2018					
2019					
2020					
<b>Total Homes Treated since 2002</b>	685,102				

<sup>[1]</sup> Excluding indirect program costs.

<sup>[2]</sup> Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative.

<sup>[3]</sup> 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.

<sup>[4]</sup> Based on Attachment F of D.12-08-044.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2013	PG&E	101,710	3,222
2013	SoCalGas	1,214,480	19,637
2013	SDG&E	17,506	20

	A	B	C	D	E	F	G
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report ESA Table 5 ESA Program Direct Purchases &amp; Installation Contractors Southern California Edison</b>						
2	<b>Contractor</b>	<b>County</b> <sup>[1]</sup>	<b>Contractor Type (Check one or more if applicable)</b>				<b>2013 Annual Expenditures</b>
3			Private	CBO	WMDVBE	LIHEAP	
4	American Electric Supply, Inc.	All	x				\$ 515,108
5	American Insulation, Inc.	14	x		x		\$ 55,192
6	Assert, Inc.	2,4		x			\$ 371,539
7	Autocell Electronics, Inc. <sup>[2]</sup>	All	x				\$ 863,873
8	Community Action Partnership of San Bernardino County	8		x	x	x	\$ 39,074
9	Community Action of Ventura County	9, 11		x		x	\$ 246,993
10	Energy Efficiency Resources, Inc. <sup>[2]</sup>	All	x		x		\$ 16,312,598
11	Energy Save	4	x				\$ 1,320,320
12	Environmental Assessment Services & Education of California	4, 7	x				\$ 219,865
13	FCI Management Consultants	4	x		x		\$ 37,076
14	Gary's Pool Supplies <sup>[2]</sup>	All	x				\$ 1,754,295
15	Home Energy Assistance Living, Inc.	4	x		x		\$ 578,018
16	Inter City Energy Systems, Inc.	14	x				\$ 956,939
17	Inyo Mono Advocates for Community Action	1, 4, 5		x		x	\$ 230
18	John Harrison Contracting, Inc.	4, 7, 8	x		x		\$ 4,556,151
19	Long Beach Community Services Development Corp.	4, 6		x		x	\$ 14,907
20	Maravilla Foundation	2, 4, 8, 10		x	x	x	\$ 2,223,724
21	Pacific Asian Consortium in Employment	4		x	x	x	\$ 25,322
22	Peace Officers for Green Environment	4, 6, 7, 8, 9,	x		x		\$ 3,035,743
23	Proteus, Inc.	2, 3, 4, 8, 10		x			\$ 2,741,328
24	Quality Conservation Services, Inc.	14	x				\$ 309,573
25	Reliable Energy Management, Inc.	1, 2, 4, 6, 8,	x		x		\$ 1,613,721
26	Richard Heath and Associates, Inc. <sup>[3]</sup>	All	x		x		\$ 790,095
27	Saving Energy Consulting Services, Inc.	4, 6, 7	x		x		\$ 419,374
28	SEARS Commercial <sup>[2]</sup>	All	x				\$ 4,539,622
29	Synergy Companies	All	x				\$ 280,167
30	Tri-State Home Improvements, Inc.	4, 7, 8	x		x		\$ 6,745,093
31	Veterans in Community Services, Inc.	4		x	x	x	\$ 405,985
32	Village Solutions Foundation	6		x			\$ 43,604
33	<b>Total Direct Purchases &amp; Installations</b>						<b>\$ 51,015,530</b>
34	<sup>[1]</sup> Legend for Counties Served						
35							
36	1 Inyo	6 Orange		11 Ventura			
37	2 Kern	7 Riverside		12 Fresno			
38	3 Kings	8 San Bernardino		13 Service clients from within the organization			
39	4 Los Angeles	9 Santa Barbara		14 Service SCG customers only			
40	5 Mono	10 Tulare					
41							
42	<sup>[2]</sup> Appliance Supplier						
43	<sup>[3]</sup> Inspections						



	A	B	C	D	E
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report ESA Table 7 Expenditures Recorded by Cost Element Southern California Edison</b>				
2	<b>ESA Program:</b>	<b>Labor <sup>[1]</sup></b>	<b>Non-Labor <sup>[2]</sup></b>	<b>Contract <sup>[3]</sup></b>	<b>Total</b>
3	<b>Energy Efficiency</b>				
4	Appliances			\$ 14,818,832	\$ 14,818,832
5	Domestic Hot Water			\$ 11,469	\$ 11,469
6	Enclosure			\$ 72,475	\$ 72,475
7	HVAC			\$ 23,915,134	\$ 23,915,134
8	Maintenance			\$ 91,520	\$ 91,520
9	Lighting			\$ 2,333,934	\$ 2,333,934
10	Miscellaneous			\$ 3,236,721	\$ 3,236,721
11	Customer Enrollment			\$ 5,360,671	\$ 5,360,671
12	In Home Education			\$ 688,890	\$ 688,890
13	Pilot			\$ -	\$ -
14	<b>Energy Efficiency TOTAL</b>			\$ 50,529,646	\$ 50,529,646
15		\$ -	\$ -		
16	Training Center	\$ 113,069	\$ 29,803	\$ 32,709	\$ 175,581
17	Inspections	\$ 61,058	\$ (11,188)	\$ 828,629	\$ 878,500
18	Marketing and Outreach	\$ 295	\$ 52,802	\$ 74,329	\$ 127,426
19	Statewide Marketing Education and Outreach	\$ 117	\$ 1,528	\$ 136,208	\$ 137,853
20	Measurement and Evaluation Studies	\$ 13,937	\$ 38,416	\$ 989,603	\$ 1,041,956
21	Regulatory Compliance	\$ 346,700	\$ 4,881	\$ 6,579	\$ 358,159
22	General Administration	\$ 1,402,534	\$ 183,123	\$ 794,109	\$ 2,379,766
23	CPUC Energy Division		\$ 943		\$ 943
24					
25	<b>TOTAL PROGRAM COSTS</b>	\$ 1,937,710	\$ 300,307	\$ 53,391,812	\$ 55,629,829
26					
27	<sup>[1]</sup> Labor costs include any internal direct (administrative and/or implementation) costs (indirect costs are a				
28	<sup>[2]</sup> Non-Labor costs include all direct internal (administrative and/or implementation) costs (indirect costs are				
29	<sup>[3]</sup> Contract costs include all outsourced costs (administrative and/or implementation). Contract costs do not need				

	A	B	C	D	E	F	G	H	I
	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b>								
	<b>ESA Table 8</b>								
	<b>ESA Homes Unwilling / Unable to Participate</b>								
	<b>Southern California Edison</b>								
1									
2	<b>Reason Provided</b>								
3	<b>County</b>	<b>Customer/ Landlord Declined Program Measures or is Non- Responsive</b>	<b>Customer Unavailable - Scheduling Conflicts</b>	<b>Hazardous Environment (unsafe/unclean)</b>	<b>Insufficient feasible Measures</b>	<b>Ineligible Dwelling - Prior Program Participation</b>	<b>Household Income Exceeds Allowable Limits</b>	<b>Unable to Provide Required Documentation</b>	<b>Other</b>
4	Fresno	-	-	-	-	-	-	-	-
5	Imperial	-	-	-	-	-	-	-	-
6	Inyo	1	-	-	4	-	1	3	22
7	Kern	2	15	-	55	494	7	71	345
8	Kings	2	7	-	21	205	7	23	739
9	Los Angeles	177	242	31	1,112	12,300	470	3,402	18,846
10	Madera	-	-	-	-	-	-	-	-
11	Mono	-	-	-	1	-	-	1	-
12	Orange	11	33	1	212	2,478	112	511	4,191
13	Riverside	90	81	4	424	4,075	257	795	5,769
14	San Bernardino	193	159	4	789	4,158	295	1,881	7,065
15	San Diego	-	-	-	-	-	-	-	-
16	Santa Barbara	-	-	-	5	6	4	-	57
17	Tulare	21	38	1	139	1,294	29	84	2,761
18	Ventura	1	12	2	46	316	80	154	1,022
19									
20	<b>Total</b>	498	587	43	2,808	25,326	1,262	6,925	40,817



	A	B	C	D	E	F	G
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b> <b>ESAP Table 9</b> <b>Life Cycle Bill Savings by Measure</b> <b>Southern California Edison</b>						
2	<b>Measure Description</b>		<b>2013 Number Installed</b>	<b>Per Measure Electric Impact - Average (kWh)</b>	<b>Per Measure Gas Impact (Therms)</b>	<b>Effective Useful Life (EUL)</b>	<b>2013 Total Measure Life Cycle Bill Savings <sup>[1]</sup></b>
3	<b>Appliances</b>						
4	High Efficiency Clothes Washer	Each					
5	Refrigerators	Each	17,365	695		14	\$ 16,709,306
6	Microwaves	Each					
7	<b>Domestic Hot Water</b>						
8	Water Heater Blanket	Home	35	65		7	\$ 1,839
9	Low Flow Shower Head	Home	226	32		10	\$ 7,840
10	Water Heater Pipe Insulation	Home	48	18		11	\$ 997
11	Faucet Aerator	Home	230	21		10	\$ 5,214
12	Water Heater Repair/Replacement	Each					
13	Thermostatic Shower Valve	Each					
14	<b>Enclosure</b>						
15	Air Sealing / Envelope	Home	632	85		11	\$ 62,596
16	Attic Insulation	Home	4			-	
17	<b>HVAC</b>						
18	FAU Standing Pilot Light Conversion	Each					
19	Furnace Repair/Replacement	Each					
20	Room A/C Replacement	Each	683	56		9	\$ 38,302
21	Central A/C Replacement	Each	3,178	78		15	\$ 361,316
22	Heat Pump Replacement	Each	55	681		15	\$ 54,318
23	Evaporative Coolers (Replacement)	Each					
24	Evaporative Coolers (Installation)	Each	12,017	490		15	\$ 8,552,836
25	Duct Testing and Sealing	Home	3,057	178		18	\$ 889,374
26	<b>Maintenance</b>						
27	Furnace Clean and Tune	Home					
28	Central A/C Tune-up	Home	704	181		5	\$ 77,027
29	Evaporative Cooler Maintenance	Home					
30	<b>Lighting</b>						
31	Compact Fluorescent Lights (CFLs)	Each	260,517	25		10	\$ 6,523,787.89
32	Interior Hard wired CFL fixtures	Each					
33	Exterior Hard wired CFL fixtures	Each	629	79		16	\$ 74,854
34	Torchiere	Each	6,019	191		16	\$ 1,741,920
35	Occupancy Sensor	Each					
36	LED Night Lights	Each					
37	<b>Miscellaneous</b>						
38	Pool Pumps	Each	1,926	1,743		10	\$ 3,623,670
39	Smart Power Strips	Each	27,326	32		8	\$ 788,064
40	<b>Pilots</b>						
41		Each					
42			334,651				
43	<b>Total Homes Served By the Program</b>	69,031					\$ 39,513,261
44	<b>Life Cycle Bill Savings Per Home</b>						\$ 572.40
45							
46	<sup>[1]</sup> Net Present Values of Lifecycle Bill Savings						

