BEFORE THE PUBLIC UTILITIES COMMISSION OF THE

STATE OF CALIFORNIA

Application of Southern California Edison Company (U 338-E) for Approval of its Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets for Program Years 2015-2017.	Application 14-11-007
And Related Matter	A.14-11-009 A.14-11-010 A.14-11-011

SOUTHERN CALIFORNIA EDISON COMPANY'S (U338-E) SECOND AMENDED 2019 ANNUAL REPORT FOR 2018 LOW INCOME PROGRAMS

ANNA VALDBERG
R. OLIVIA SAMAD

Attorney for
SOUTHERN CALIFORNIA EDISON COMPANY

2244 Walnut Grove Avenue
Post Office Box 800
Rosemead, California 91770
Telephone: (626) 302-3477
Facsimile: (626) 302-6693
E-mail: Olivia.Samad@sce.com

Dated: **August 16, 2019**

BEFORE THE PUBLIC UTILITIES COMMISSION OF THE

STATE OF CALIFORNIA

Application of Southern California Edison Company (U 338-E) for Approval of its Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets for Program Years 2015-2017.	Application 14-11-007
And Related Matters	A.14-11-009 A.14-11-010 A.14-11-011

SOUTHERN CALIFORNIA EDISON COMPANY'S (U338-E) SECOND AMENDED 2019 ANNUAL REPORT FOR 2018 LOW INCOME PROGRAMS

Southern California Edison Company (SCE) hereby submits its Second Amended Annual Progress Report (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 2018. SCE amends the below sections and ESA Tables to update total household treated results and final disability percentages. In addition, CARE Table 13 is updated to correct annual number provided for customers removed for exceeding 600% of baseline in any monthly billing cycle. The amended information is the only updates to the report and supersedes the information submitted on July 3, 2019.

Page	Section/Table	Updated
ii	ESA Summary Table	Homes treated number and %
1	Section I Executive Summary	Homes treated number and %
1	Section I Executive Summary	Number of customers deemed first touch
7	Table 1.2.1 Program Summary	Homes treated and %
10	Table 1.4.1 No. of Service Accounts	No. of homes treated 2018 and 2002-2017
11	Section 1.4.3	Homes treated and %
12	2018 Disability Table	Updated Totals for SCE Referrals, Joint Utility and Outreach Enrollments

Table Updates:

- ESA Program Table 2 – Expenses & Energy Savings by Measures Installed
- ESA Program Table 3 – Cost Effectiveness
- ESA Program Table 4 – Detail by Housing Type and Source
- ESA Program Table 6 – Installation Cost of Program Installation Contractors
- ESA Program Table 9 – Life Cycle Bill Savings by Measure
- ESA Program Table 11 – Bill Savings Calculations by Program Year
- ESA Program Table 13 – Categorical Enrollment
- ESA Program Table 15 – Lighting
- CARE Program Table 13 – High Usage Verification Results Update

Respectfully submitted,

ANNA VALDBERG
R. OLIVIA SAMAD

/s/ R. Olivia Samad
By: R. Olivia Samad

Attorney for
SOUTHERN CALIFORNIA EDISON COMPANY

2244 Walnut Grove Avenue
Post Office Box 800
Rosemead, California 91770
Telephone: (626) 302-3477
Facsimile: (626) 302-6693
E-mail: Olivia.Samad@sce.com