	A	B	C
	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b> <b>ESA Table 10</b> <b>Energy Rate Used for Bill Savings Calculations</b> <b>Southern California Edison</b>		
1			
2	Year	\$/kWh [1]	\$/Therm
3	2013	0.1332	N/A
4	2014	0.1371	N/A
5	2015	0.1413	N/A
6	2016	0.1455	N/A
7	2017	0.1499	N/A
8	2018	0.1544	N/A
9	2019	0.1590	N/A
10	2020	0.1638	N/A
11	2021	0.1687	N/A
12	2022	0.1737	N/A
13	2023	0.1789	N/A
14	2024	0.1843	N/A
15	2025	0.1898	N/A
16	2026	0.1955	N/A
17	2027	0.2014	N/A
18	2028	0.2074	N/A
19	2029	0.2137	N/A
20	2030	0.2201	N/A
21	2031	0.2267	N/A
22	2032	0.2335	N/A
23	2033	0.2405	N/A
24	2034	0.2477	N/A
25	2035	0.2551	N/A
26	2036	0.2628	N/A
27	2037	0.2707	N/A
28			

	A	B	C	D	E
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b> <b>ESA Table 11</b> <b>Bill Savings Calculations by Program Year</b> <b>Southern California Edison</b>				
2	Program Year <sup>[1]</sup>	Program Costs <sup>[1]</sup>	Program Lifecycle Bill Savings <sup>[2]</sup>	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings <sup>[2]</sup>
3	2011	\$ 50,340,375	\$ 55,501,061	1.10	\$ 591.88
4	2012	\$ 39,378,995	\$ 24,591,923	0.62	\$ 501.61
5	2013	\$ 49,917,459	\$ 39,513,261	0.79	\$ 572.40

PY 2013 Energy Savings Assistance and CARE Programs Annual Report  
 ESA Table 12  
 Energy Savings Assistance Program Fund Shifting  
 Southern California Edison

1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y																		
																										FUND SHIFT AMOUNT											Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization			
																										Budget			Expenditures			(Shift) or Carried Forward (Budget - Expenditures = Variance)			Among Categories within Program Year 1-3 (1) Shift of Current Year Authorized						Total Shifted Gas/ Electric <sup>(1)</sup>	% of Authorized Total	
																										Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas							Total
2	Program Year 2013																																										
3	ESA Program:																																										
4	Energy Efficiency																																										
5	6. Energy Efficiency																																										
6	7. Energy Efficiency																																										
7	8. Energy Efficiency																																										
8	9. Energy Efficiency																																										
9	10. Energy Efficiency	\$ 21,019,806	\$ -	\$ 21,019,806	\$ 14,818,832	\$ -	\$ 14,818,832	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
10	11. Domestic Hot Water	\$ 51,071	\$ -	\$ 51,071	\$ 11,469	\$ -	\$ 11,469	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
11	12. Enclosure	\$ 268,975	\$ -	\$ 268,975	\$ 72,475	\$ -	\$ 72,475	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
12	13. HVAC	\$ 27,293,630	\$ -	\$ 27,293,630	\$ 23,915,134	\$ -	\$ 23,915,134	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
13	14. Maintenance	\$ 233,333	\$ -	\$ 233,333	\$ 91,520	\$ -	\$ 91,520	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
14	15. Lighting	\$ 3,273,102	\$ -	\$ 3,273,102	\$ 2,333,934	\$ -	\$ 2,333,934	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
15	16. Miscellaneous	\$ 4,726,931	\$ -	\$ 4,726,931	\$ 3,236,721	\$ -	\$ 3,236,721	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
16	17. Home Enrollmen	\$ 591,439	\$ -	\$ 591,439	\$ 59,628	\$ -	\$ 59,628	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
17	18. Home Education	\$ 1,248,139	\$ -	\$ 1,248,139	\$ 686,248	\$ -	\$ 686,248	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
18	19. Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
19	20. Energy Efficiency TOTAL	\$ 63,727,426	\$ -	\$ 63,727,426	\$ 50,529,646	\$ -	\$ 50,529,646	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
20	21. Training Center	\$ 347,285	\$ -	\$ 347,285	\$ 175,691	\$ -	\$ 175,691	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
21	22. Inspections	\$ 1,505,305	\$ -	\$ 1,505,305	\$ 878,500	\$ -	\$ 878,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
22	23. Marketing and Outreach	\$ 1,414,000	\$ -	\$ 1,414,000	\$ 127,426	\$ -	\$ 127,426	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
23	24. Statewide ME&O <sup>(2)</sup>	\$ 120,000	\$ -	\$ 120,000	\$ 137,853	\$ -	\$ 137,853	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
24	25. M&E Studies <sup>(3)</sup>	\$ 200,000	\$ -	\$ 200,000	\$ 1,041,956	\$ -	\$ 1,041,956	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
25	26. Regulation Compliance <sup>(4)</sup>	\$ 694,000	\$ -	\$ 694,000	\$ 358,159	\$ -	\$ 358,159	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
26	27. General Administrator <sup>(5)</sup>	\$ 4,693,000	\$ -	\$ 4,693,000	\$ 2,379,766	\$ -	\$ 2,379,766	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
27	28. CPUC Energy Division <sup>(6)</sup>	\$ 60,000	\$ -	\$ 60,000	\$ 943	\$ -	\$ 943	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
28	29. TOTAL PROGRAM COSTS	\$ 72,640,016	\$ -	\$ 72,640,016	\$ 55,629,829	\$ -	\$ 55,629,829	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
29	30. Carry Forward from Prior Years	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
30	31. Carry Back from Future Years	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
31	32. CARRY FORWARD / CARRY BACK	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
32	33. CARRY BACK	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
33	34. TOTAL PROGRAM COSTS INCLUDING CARRY FORWARD / CARRY BACK	\$ 72,640,016	\$ -	\$ 72,640,016	\$ 55,629,829	\$ -	\$ 55,629,829	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
34	35. TOTAL PROGRAM COSTS INCLUDING CARRY FORWARD / CARRY BACK	\$ 72,640,016	\$ -	\$ 72,640,016	\$ 55,629,829	\$ -	\$ 55,629,829	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		
35	36. Total Program Costs	\$ 72,640,016	\$ -	\$ 72,640,016	\$ 55,629,829	\$ -	\$ 55,629,829	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																		

<sup>(1)</sup> SCE's 2012 total unspent balance available for carry-forward was approximately \$55 million.

<sup>(2)</sup> Numbers reported in standard accounting format, with negative amounts displayed in parentheses (\$xxx.xx).

<sup>(3)</sup> Prior written authorization from the Commission is required before the utility can shift into or out of these categories.

<sup>(4)</sup> M&E studies were funded at \$600,000 over a 3 year period. As contract lead for the Low Income Needs Assessment and Energy Education Studies, SCE is awaiting payment from some of the IOUs for their share of these studies, which will bring total expenditures within the \$600,000 limit over the 3 year period.

<sup>(5)</sup> Includes funds required for 2013 expenditures, and does not reflect all available carryover from 2012 or prior funding cycles.

<sup>(6)</sup> SCE's 2012 total unspent balance available for carry-forward was approximately \$55 million.

<sup>(7)</sup> SCE does not control spending of statewide ME&O funds. Because no funds were spent in this category during 2012, funds were available within this category to carry forward.

	A	B
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b> <b>ESA Table 13</b> <b>Categorical and Other Enrollment</b> <b>Southern California Edison</b>	
2	<b>Type of Enrollment</b>	<b>Number of customers treated <sup>[1]</sup></b>
3	Women, Infants, and Children Program (WIC)	4,647
4	Supplemental Security Income (SSI)	2,090
5	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	3,334
6	CalWORKs/Temporary Assistance for Needy Families (TANF)	572
7	Tribal TANF	2
8	Medicaid/Medi-Cal for Families	1,318
9	Healthy Families A&B	311
10	National School Lunch Program (NSLP) - Free Lunch	777
11	Low-income Home Energy Assistance Program (LIHEAP)	1
12	Bureau of Indian Affairs General Assistance	-
13	Head Start Income Eligible - (Tribal Only)	-
14	Other (specify)	-
15	<sup>[1]</sup> 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
	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b>					
	<b>ESA Table 15</b>					
	<b>Lighting</b>					
	<b>Southern California Edison</b>					
1	<b>ESA Program CFL Tracking Table</b>					
2						
3						
4	<i>Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each</i>					
5	<b>Bulb Name / Identification</b>	<b>Bulb Description (wattage, lumens)</b>	<b>Bulb Cost (material)</b>	<b>Admin Cost (overhead, contractor fee, marketing, etc.)</b>	<b>Total Bulb Cost (material + admin)</b>	<b>AB 1109 Compliant? <sup>[1]</sup></b>
6	Autocell Electronics, Inc.	13 Watt - CFL	1.68	5	6.68	Yes
7	Autocell Electronics, Inc.	19 Watt - CFL	2.11	5	7.11	Yes
8	Autocell Electronics, Inc.	23 Watt - CFL	2.18	5	7.18	Yes
9						
10						
11	<b>Year</b> 2013	<b>Number of Homes Treated in ESA Program</b> 69,031	<b>Number of Homes Provided CFLs</b> 59,455	<b>Avg. # of CFL bulbs given per home</b> 4.38	<b>Est. total energy savings from installed CFLs <sup>[2]</sup></b> 6,564,968	
12						
13						
14						
15	<sup>[1]</sup> Compliant in regards to:					
16	1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?					
17	2) Do all models comply with Europe's RoHS standards on toxicity?					
17	<sup>[2]</sup> Energy savings used are from the Load Impact Evaluation of the 2009 Energy Savings Assistance Program.					

	A	B	C	D	E	F	G	H
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b>							
2	<b>ESA Table 16</b>							
	<b>"Add Back" Measures</b>							
	<b>Southern California Edison</b>							
3			<b>Ratio of Benefits Over Costs</b>					
	<b>Measure</b>	<b>Climate Zone</b>	<b>Utility Cost Test</b>	<b>Modified Participant Test</b>	<b>Total Resource Cost Test</b>	<b>Quantity Installed</b>	<b>Budget Impact of "Add Back"</b>	<b>Energy Savings Impact (kWh Annual) <sup>[2]</sup></b>
4	Central Heat Pump - Multi-Family Zone 15	15	0.48	0.49	0.35	3	\$ 9,144	2,024
5	Central Heat Pump - Single Family Zone 15	15	0.36	0.34	0.27	32	\$ 99,601	18,794
6	Central Air Conditioning - Mobile Home Zone 14	14	N/A	N/A	N/A	121	\$ 466,332	-
7	Central Air Conditioning - Mobile Home Zone 15	15	N/A	N/A	N/A	89	\$ 341,910	-
8	Central Air Conditioning - Multi-Family Zone 14	14	N/A	N/A	N/A	60	\$ 232,356	-
9	Central Air Conditioning - Multi-Family Zone 15	15	N/A	N/A	N/A	113	\$ 433,943	-
10	Central Air Conditioning - Single Family Zone 14	14	0.06	0.04	0.05	2,340	\$ 9,032,821	179,033
11	Central Air Conditioning - Single Family Zone 15	15	0.11	0.07	0.09	455	\$ 1,757,333	69,952
12	Room Air Conditioner - Mobile Home Zone 10	10	N/A	N/A	N/A	49	\$ 36,701	-
13	Room Air Conditioner - Mobile Home Zone 13	13	N/A	N/A	N/A	28	\$ 20,972	-
14	Room Air Conditioner - Mobile Home Zone 14	14	N/A	N/A	N/A	24	\$ 17,976	-
15	Room Air Conditioner - Mobile Home Zone 15	15	N/A	N/A	N/A	13	\$ 9,737	-
16	Room Air Conditioner - Multi-Family Zone 10	10	N/A	N/A	N/A	19	\$ 14,131	-
17	Room Air Conditioner - Multi-Family Zone 13	13	N/A	N/A	N/A	1	\$ 749	-
18	Room Air Conditioner - Multi-Family Zone 14	14	N/A	N/A	N/A	1	\$ 749	-
19	Room Air Conditioner - Multi-Family Zone 15	15	N/A	N/A	N/A	-	\$ -	-
20	Room Air Conditioner - Single Family Zone 10	10	0.16	0.11	0.13	260	\$ 194,589	17,948
21	Room Air Conditioner - Single Family Zone 13	13	0.14	0.1	0.12	195	\$ 146,490	11,729
22	Room Air Conditioner - Single Family Zone 14	14	0.19	0.12	0.16	70	\$ 52,430	5,331
23	Room Air Conditioner - Single Family Zone 15	15	0.35	0.24	0.3	23	\$ 17,227	3,536
24	Central AC Maintenance - Mobile Home Zone 14	14	0.21	0.14	0.18	41	\$ 5,330	1,066
25	Central AC Maintenance - Mobile Home Zone 15	15	0.2	0.14	0.17	36	\$ 4,680	936
26	Central AC Maintenance - Multi-Family Zone 14	14	0.22	0.15	0.18	9	\$ 1,170	243
27	Central AC Maintenance - Multi-Family Zone 15	15	0.21	0.15	0.18	6	\$ 780	162
28	Central AC Maintenance - Single Family Zone 14	14	1.11	0.76	0.94	519	\$ 67,470	105,876
29	Central AC Maintenance - Single Family Zone 15	15	1.08	0.76	0.91	93	\$ 12,090	18,972
30	Envelope & Air Sealing - Mobile Home 6	6	N/A	N/A	N/A	1	\$ 100	-
31	Envelope & Air Sealing - Mobile Home 8	8	1.58	1.23	1.3	1	\$ 62	75
32	Envelope & Air Sealing - Mobile Home 10	10	1.81	1.45	1.48	7	\$ 434	674
33	Envelope & Air Sealing - Mobile Home 14	14	0.75	0.57	0.62	6	\$ 1,408	639
34	Envelope & Air Sealing - Mobile Home 15	15	1.41	1.09	1.16	7	\$ 373	378
35	Envelope & Air Sealing - Multi Family 6	6	0.43	0.34	0.35	32	\$ 4,849	1,216
36	Envelope & Air Sealing - Multi Family 8	8	0.67	0.52	0.55	88	\$ 11,057	4,448
37	Envelope & Air Sealing - Multi Family 9	9	1.24	0.94	1.02	103	\$ 9,133	7,674
38	Envelope & Air Sealing - Multi Family 10	10	1.48	1.18	1.21	112	\$ 9,415	10,779
39	Envelope & Air Sealing - Multi Family 13	13	1.74	1.37	1.42	5	\$ 344	491
40	Envelope & Air Sealing - Multi Family 14	14	2.71	2.07	2.24	22	\$ 790	2,345
41	Envelope & Air Sealing - Multi Family 15	15	2.69	2.07	2.22	16	\$ 1,176	3,475
42	Envelope & Air Sealing - Single Family 6	6	0.28	0.22	0.23	25	\$ 6,026	950
43	Envelope & Air Sealing - Single Family 8	8	0.50	0.39	0.41	40	\$ 7,000	2,022
44	Envelope & Air Sealing - Single Family 9	9	0.98	0.75	0.81	31	\$ 3,708	2,310
45	Envelope & Air Sealing - Single Family 10	10	1.41	1.13	1.15	45	\$ 4,052	4,331
46	Envelope & Air Sealing - Single Family 13	13	0.96	0.76	0.79	9	\$ 1,387	883
47	Envelope & Air Sealing - Single Family 14	14	1.04	0.79	0.86	52	\$ 8,241	5,542
48	Envelope & Air Sealing - Single Family 15	15	2.28	1.76	1.88	25	\$ 2,530	5,429
49	Envelope & Air Sealing - Single Family 16	16	0.93	0.74	0.76	5	\$ 394	242
50								
51	<sup>[1]</sup> Dollars spent on these Add Back Measures							
52	<sup>[2]</sup> 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.							
53	<sup>[3]</sup> Central A/C Service added back by Commission policy in D.12-08-044 Ordering Paragraph 52.							
	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).							



A	B	C	D	E	F	G	H
<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b>							
<b>CARE Table 1</b>							
<b>Overall Program Expenses</b>							
<b>Southern California Edison</b>							
1							
2	<b>Category</b>	<b>Overall</b>		<b>Authorized Budget</b>	<b>% of Budget Spent</b>	<b>Total Shifted<sup>[1]</sup></b>	<b>Shifted to/from?</b>
3		<b>Electric</b>	<b>Gas</b>				
4	Outreach	\$1,656,337	-	\$1,656,337	78.9%	-	-
5	Processing, Certification, Recertification	\$777,585	-	\$777,585	17.1%	-	-
6	Post Enrollment Verification	\$484,391	-	\$484,391	14.0%	\$154,766	To Pilots
7	IT Programming	\$735,458	-	\$735,458	77.4%	-	-
8	Cool Centers	N/A	-	N/A	N/A	-	-
	Pilots [2]						From Post Enrollment Verification
9		\$154,766	-	\$154,766	-	\$154,766	
10	Measurement & Evaluation	\$167,918	-	\$167,918	186.6%	\$77,918	From General Administration
11	Regulatory Compliance	\$202,368	-	\$202,368	76.4%	-	-
	General Administration	\$548,305	-	\$548,305	78.1%	\$77,918	To Measurement & Evaluation
12		\$0	-	\$0	0.0%	-	-
13	CPUC Energy Division						
14							
15	<b>TOTAL Program Costs</b>	<b>\$4,727,129</b>	<b>-</b>	<b>\$4,727,129</b>	<b>38.6%</b>	<b>-</b>	<b>-</b>
16							
17	CARE Rate Discount	\$358,025,586	-	\$358,025,586	95.0%	-	-
18	Service Establishment Charge Discount	-	-	-	-	-	-
19							
20	<b>TOTAL PROGRAM COSTS &amp; CUSTOMER DISCOUNTS</b>	<b>\$362,752,715</b>	<b>-</b>	<b>\$362,752,715</b>	<b>93.2%</b>	<b>-</b>	<b>-</b>
21							
22	[1] SCE shifted funds from General Administration to Measurement & Evaluation to fund estimates of CARE eligibility. SCE shifted funds from Post Enrollment Verification to fund the CHANGES pilot.						
23	[2] CHANGES pilot						

		A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y																																																																							
		PY 2013 Energy Savings Assistance and CARE Programs Annual Report																																																																																															
		CARE Table 2																																																																																															
		Enrollment, Recertification, Attrition, & Penetration																																																																																															
		Southern California Edison																																																																																															
1	2	New Enrollment												Recertification <sup>(1)</sup>										Attrition				Enrollment																																																																					
		Self-Certification (Income or Categorical)												Automatic										Failed PEV				Failed Recertification				Total Attrition (P-Q-R-S)				Gross Adjusted (K-T)				Total CARE Participants				Estimated CARE Eligible				Penetration Rate % (W/X)																																																	
3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
2013	Inter-Utility <sup>(1)</sup>	Intra-Utility <sup>(2)</sup>	Automatic Enrollment <sup>(3)</sup>	Leaving <sup>(4)</sup>	Combined (B+C+D)	Online	Paper	Phone	Combined (F+G+H)	Capitation <sup>(4)</sup>	Total New Enrollment (E+J+K)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response	Failed PEV	Failed Recertification	Other	Total Attrition (P-Q-R-S)	Gross (K+O)	Net Adjusted (K-T)	Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)																																																																								
1	2,270	413	0	0	2,683	5,937	9,951	8,215	24,103	188	26,974	22,916	17,402	0	40,318	18,945	95	1,486	12,718	33,244	67,292	-6,270	1,395,782	1,414,772	89.7%																																																																								
2	2,573	511	0	0	3,084	4,384	7,880	5,673	18,137	170	21,391	19,473	18,815	0	38,288	12,034	153	1,229	13,455	26,871	59,679	-5,480	1,390,302	1,414,772	89.3%																																																																								
3	2,031	370	0	0	2,401	3,733	11,068	4,506	19,327	241	21,969	23,551	16,980	0	40,531	9,083	277	1,732	16,214	27,306	62,500	-5,337	1,384,965	1,414,772	87.9%																																																																								
4	3,169	359	0	0	3,528	3,570	9,174	4,268	17,012	243	20,783	25,204	15,126	0	40,330	11,082	236	1,745	18,055	31,116	61,113	-10,335	1,374,630	1,417,557	97.0%																																																																								
5	2,639	456	0	0	3,095	3,759	11,891	4,100	19,750	286	23,131	21,138	14,179	0	35,317	18,075	255	1,694	11,952	31,976	58,448	-8,845	1,365,785	1,417,557	96.3%																																																																								
6	4,050	513	0	0	4,563	4,408	11,187	4,677	20,272	393	25,228	21,505	18,858	0	38,363	13,948	185	1,279	19,134	34,546	63,591	-9,318	1,356,467	1,417,557	95.7%																																																																								
7	2,233	591	0	0	2,824	5,717	12,177	6,774	24,688	375	27,867	23,363	14,054	0	37,437	18,078	217	1,260	13,540	33,095	65,304	-5,228	1,351,239	1,417,557	95.3%																																																																								
8	1,990	265	0	0	2,255	5,430	11,359	7,026	23,815	594	26,664	23,462	15,535	0	39,967	12,180	203	1,324	14,438	28,145	65,661	-1,481	1,345,758	1,417,557	95.2%																																																																								
9	5,476	467	0	0	5,943	5,860	4,705	7,900	17,955	351	24,249	20,265	33,763	0	54,028	13,718	106	1,110	13,599	28,633	78,277	-4,284	1,345,474	1,417,557	94.9%																																																																								
10	3,266	697	0	0	3,963	4,744	7,450	6,463	18,657	330	22,960	22,900	18,809	0	41,709	15,443	103	1,752	20,650	37,648	64,659	-14,698	1,330,776	1,417,557	93.9%																																																																								
11	3,220	868	0	0	4,088	3,317	5,428	5,097	13,842	283	18,213	21,106	15,394	0	36,500	9,913	62	1,241	21,489	32,883	54,713	-14,472	1,316,304	1,417,557	92.8%																																																																								
12	3,904	230	0	0	4,134	3,474	4,587	5,419	24,480	333	28,947	23,000	18,347	0	41,347	14,645	76	1,590	6,687	9,844	70,294	19,303	1,335,607	1,410,534	94.7%																																																																								
13	35,821	5,740	-	-	42,561	54,333	117,877	69,888	242,018	3,787	288,366	287,903	215,262	-	483,165	166,844	1,968	17,442	168,557	354,811	771,531	-66,445	1,335,607	1,410,534	94.7%																																																																								

19 <sup>(1)</sup> Enrollments via data sharing between the IOUs.  
20 <sup>(2)</sup> Enrollments via data sharing between departments and/or programs within the utility. Includes HEAP payment data file from Accounts Payable Dept.  
21 <sup>(3)</sup> Enrollments via data sharing with programs outside the IOU that serve low-income customers.  
22 <sup>(4)</sup> Not including Recertification.  
23 <sup>(5)</sup> Recertification results are tied to the month initiated. Therefore, recertification results may be pending due to the time permitted for a participant to respond.

	A	B	C	D	E	F	G	H	I
<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b>									
<b>CARE Table 3A</b>									
<b>Post-Enrollment Verification Results (Model) 2013</b>									
<b>Southern California Edison</b>									
1									
2	2013	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) <sup>(1)</sup>	Total Households De-Enrolled <sup>(2)</sup>	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-Enrolled
3	January	1,395,782	7,810	0.56%	4,261	289	4,550	58.26%	0.33%
4	February	1,390,302	7,846	0.56%	4,161	177	4,338	55.29%	0.31%
5	March	1,384,965	7,741	0.56%	4,228	267	4,495	58.07%	0.32%
6	April	1,374,630	6,124	0.45%	3,260	233	3,493	57.04%	0.25%
7	May	1,365,785	5,596	0.41%	3,239	204	3,443	61.53%	0.25%
8	June	1,356,467	11,523	0.85%	6,340	281	6,621	57.46%	0.49%
9	July	1,351,239	3,913	0.29%	2,135	176	2,311	59.06%	0.17%
10	August	1,349,758	186	0.01%	92	2	94	50.54%	0.01%
11	September	1,345,474	5,471	0.41%	3,607	153	3,760	68.73%	0.28%
12	October	1,330,776	83	0.01%	31	2	33	39.76%	0.00%
13	November	1,316,304	4,804	0.36%	3,498	87	3,585	74.63%	0.27%
14	December	1,335,607	7,322	0.55%	4,832	145	4,977	67.97%	0.37%
15	<b>YTD Total</b>	<b>1,335,607</b>	<b>68,419</b>	<b>5.12%</b>	<b>39,684</b>	<b>2,016</b>	<b>41,700</b>	<b>60.95%</b>	<b>3.12%</b>
16									
17									
18									
19									
20									
21									

<sup>(1)</sup> Includes customers verified as over income or who requested to be de-enrolled.

<sup>(2)</sup> Verification results are tied to the month initiated. Therefore, verification results may be pending due to the time permitted for a participant to respond.

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
<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b>									
<b>CARE Table 3B</b>									
<b>Post-Enrollment Verification Results (High Usage) 2013</b>									
<b>Southern California Edison</b>									
22									
23	2013	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) <sup>(1)</sup>	Total Households De-Enrolled <sup>(2)</sup>	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-Enrolled
24	January	1,395,782	0	0.00%	0	0	0	0.00%	0.00%
25	February	1,390,302	0	0.00%	0	0	0	0.00%	0.00%
26	March	1,384,965	0	0.00%	0	0	0	0.00%	0.00%
27	April	1,374,630	0	0.00%	0	0	0	0.00%	0.00%
28	May	1,365,785	0	0.00%	0	0	0	0.00%	0.00%
29	June	1,356,467	0	0.00%	0	0	0	0.00%	0.00%
30	July	1,351,239	0	0.00%	0	0	0	0.00%	0.00%
31	August	1,349,758	0	0.00%	0	0	0	0.00%	0.00%
32	September	1,345,474	0	0.00%	0	0	0	0.00%	0.00%
33	October	1,330,776	0	0.00%	0	0	0	0.00%	0.00%
34	November	1,316,304	0	0.00%	0	0	0	0.00%	0.00%
35	December	1,335,607	275	0.02%	249	6	255	92.73%	0.02%
36	<b>YTD Total</b>	<b>1,335,607</b>	<b>275</b>	<b>0.02%</b>	<b>249</b>	<b>6</b>	<b>255</b>	<b>92.73%</b>	<b>0.02%</b>
37									
38									
39									
40									

<sup>(1)</sup> Includes customers verified as over income or who requested to be de-enrolled.

<sup>(2)</sup> Verification results are tied to the month initiated. Therefore, verification results may be pending due to the time permitted for a participant to respond.

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
	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b> <b>CARE Table 4</b> <b>CARE Self-Certification and Self-Recertification Applications</b> <b>Southern California Edison</b>						
1							
2		<b>Provided</b> <sup>[2]</sup>	<b>Received</b>	<b>Approved</b>	<b>Denied</b> <sup>[4]</sup>	<b>Pending/Never Completed</b> <sup>[5]</sup>	<b>Duplicates</b>
3	<b>Total</b> <sup>[1]</sup>	3,987,190	809,951	753,249	32,334	148,800	24,615
4	<b>Percentage</b> <sup>[3]</sup>	N/A	100.00%	93.00%	3.99%	N/A	3.04%
5							
6	<sup>[1]</sup> Includes sub-metered customers.						
7	<sup>[2]</sup> Includes number of applications SCE provided for all direct mailing campaigns, customer calls made to the call center, and other outreach methods. Because there are other means by which customers obtain applications which are not counted, this number is						
8	<sup>[3]</sup> Percent of received applications.						
9	<sup>[4]</sup> Includes all applications received and not approved.						
10	<sup>[5]</sup> Includes pending recertification responses.						



	A	B	C	D	E	F	G	H
	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b>							
	<b>CARE Table 6</b>							
	<b>CARE Recertification Results</b>							
	<b>Southern California Edison</b>							
1								
2		<b>Total CARE Population</b>	<b>Participants Requested to Recertify</b>	<b>% of Population Total</b>	<b>Participants Recertified</b>	<b>Participants Dropped <sup>[1]</sup></b>	<b>Recertification Rate % (E/C)</b>	<b>% of Total Population Dropped (F/B)</b>
3	<b>January</b>	1,395,782	37,019	2.7%	22,916	14,099	61.9%	1.0%
4	<b>February</b>	1,390,302	32,134	2.3%	19,473	12,660	60.6%	0.9%
5	<b>March</b>	1,384,965	39,746	2.9%	23,551	16,189	59.3%	1.2%
6	<b>April</b>	1,374,630	41,134	3.0%	25,204	15,925	61.3%	1.2%
7	<b>May</b>	1,365,785	32,902	2.4%	21,138	11,758	64.2%	0.9%
8	<b>June</b>	1,356,467	34,222	2.5%	21,505	12,707	62.8%	0.9%
9	<b>July</b>	1,351,239	37,579	2.8%	23,383	14,105	62.2%	1.0%
10	<b>August</b>	1,349,758	37,768	2.8%	23,462	14,214	62.1%	1.1%
11	<b>September</b>	1,345,474	32,992	2.5%	20,265	12,708	61.4%	0.9%
12	<b>October</b>	1,330,776	37,239	2.8%	22,900	14,236	61.5%	1.1%
13	<b>November</b>	1,316,304	34,502	2.6%	21,106	13,334	61.2%	1.0%
14	<b>December</b>	1,335,607	36,579	2.7%	23,000	12,094	62.9%	0.9%
15	<b>YTD Total</b>	<b>1,335,607</b>	<b>433,816</b>	<b>32.5%</b>	<b>267,903</b>	<b>164,029</b>	<b>61.8%</b>	<b>12.3%</b>
16								
17	<sup>[1]</sup> Recertification results are tied to the month initiated. Therefore, recertification results may be pending due to the time permitted for a participant to respond.							

	A	B	C	D	E	F	G	H
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report CARE Table 7 CARE Capitation Contractors Southern California Edison</b>							
2	<b>Contractor Name <sup>[1]</sup></b>	<b>Contractor Type (Check one or more if applicable)</b>				<b>Enrollments <sup>[3]</sup></b>		
3		Private	CBO	WMDVBE <sup>[2]</sup>	LIHEAP	Rural	Urban	Total
4	2-1-1 Orange County		X					0
5	Alpha Enterprises	X					112	112
6	Antelope Valley Boys & Girls Club		X	X				0
7	APAC Service Center	X				2	202	204
8	Armenian Relief Society		X	X				0
9	Asian American Drug Abuse Program		X				18	18
10	Asian American Resource Center		X	X			6	6
11	Asian Youth Center		X					0
12	Best Buy Co., Inc. ( 113-SantaClarita)	X		X				0
13	Best Buy Co., Inc. ( 114-Fullerton)	X		X				0
14	Best Buy Co., Inc. (1009-LongBeach)	X		X				0
15	Best Buy Co., Inc. (1011-EISegundo)	X		X				0
16	Best Buy Co., Inc. (1018-Glendora)	X		X				0
17	Best Buy Co., Inc. (1020-LaQuinta)	X		X				0
18	Best Buy Co., Inc. (102-W Covina)	X		X				0
19	Best Buy Co., Inc. (103-City of Industry)	X		X				0
20	Best Buy Co., Inc. (104-Hawthorne)	X		X				0
21	Best Buy Co., Inc. (105-R.Cucamonga)	X		X				0
22	Best Buy Co., Inc. (106-Palmdale)	X		X				0
23	Best Buy Co., Inc. (1076-Temecula)	X		X				0
24	Best Buy Co., Inc. (107-Torrance)	X		X				0
25	Best Buy Co., Inc. (108-Victorville)	X		X				0
26	Best Buy Co., Inc. (109-W. LA)	X		X				0
27	Best Buy Co., Inc. (110-Riverside)	X		X				0
28	Best Buy Co., Inc. (1119-Signal Hill)	X		X				0
29	Best Buy Co., Inc. (111-Westminster)	X		X			1	1
30	Best Buy Co., Inc. (112-ThousandOaks)	X		X				0
31	Best Buy Co., Inc. (1150-Ontario)	X		X				0
32	Best Buy Co., Inc. (115-Murrieta)	X		X				0
33	Best Buy Co., Inc. (116-CanogaPark)	X		X				0
34	Best Buy Co., Inc. (117-Cerritos)	X		X				0
35	Best Buy Co., Inc. (1180-Northridge)	X		X				0
36	Best Buy Co., Inc. (118-Oxnard)	X		X				0
37	Best Buy Co., Inc. (1198-Orange-Tustin)	X		X				0
38	Best Buy Co., Inc. (119-Costa Mesa)	X		X				0
39	Best Buy Co., Inc. (124-PalmDesert)	X		X				0
40	Best Buy Co., Inc. (125-Pasadena)	X		X				0
41	Best Buy Co., Inc. (126-YorbaLinda)	X		X				0
42	Best Buy Co., Inc. (127-Lakewood)	X		X				0
43	Best Buy Co., Inc. (130-PorterRnch)	X		X				0
44	Best Buy Co., Inc. (131-Montclair)	X		X				0
45	Best Buy Co., Inc. (1391-Goleta)	X		X				0
46	Best Buy Co., Inc. (1409-Menifee)	X		X				0
47	Best Buy Co., Inc. (1430-MorenoVly)	X		X				0
48	Best Buy Co., Inc. (1432-Compton)	X		X				0
49	Best Buy Co., Inc. (1441-Beaumont)	X		X				0
50	Best Buy Co., Inc. (1472-Tustin)	X		X				0
51	Best Buy Co., Inc. (1482-AppleValley)	X		X				0
52	Best Buy Co., Inc. (150-SanBernardino)	X		X				0
53	Best Buy Co., Inc. (1510-ClvrCty Mall)	X		X				0
54	Best Buy Co., Inc. (1511-Pacomia)	X		X				0
55	Best Buy Co., Inc. (1537-Montebello)	X		X				0
56	Best Buy Co., Inc. (179-CulverCty)	X		X				0
57	Best Buy Co., Inc. (183-Glendale)	X		X				0
58	Best Buy Co., Inc. (2514-Fullerton)	X		X				0

	A	B	C	D	E	F	G	H
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b> <b>CARE Table 7</b> <b>CARE Capitation Contractors</b> <b>Southern California Edison</b>							
2	Contractor Name <sup>[1]</sup>	Contractor Type (Check one or more if applicable)				Enrollments <sup>[3]</sup>		
3		Private	CBO	WMDVBE <sup>[2]</sup>	LIHEAP	Rural	Urban	Total
59	Best Buy Co., Inc. (367-Westwood)	X		X				0
60	Best Buy Co., Inc. (392-CynSprings)	X		X				0
61	Best Buy Co., Inc. (393-W.Hollywood)	X		X				0
62	Best Buy Co., Inc. (529-Visalia)	X		X				0
63	Best Buy Co., Inc. (649-SimiValley)	X		X				0
64	Best Buy Co., Inc. (764-ShermanOaks)	X		X				0
65	Best Buy Co., Inc. (774-Tustin)	X		X				0
66	Best Buy Co., Inc. (775-MiraLoma)	X		X				0
67	Best Buy Co., Inc. (846-ChinoHills)	X		X				0
68	Best Buy Co., Inc. (847-Corona)	X		X				0
69	Best Buy Co., Inc. (854-Irvine)	X		X				0
70	Best Buy Co., Inc. (872-Downey)	X		X				0
71	Best Buy Co., Inc. (947-Orange)	X		X				0
72	Best Buy Stores, LP (1782-Duarte)	X		X				0
73	Best Partners (AKA: Energy Conservation Consultants, Inc - ECC)	X		X		52	1,052	1,104
74	Bethel Baptist Church		X				2	2
75	Bishop Paiute Tribe	X				14		14
76	Boys & Girls Club of Stanton		X					0
77	Boys and Girls Club of San Gabriel Valley		X				1	1
78	Cambodian Family, The		X					0
79	Cap of San Bernardino Cty		X		X	8	27	35
80	Caregivers: Volunteers Assisting The Elderly		X					0
81	Catholic Charities - Los Angeles		X					0
82	Center for Successful Aging		X					0
83	Chinese Christian Herald Crusades		X				17	17
84	Chino Neighborhood House		X					0
85	Christ Our Redeemer Community Development Corporation		X					0
86	Christ Unity Center		X					0
87	CitiHousing Real Estate Services	X						0
88	Citrus Valley Health Partners		X			1	36	37
89	City Impact		X					0
90	City of Beaumont Senior Center		X	X				0
91	Comm Action of Venture County		X		X		6	6
92	Community Action Partnership of Riverside County				X	10	5	15
93	Community Center at Tierra del Sol							0
94	Community Pantry					3	5	8
95	Community Settlement Association		X					0
96	Corona-Norco Family YMCA		X				13	13
97	Costa Mesa Comm Foundation		X				2	2
98	Council on Aging - Orange County (HICAP)		X					0
99	Crisis Ministry Church of Vly		X			4	1	5
100	Cross Connexion	X						0
101	Desert Arc		X			1	2	3
102	Desert Manna Ministries, Inc.		X				2	2
103	Disabled Resources Center, Inc.		X	X				0
104	El Conicilio Family Services		X	X			2	2
105	Faith Temple Church		X					0
106	FAME - Seeds of Faith							0
107	Family Service Association							0
108	Family Service Association of Redlands						1	1
109	Food Share		X				2	2
110	Go! The Calendar Stop	X					1,955	1,955
111	Heart of Compassion		X				1	1
112	Help of Ojai, Inc.		X				1	1
113	High Desert Domestic Violence Program, Inc.		X					0





	A	B	C	D	E	F	G	H
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b> <b>CARE Table 7</b> <b>CARE Capitation Contractors</b> <b>Southern California Edison</b>							
2		<b>Contractor Type</b> <b>(Check one or more if applicable)</b>				<b>Enrollments <sup>[3]</sup></b>		
3		<b>Contractor Name <sup>[1]</sup></b>	<b>Private</b>	<b>CBO</b>	<b>WMDVBE <sup>[2]</sup></b>	<b>LIHEAP</b>	<b>Rural</b>	<b>Urban</b>
166	<sup>[1]</sup> All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.							
167	<sup>[2]</sup> WMDVBE status based on verbal confirmation from agency. No status (blanks) applied for agencies that were unable to be reached.							
168	<sup>[3]</sup> 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
	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b>							
	<b>CARE Table 8</b>							
1	<b>CARE Participants per Month Southern California Edison</b>							
2	<b>2013</b>	<b>Gas and Electric</b>	<b>Gas Only</b>	<b>Electric Only</b>	<b>Total</b>	<b>Eligible Households</b>	<b>Penetration Rate</b>	<b>% Change <sup>[1]</sup></b>
3	<b>January</b>	-	-	1,395,782	1,395,782	1,414,772	99%	0.0%
4	<b>February</b>	-	-	1,390,302	1,390,302	1,414,772	98%	-0.4%
5	<b>March</b>	-	-	1,384,965	1,384,965	1,414,772	98%	-0.4%
6	<b>April</b>	-	-	1,374,630	1,374,630	1,417,557	97%	-0.7%
7	<b>May</b>	-	-	1,365,785	1,365,785	1,417,557	97%	-0.6%
8	<b>June</b>	-	-	1,356,467	1,356,467	1,417,557	96%	-0.7%
9	<b>July</b>	-	-	1,351,239	1,351,239	1,417,557	96%	-0.4%
10	<b>August</b>	-	-	1,349,758	1,349,758	1,417,557	95%	-0.3%
11	<b>September</b>	-	-	1,345,474	1,345,474	1,417,557	95%	-0.1%
12	<b>October</b>	-	-	1,330,776	1,330,776	1,417,557	94%	-1.0%
13	<b>November</b>	-	-	1,316,304	1,316,304	1,417,557	93%	-1.1%
14	<b>December</b>	-	-	1,335,607	1,335,607	1,410,534	94%	1.5%
15								
16	[1] In 2013, SCE did not experience any monthly variances of 5% or more in the number of participants.							

	A	B	C	D
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report CARE Table 9 CARE Average Monthly Usage &amp; Bill Southern California Edison</b>			
2	<b>Average Monthly Gas / Electric Usage <sup>[1]</sup></b>			
3	<b>Residential Non-CARE vs. CARE Customers</b>			
4				
5	<b>Customer</b>	<b>Gas Therms</b>	<b>Gas Therms</b>	<b>Total</b>
6		<b>Tier 1</b>	<b>Tier 2</b>	
7	Non-CARE	95	7	102
8	CARE	16	2	18
9				
10	<b>Customer</b>	<b>Electric KWh</b>	<b>Electric KWh</b>	<b>Total</b>
11		<b>Tier 1</b>	<b>Tier 2</b>	
12	Non-CARE	304	296	600
13	CARE	325	206	531
14				
15				
16	<b>Average Monthly Gas / Electric Bill</b>			
17	<b>Residential Non-CARE vs. CARE Customers<sup>1</sup></b>			
18	<b>(Dollars per Customer)</b>			
19	<b>Customer</b>	<b>Gas</b>	<b>Electric</b>	
20	Non-CARE	\$69.51	\$107.87	
21	CARE <sup>[2]</sup>	\$55.31	\$63.22	
22				
23	<sup>[1]</sup> Excludes master-meter usage.			
24	<sup>[2]</sup> After CARE Discount.			

	A	B	C	D	E	F
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report CARE Table 10 CARE Surcharge &amp; Revenue Southern California Edison</b>					
2						
3	<b>Electric</b>					
4	<b>CARE Surcharge and Revenue Collected by Customer Class</b>					
5	<b>Customer Class</b>	<b>Average Monthly</b>		<b>CARE Surcharge as Percent of Bill</b>	<b>Total CARE Surcharge Revenue Collected</b>	<b>Percentage of CARE Surcharge Revenue Collected</b>
6		<b>CARE Surcharge</b>	<b>Monthly Bill</b>			
7						
8	Residential <sup>[1]</sup>	\$8,817,146	\$414,827,420	2.13%	\$105,805,754	27.57%
9	Agricultural	\$757,478	\$18,984,140	3.99%	\$9,089,742	2.37%
10	Commercial	\$16,971,970	\$436,438,703	3.89%	\$203,663,643	53.08%
11	Industrial	\$3,545,226	\$59,128,472	6.00%	\$42,542,710	11.09%
12	Public Authority	\$1,851,376	\$44,482,117	4.16%	\$22,216,515	5.79%
13	Railroads	\$33,410	\$937,018	3.57%	\$400,920	0.10%
14	Interdepartmental <sup>[2]</sup>	\$0	\$18,512	0.00%	\$0	0.00%
15						
16	<sup>[1]</sup> Excludes CARE customers					
17	<sup>[2]</sup> Electricity supplied for Edison-owned water & gas operations on Santa Catalina Island					
18						
19	<b>Gas</b>					
20	<b>CARE Surcharge and Revenue Collected by Customer Class</b>					
21	<b>Customer Class</b>	<b>Average Monthly</b>		<b>CARE Surcharge as Percent of Bill</b>	<b>Total CARE Surcharge Revenue Collected</b>	<b>Percentage of CARE Surcharge Revenue Collected</b>
22		<b>CARE Surcharge</b>	<b>Monthly Bill</b>			
23						
24	Residential	\$1.76	\$124.78	1.41%	\$716.55	46.72%
25	Commercial	\$68.10	\$1,172.37	5.81%	\$817.18	53.28%
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	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b> <b>CARE Table 11</b> <b>CARE Capitation Applications</b> <b>Southern California Edison</b>					
2	<b>Entity <sup>(1)</sup></b>	<b>Total Received</b>	<b>Approved</b>	<b>Denied</b>	<b>Pending/ Never Completed</b>	<b>Duplicate</b>
3	ALPHA ENTERPRISE	596	112	264	7	213
4	APAC SERVICE CENTER	271	204	2	2	63
5	ASIAN AMERICAN DRUG ABUSE PROG	39	18			21
6	ASIAN AMERICAN RESOURCE CENTER	9	6	2		1
7	ASIAN YOUTH CENTER	3				3
8	BEST BUY CO., INC. (111)	1	1			0
9	BEST PARTNERS	966	953		13	0
10	BETHEL BAPTIST CHURCH	3	2	1		0
11	BISHOP PAIUTE TRIBE	14	14			0
12	BOYS&GIRLS CLUB OF SAN GABRIEL	1	1			0
13	CAP OF SAN BERNARDINO CTY	45	35	1	5	4
14	CHINESE CHRISTIAN HERALD CRUS.	23	17	2		4
15	CITRUS VALLEY HEALTH PARTNERS	83	37	10	2	34
16	CITY OF BEAUMONT SENIOR CENTER	3				3
17	CITY OF REFUGE RESCUE OUTREACH	1				1
18	COMM ACTION OF VENTURA COUNTY	9	6	1		2
19	COMMUNITY PANTRY	23	8	2		13
20	CORONA NORCO FAMILY YMCA	25	13	3		9
21	COSTA MESA COMM FOUNDATION	9	2	3		4
22	COUNCIL ON AGING-ORANGE COUNTY	2		1		1
23	CRISIS MINISTRY CHURCH OF VLY	8	5			3
24	DESERT ARC	7	3	1		3
25	DESERT MANNA MINISTRIES INC	7	2			5
26	EL CONCILIO DEL CONDADO DE	2	2			0
27	ENERGY CONSERV CONSULTANTS INC	153	151		2	0
28	FAMILY SERVICE ASSOCIATION	1				1
29	FAMILY SVC ASSOC OF REDLANDS	5	1			4
30	FOOD SHARE	4	2			2
31	GO THE CALENDAR STOP	2,083	1,955	11	32	85
32	HEART OF COMPASSION	6	1	1		4
33	HELP OF OJAI, INC.	4	1	2		1
34	HOUSING AUTHORITY OF KINGS CO	4	3			1
35	KERNVILLE UNION SCHOOL DISTRIC	1				1
36	KINGS COMMUNITY ACTION ORG	39	32		7	0
37	KOREAN CHURCHES COMM DEV- KCCD	1				1
38	LTSC COMM. DEVEL. CORP	1	1			0
39	LUTHERAN SOCIAL SVC OF SO CAL	1	1			0
40	MEXICAN AMERICAN OPPORTUNITY	191	28	56	3	104
41	MTN COMM FAM RESOURCE CNTR	9	4	2		3
42	NEW GREATER CIR. MISSION, INC	2	1			1
43	NEW HOPE VILLAGE, INC	4	4			0
44	OCCC	8	6	1		1
45	ONEOC	12	11		1	0
46	OPERATION GRACE	1				1
47	OUR COMMUNITY WORKS	96	88	1	1	6

	A	B	C	D	E	F
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b> <b>CARE Table 11</b> <b>CARE Capitation Applications</b> <b>Southern California Edison</b>					
2	<b>Entity <sup>[1]</sup></b>	<b>Total Received</b>	<b>Approved</b>	<b>Denied</b>	<b>Pending/ Never Completed</b>	<b>Duplicate</b>
48	PACIFIC ISLANDER HLTH (PIHP)	1	1			0
49	PROTEUS, INC.	1	1			0
50	RIVERSIDE DEPT COMM ACTION	38	15	13	4	6
51	SANTA ANITA FAMILY SERVICE	1	1			0
52	SENIOR ADVOCATES OF THE DESERT	2	2			0
53	SHARE OUR SELVES	20	15			5
54	ST VINCENT DE PAUL	5	4		1	0
55	STA BARBARA NGHBORHD CLINICS	1			1	0
56	TELACU RESIDENTIAL MGMT, INC	14	11			3
57	TEMECULA SENIOR CITIZENS CENTE	1				1
58	UNITED CAMBODIAN COMMUNITY INC	1				1
59	VICTOR VALLEY COMM SVC COUNCIL	1				1
60	VICTOR VLY COMM DENTAL SVC PRG	1	1			0
61	VIETNAMESE COMMUNITY OF OC INC	4	3			1
62	VOLUTNEERS OF EAST LOS ANGELES	4	2			2
63	<b>Grand Total</b>	<b>4,871</b>	<b>3,787</b>	<b>380</b>	<b>81</b>	<b>623</b>
64						
65	<sup>[1]</sup> Includes all entities with activity in 2013					

	A	B	C	D	E	F	G
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b> <b>CARE Table 12</b> <b>CARE Expansion Program</b> <b>Southern California Edison</b>						
2	<b>Participating Facilities by Month</b>						
3	<b>2013</b>	<b>Gas</b>			<b>Electric</b>		
4		<b>CARE Residential Facilities</b>	<b>CARE Commercial Facilities</b>	<b>Total Gas</b>	<b>CARE Residential Facilities</b>	<b>CARE Commercial Facilities</b>	<b>Total Electric</b>
5	<b>January</b>	-	-	-	372	164	536
6	<b>February</b>	-	-	-	377	160	537
7	<b>March</b>	-	-	-	403	169	572
8	<b>April</b>	-	-	-	409	167	576
9	<b>May</b>	-	-	-	410	164	574
10	<b>June</b>	-	-	-	410	169	579
11	<b>July</b>	-	-	-	417	170	587
12	<b>August</b>	-	-	-	428	171	599
13	<b>September</b>	-	-	-	416	169	585
14	<b>October</b>	-	-	-	407	174	581
15	<b>November</b>	-	-	-	404	174	578
16	<b>December</b>	-	-	-	402	176	578
17							
18							
19	<b>Average Monthly Gas / Electric Usage <sup>[1]</sup></b>						
20	<b>Customer</b>	<b>Gas</b>		<b>Electric</b>			
21		<b>Therms</b>		<b>KWh</b>			
22	Residential Facilities	N/A		870			
23	Commercial Facilities	N/A		12,249			
24							
25							
26	<b>CARE Expansion Self-Certification and Self-Recertification Applications</b>						
27		<b>Received</b>	<b>Approved</b>	<b>Denied</b>	<b>Pending/Never Completed</b>	<b>Duplicates</b>	
28	Total	284	226	58	-	-	
29	Percentage	-	79.6%	20.4%	-	-	
30							
31							
32	<sup>[1]</sup> Excludes master meter usage.						



	A	B	C	D	E	F	G	H	I	J																														
	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b> <b>CARE Table 13</b> <b>CARE High Usage Verification Results</b> <b>Southern California Edison</b>																																							
1																																								
2	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="4">Stage 1 - IRS Documentation and ESA Agreement</th> <th colspan="3">Stage 2 - ESA Participation</th> <th colspan="3">Stage 3 - Usage Monitoring</th> </tr> <tr> <th>Households Requested to Verify</th> <th>Removed (No Response)</th> <th>Removed (Verified Ineligible) <sup>[1]</sup></th> <th>Income Verified and Referred to ESA</th> <th>Failed and Removed <sup>[2]</sup></th> <th>Ineligible <sup>[3]</sup></th> <th>Completed</th> <th>Removed <sup>[4]</sup></th> <th>Appeals Denied</th> <th>Appeals Approved</th> </tr> </thead> <tbody> <tr> <td>275</td> <td>249</td> <td>6</td> <td>8</td> <td>7</td> <td>1</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>										Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring			Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) <sup>[1]</sup>	Income Verified and Referred to ESA	Failed and Removed <sup>[2]</sup>	Ineligible <sup>[3]</sup>	Completed	Removed <sup>[4]</sup>	Appeals Denied	Appeals Approved	275	249	6	8	7	1	0	0	0	0
Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring																																	
Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) <sup>[1]</sup>	Income Verified and Referred to ESA	Failed and Removed <sup>[2]</sup>	Ineligible <sup>[3]</sup>	Completed	Removed <sup>[4]</sup>	Appeals Denied	Appeals Approved																															
275	249	6	8	7	1	0	0	0	0																															
3																																								
4																																								
5																																								
6	<sup>[1]</sup> Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA.																																							
7	<sup>[2]</sup> Includes customers who declined to participate in ESA, failed to respond to appointment requests, or missed multiple appointments.																																							
8	<sup>[3]</sup> Includes customers who previously participated, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.																																							
9	<sup>[4]</sup> Customers removed for exceeding 600% of baseline in any monthly billing cycle.																																							

	A	B
1	<b>PY 2013 Energy Savings Assistance and CARE Programs Annual Report</b> <b>CARE Table 14</b> <b>Categorical Enrollment</b> <b>Southern California Edison</b>	
2	<b>Type of Enrollment</b>	<b>Number of customers Enrolled <sup>[1]</sup></b>
3	Women, Infants, and Children Program (WIC)	37,901
4	Supplemental Security Income (SSI)	23,181
5	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	53,410
6	CalWORKs/Temporary Assistance for Needy Families (TANF)	-
7	Tribal TANF	7,172
8	Medicaid/Medi-Cal	86,320
9	Healthy Families A&B	9,859
10	National School Lunch Program (NSLP) - Free Lunch	32,697
11	Low-income Home Energy Assistance Program (LIHEAP)	1,008
12	Bureau of Indian Affairs General Assistance	218
13	Head Start Income Eligible - (Tribal Only)	760
14	VRU - State Programs	245
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.	

**Attachment B**

**SCE's FERA Program Annual Report for Program Year 2013**



SOUTHERN CALIFORNIA  
**EDISON**

An *EDISON INTERNATIONAL* Company

**SOUTHERN CALIFORNIA EDISON COMPANY'S (U-338 E)  
REPORT FOR THE FAMILY ELECTRIC RATE ASSISTANCE (FERA) PROGRAM FOR  
THE PERIOD JANUARY - DECEMBER 2013**

**May 1, 2014**

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

**January 1, 2013 through December 31, 2013**

**I. Participant Information**

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

See Table 1.

<b>Table 1</b>		
<b>2013<sup>1</sup></b>	<b>FERA Enrolled</b>	<b>FERA Receiving Tier 3 Benefit</b>
<b>January</b>	24,994	18,880
<b>February</b>	24,791	14,700
<b>March</b>	25,094	15,113
<b>April</b>	25,187	14,761
<b>May</b>	25,095	15,127
<b>June</b>	25,287	14,436
<b>July</b>	25,481	17,625
<b>August</b>	25,648	16,997
<b>September</b>	25,744	18,093
<b>October</b>	25,641	15,329
<b>November</b>	25,469	12,959
<b>December</b>	25,578	16,274

<sup>1</sup> FERA was implemented in June 2004.

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

See Table 2.

<b>Table 2</b>			
<b>FERA Penetration Rate</b>			
<b>2013 Quarter Ending</b>	<b>FERA-Eligible Households</b>	<b>FERA- Participating Households</b>	<b>FERA Household Penetration Rate<sup>2</sup></b>
March 31	222,352	25,094	11.3%
June 30	222,618	25,287	11.4%
September 30	223,032	25,744	11.5%
December 31	222,643	25,578	11.5%

**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 quarterly penetration estimates for March, June, September, and December 2013.

Sources for this estimation include current year small area vendor distribution on household characteristics, census Public Use Microdata Sample (PUMS) 2008-2012 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 2013. This CARE methodology estimates a

<sup>2</sup> 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, 2013, there were 112 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's normal practice is to mail requested enrollment forms to both the mastermetered customer and the submetered tenant. At recertification anniversary date, a CARE/FERA letter is mailed directly to the submetered tenant. This approach has proven to be more effective than the previous tactic of solely approaching the mobile home park owners/managers.

**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 \$13.89.<sup>3</sup>

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

The cumulative annual discount for all FERA customers was \$4,226,243.31.<sup>4</sup>

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<sup>3</sup> Includes all enrolled customers who received a discount in any month.

<sup>4</sup> 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.

<b>Table 4</b>	
<b>FERA Program Administrative Costs by Category and Benefits</b>	
<b>Category</b>	<b>Cost</b>
<b>Outreach/Marketing</b>	\$ 10,958.06
<b>Processing, Certification, Recertification <sup>[1]</sup></b>	\$ -
<b>Post Enrollment Verification <sup>[1]</sup></b>	\$ -
<b>General Administration <sup>[1]</sup></b>	\$ -
<b>Information Technology</b>	\$ 36,763.19
<b>Capitation</b>	\$ 2,460.06
<b>TOTAL PROGRAM COSTS</b>	<b>\$ 50,181.31</b>
<b>CUSTOMER BENEFITS</b>	<b>\$ 4,226,243.31</b>
<b>TOTAL PROGRAM COSTS &amp; CUSTOMER BENEFITS</b>	<b>\$ 4,276,424.62</b>

[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
<b>Outreach</b>	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.
<b>Processing, Certification, Recertification</b>	Includes: Staff labor, information technology, application processing, training, programming labor, and sub-meter certification.
<b>Post Enrollment Verification</b>	Includes: Staff labor, information technology, verification processing, training, programming labor, and sub-meter verification.
<b>General Administration</b>	Includes: <b>Information Technology/Programming</b> Programming and labor costs associated with system enhancements, compliance, and maintenance of existing processes.  <b>Regulatory Compliance</b> Applications, testimony, advice filings, comments and reply comments, hearings, reports and studies, working group meetings, public input meetings, and tariff revisions.  <b>Other</b> Office supplies, market research, program management labor (including pensions and benefits), and technical support and software licensing.
<b>Startup</b>	Includes: Labor and system programming to implement the program.
<b>Benefits</b>	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 by using separate accounting numbers for each program. To the extent possible, the costs of CARE/FERA activities are allocated in proportion to the work that was attributable to either CARE or FERA, normally a 95/5% split.

**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 increased from 24,461 on December 31, 2012, to 25,578 on December 31, 2013, which represents a net increase of 1,117 households.

FERA outreach was conducted as an adjunct to CARE outreach from January through December 2013 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 online web enrollment application or send out paper applications if requested.

Throughout the year, SCE hosted seven “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 ESA programs, 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.

<b>Date</b>	<b>Location</b>
February 21, 2013	Huntington Park
April 10, 2013	Huntington Beach
June 28, 2013	Carson
July 25, 2013	Pico Rivera
August 2, 2013	Los Angeles
October 24, 2013	San Juan Capistrano
November 13, 2013	Oxnard

In 2013, SCE participated in more than 100 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 Cinco de Mayo Festival in Santa Ana, Edwards Air Force Base Science Fair, Summer Readiness Preparedness events and Southern California Edison Lamp Exchanges, San Jacinto Agricultural, and Los Angeles

County Fairs, more than 29,000 customers received information on CARE/FERA and Energy Savings Assistance (ESA) 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 2014, 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 18 languages.
3. Outreach: CBOs leverage the existing TEAM outreach activities to introduce information about CHANGES, provide new energy-related materials, and market the program via various media outlets.

**SCE's FERA Report**  
**January 1, 2013– December 31, 2013**

Based on the program administrator's monthly reports, CHANGES completed the following activities for SCE (January-December 2013):

<b>Component (in language)</b>	<b>Activity</b>
<b>Community Events:</b>	
Chinese Japanese Khmer Korean Spanish Tagalog Vietnamese	CBOs did outreach and distributed materials at 46 local community events serving 20,543 customers.
<b>Media:</b>	
<u>Television</u>	No television interviews were conducted in 2013.
<u>Radio</u> Chinese Spanish Vietnamese	Heavenly Rainbow AM1430 (No. Reached: 10,000) Gold Coast Broadcasting KUNX (No. Reached: 40,000) Bolsa Radio (No. Reached: 100,000)
<u>Print</u> Chinese (No. Reached: 150,000) Vietnamese (No. Reached: 65,000) Spanish (No. Reached: 50,000) English (No. Reached: 25,000) Tagalog (No. Reached: 95,000) Korean (No. Reached: 64,000) Japanese (No. Reached: 40,000)	Our Town (El Sereno) La Prensa Song Moi Vietnamese Weekly Magazine Vietnamerican The Record Asian Journal Rumores Miniondas The Korea Times The Korea Daily Lighthouse Magazine Palacio of Long Beach Tribune USA Chinese Christian Herald Crusades Nikansan
<b>Consumer Education: By Topic</b>	
Arabic Armenian Cantonese English Farsi Indonesian Japanese Khmer	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 one-to-one education with 3,684 customers.

Korean Spanish Tagalog Vietnamese Dari Mandarin Russian	
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SCE conducted marketing to increase awareness and enrollment of the CARE/FERA programs as described below:

**Marketing**

- 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 online Welcome Kit at SCE.com/welcome, more than 480,000 customers learned about bill paying options, which included CARE/FERA program details and enrollment in financial assistance through Energy Assistance Fund (EAF) if necessary.
- 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 bills.
- 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. In June and July, more than 70,000 identified customers participating in the Medical Baseline program received a packet of information including an introduction letter and 8-page Energy Guide. This Guide, which also targeted seniors, included useful conservation tips and relevant solutions to help manage their electricity and lower their energy bills, including enrolling in CARE or FERA, and participating in the ESA Program.
- As part of the CARE/FERA annual solicitation process in June 2013, SCE included CARE/FERA enrollment

applications in the bills of nearly 3 million customers receiving a paper bill (not receiving bills online). Because of this effort, nearly 397 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 / Home Energy Advisor energy usage report includes information about the CARE and FERA programs.
- SCE engaged water utilities with overlapping shared service territory to facilitate D.11-05-020, which directs class A and B water utilities and energy utilities to exchange information relating to customers that are currently on their respective low income rate discount programs. The purpose of this effort is to increase participation rates for water low-income assistance programs. Through this expanded data-sharing, two households were enrolled in the FERA program.
- SCE continued its 'self-service' efforts to encourage enrollment through its website ([www.sce.com](http://www.sce.com)), where more than 2,100 households enrolled in FERA, and nearly 20,000 households enrolled via SCE's automated phone system.
- SCE's Home Energy Efficiency Survey Recommendations report included information on CARE and FERA programs.
- In Q4, SCE embarked on an ethnic digital and print media ad campaign to reach the African-American, Asian (Chinese, Korean, Vietnamese, and Filipino) and Native American communities. Print media included Black Voice News, Inland Valley News, Long Beach Times, Sing Tao, Korea Times, Viet Bao and Asian Journal.
- SCE began social media for Income Qualified Programs in Q2 by leveraging Twitter and Facebook to increase awareness and participation in CARE/FERA and ESA. In total, there were more than:
  - 332,000 Facebook and Twitter Impressions
  - 241,000 total Facebook impressions
    - 11 Posts; 356 "Likes"; 214 "Shares"; 23 "Comments"
  - 91,000 Twitter feeds

- 26 Tweets; 39 “Re-tweets”; 16 “Favorites”

### **Earned Media (PR and Outreach)**

#### **African-American**

17 earned media placements within the African-American community resulted in a total of 891,250 impressions, which includes print and online readers, as well as radio listeners. Two press releases were distributed, titled “Energy Savings Programs Continue to Help SCE Customers Save Money” and “Southern California Edison Partners with Customers to Conserve Energy.”

#### **Print**

Information about SCE’s money saving programs such as CARE and FERA were published in a number of publications resulting in 9 print media placements such as: Tri-County Sentry, San Bernardino American News (3 placements), Inland Valley News, Long Beach Times (2 placements), West Side Story Newspaper, and Inglewood Today.

#### **Online**

Online sites such as Blackvoicenews.com, Longbeachtimes.org, lawattstimes.com and sbamerican.com conveyed information on SCE’s money-saving programs such as CARE and FERA, which resulted in six media placements.

#### **Broadcast**

The San Bernardino-based radio station KCAA AM 1050 discussed the CARE and FERA programs on-air, including the benefits they provide for participants.

A brief summary of total audience reach is as follows:

Total Print Impressions	586,250
Total Broadcast/Online	137,500
<b>Total Audience Reach</b>	<b>723,750</b>

#### **Asian**

In 2013, 50 earned media placements covering the CARE/FERA programs within the Asian Community totaled 10,916,234 impressions.

A total of one press release “Energy Saving Programs Continue to Help SCE Customers Save Money” and one advertorial garnered great coverage during the months of May, June, November and December of 2013. The



stories were distributed in Cambodian, Chinese, Farsi, Filipino, Indian, Japanese, Korean, Pakistani, Thai and Vietnamese.

#### Print

Information about SCE's CARE/FERA programs were conveyed in different Asian market publications including, but not limited to, International Daily News, Korea Herald, Korea Daily, Korea Sunday News, Korea Times, Viet Bao Daily, Siam Media, World Journal, Asian Weekly, Sereechai, Weekend Balita, Angkor Borei News, China Press, Daily Sports Seoul, and India Post:

- Total Earned Placements: 17
- Total Impressions: 3,290,000

#### Online/Social Media

Print publications and TV outlets also posted stories online, with a total of 19 placements, including, but not limited to, CTI TV, ZW-TV, Korean Daily, Viet Bao Daily News, Asian Journal, Siam Media, World Journal, Chinese Daily, and Rafu Shimpo:

- Total Earned Placements: 19
- Total Impressions: 5,370,371

#### Television

ZW-TV, CTI-TV TVK24 News, interviewed spokesperson on CARE/FERA programs.

- Total Earned Placements: 6
- Total Viewership: 2,250,000

A brief summary of total audience reach is as follows:

Total Print Impressions	3,290,000
Total Online	5,370,371
Total Broadcast	2,250,000
Total Social Media	5,863
<b>Total Audience Reach</b>	<b>10,916,234</b>

#### Hispanic

In 2013, 20 earned media placements covering CARE/FERA programs within the Hispanic community totaled 2,356,255 earned media impressions.

#### Print

Information about SCE's CARE/FERA programs were conveyed in several different publications including: El Clasificado; La Prensa Hispana LA; and El Panamericano.

**SCE's FERA Report**  
**January 1, 2013– December 31, 2013**

- Total Earned Placements: 3
- Total Circulation: 460,000
- Total Impressions: 1,610,000

**Television**

9 interviews were conducted within segments featured in Los Angeles and Palms Springs stations' morning and evening newscast. Stations included: KMEX-TV Univisión 34; KVER-TV Univisión Palms Springs; KWHY-TV Mundo Fox 22; KUNA-TV Telemundo Palms Springs and KVEA-TV Telemundo 52 "Buenos Días Los Angeles":

- Total Earned Hits: 9
- Total Viewership: 343,155

**Online**

Publications that posted information about CARE/FERA on their websites include: KVER-TV (Online); Latino California; Long Beach Al Día; El Clasificado; Nuestros Valles and El Panamericano.

- Total Earned Online Hits: 6
- Total Online Visitors: 287,500

**Radio**

During a radio interview with KUNA-FM La Poderosa 96.7 FM and W Radio 690 AM

- Total Earned Hits: 2
- Total Listenership: 115,600

A brief summary of total audience reach is as follows:

Total Print Impressions	1,610,000
Total Online	287,500
Total Broadcast	343,155
Total Radio	115,600
<b>Total Audience Reach</b>	<b>2,356,255</b>

**Paid Media**

**African-American**

Print Advertorials – A total of six advertorials were purchased with African American media outlets that highlighted that SCE's Energy Savings Program can help consumers save during the holiday season. Publications included: Inland Valley News, L.A. Focus, Pasadena Journal,

San Bernardino American, Morningside Park Chronicle, Tri-County Sentry.

### **Asian**

Print Advertorials – 17 advertorials were purchased with Asian American media outlets and received added-value opportunities that highlighted that SCE's Energy Savings Program can help consumers save during the holiday season. Publications included, but were not limited to, Asian Journal, Pakistan Link, Philippines News, Taiwan Daily News, India West and India Journal.

#### **A brief summary of Asian Sponsorship and added-value as follows:**

Total CARE/FERA Sponsorship Print Placements = 17

Total Circulation = 606,000

Total Impressions = 2,121,000

Total Added Value- CARE/FERA Social Media Placements = 10

Total Online Impressions = 695,290

### **Hispanic**

Print Advertorials – Seven advertorials were purchased with Hispanic media outlets that highlighted that SCE's Energy Savings Program can help consumers save during the holiday season. Publications included: Hoy, La Nueva Voz, La Prensa del Valle de Coachella, Miniondas, El Panamericano, Azteca News. Also, Miniondas and La Nueva Voz outlets posted stories online.

#### **A brief summary of Hispanic Sponsorship and added-value as follows:**

Total CARE/FERA Sponsorship Print Placements = 7

Total Circulation = 398,500

Total Impressions = 1,394,750

Total Added Value- CARE/FERA Social Media Placements = 4

Twitter Followers= 107

Total Likes= 479

Total Impressions = 586

**B. Discuss each of the following:**

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

The CARE/FERA programs continuously integrate efforts and messaging with the ESA Program at all outreach events, communications, and marketing campaigns.

- 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. 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.

<b>TABLE 5</b>						
<b>FERA Self-Certification and Self-Recertification Applications<sup>5</sup></b>						
	<b>Provided<sup>6</sup></b>	<b>Received</b>	<b>Approved</b>	<b>Denied<sup>7</sup></b>	<b>Pending/Never Completed<sup>8</sup></b>	<b>Duplicates</b>
<b>Utility</b>		14,577	7,576	2,955	3,945	101
<b>Capitation</b>		138	137	-	-	1
<b>Other Third-Party</b>		16	16	-	-	-
<b>Total</b>		<b>14,661</b>	<b>7,715</b>	<b>6,844</b>	<b>-</b>	<b>102</b>

**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.

<b>TABLE 6<sup>9</sup></b>						
<b>FERA Random Post-Enrollment Verification Requests<sup>10</sup></b>						
	<b>Requested</b>	<b>Received</b>	<b>Approved</b>	<b>Denied</b>	<b>Pending/Never Completed<sup>11</sup></b>	<b>Duplicates</b>
<b>Total</b>	1,083	1,029	69	162	798	0

**V. Program Management**

<sup>5</sup> Includes sub-metered tenants.

<sup>6</sup> 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.

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

<sup>8</sup> Includes cancelled recertification requests and closed accounts.

<sup>9</sup> 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.

<sup>10</sup> Verification process for FERA is the same as CARE.

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

**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 PY2013.