Dated: August 16, 2019

Attachment 1

SCE's Second Amended ESA and CARE Programs Annual Report for Program Year 2018

SECOND AMENDED ANNUAL REPORT ACTIVITY ON LOW INCOME ASSISTANCE PROGRAMS

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

and

California Alternate Rates for Energy (CARE) Programs Annual Report

2018 RESULTS

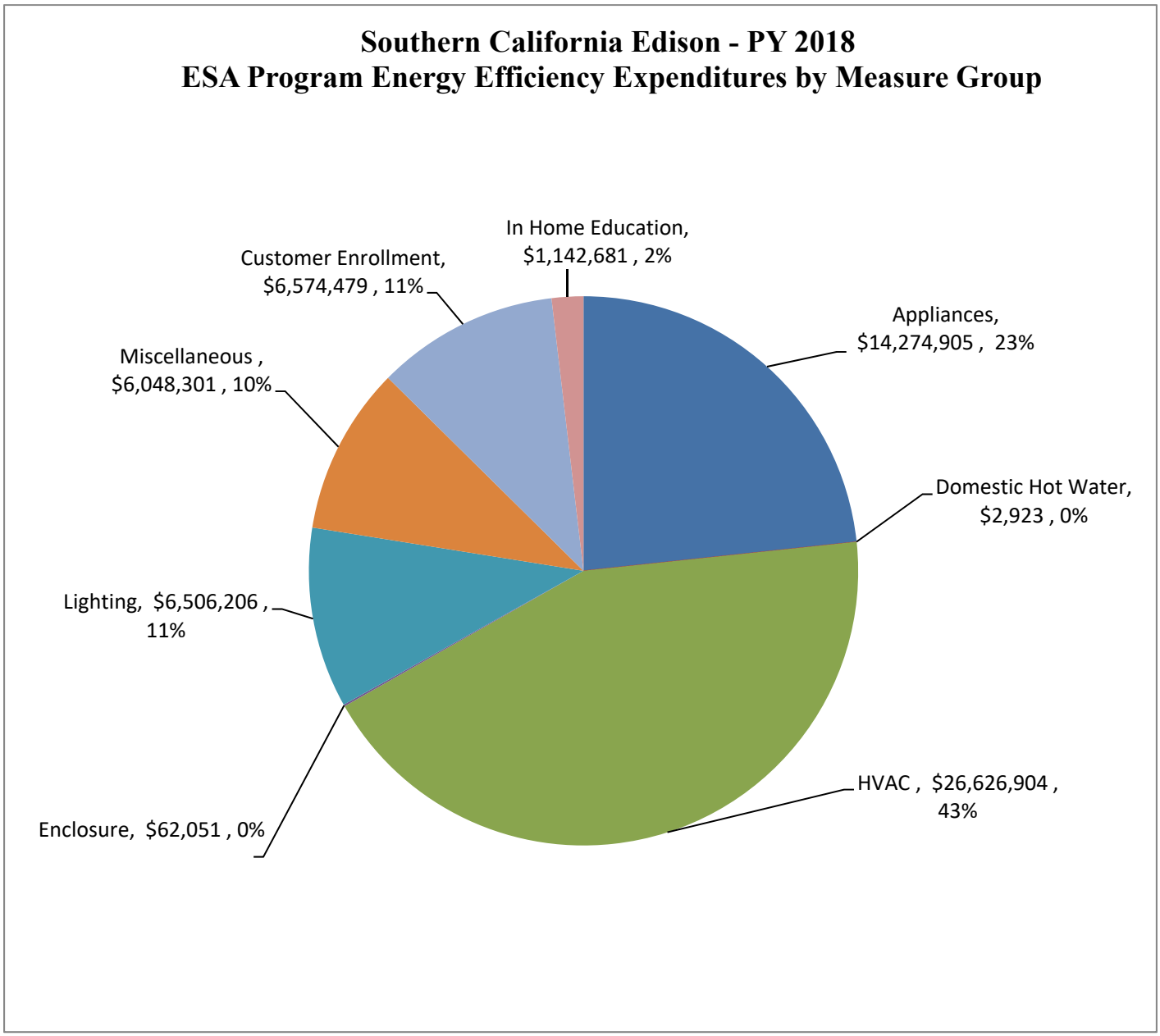
August 16, 2019

The tables below provide a summary of the expenditures and activities during Program Year (PY) 2018 for the Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE) Programs.

2018 Energy Savings Assistance (ESA) Program Summary

2018	Authorized / Planning Assumptions	Actual	%
Budget	**$61,919,683**	**$64,849,390**	**105%**
Funded from 2009-2016 Unspent Funds	**$17,186,772**	**$2,968,328**	**17%**
Homes Treated	**93,597**	**86,307**	**92%**
kWh Saved	**30,800,000**	**47,222,851**	**153%**
kW Demand Reduced		**6,367**	
Therms Saved		**N/A**	

2018 ESA Program Expenditures by Measure Group



2018 CARE Program Summary

2018	Authorized Budget	Actual	%
Administrative Expenses	$7,397,516 [1]	$7,435,063	101%
Subsidies	$482,397,449	$376,226,811	78%
Total Program Costs and Discounts	$489,794,965	$383,661,874	78%
CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc.	Self-Certified as Categorically Eligible	Self-Certified as Income Eligible
Method	61,926	156,667	92,012
CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
Total Enrolled	1,422,225	1,205,539	85%

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

Table of Contents

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

1.1 Alignment of ESA Program with Strategic Plan Goals and Strategy 1
1.2 Energy Assistance Savings Program Overview 6
1.3 Marketing, Education, and Outreach 7
1.4 Energy Savings Assistance Program Customer Enrollment 10
1.5 Disability Enrollment Efforts 11
1.6 Leveraging Success, Including LIHEAP 13
1.7 Integration Success 15
1.8 Workforce Education & Training 18
1.9 Legislative Lighting Requirements Status 20
1.10 Studies 21
1.11 Pilots 24
1.12 "Add Back" Measures 25
1.13 Low-Income Working Groups 26
1.14 Annual Public ESA Program and CARE Meeting 30
1.15 Multifamily Properties 30

2. California Alternate Rates for Energy (CARE) Annual Report 33

2.1 CARE Executive Summary 33
2.2 Participant Information 33
2.3 CARE Program Summary 37
2.4 CARE Program Costs 39
2.5 Outreach 42
2.6 Processing CARE Applications 59
2.7 Program Management 61

3. CARE Expansion Program 62

3.1 Participant Information 62
3.2 Usage Information 63
3.3 Program Cost 63
3.4 Outreach 64
3.5 Program Management 65

4. Fund Shifting 66

4.1 Report ESA Program Fund Shifting Activity 66

5. Commonly Used Acronyms 67

6. Appendix: ESA and CARE Program Tables 69

6.1 ESA Program Tables 69
6.2 CARE Program Tables 69

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

The objective of SCE's Energy Savings Assistance (ESA) Program is to help income-qualified customers reduce their energy consumption and costs while increasing their health, comfort, and safety at no cost to them. Through the ESA Program, SCE offers a number of energy-efficient appliances to income-qualified customers, including energy-efficient refrigerators and air conditioners, and home efficiency solutions like weatherization that can help customers save energy and money. The ESA Program is available to income-qualified customers living in single-family, multifamily, and mobile homes, including homeowners and renters. To be eligible for the program, customers must meet the program's income guidelines, which are established by the California Public Utilities Commission (CPUC) and updated annually. Specific measures are authorized according to criteria observed in each home for existing appliances and feasibility of installation.

This report provides information on SCE's ESA Program accomplishments and expenditures for Program Year 2018, during which the ESA Program treated 86,307 income-qualified customers, of which 67,249 were deemed "first touch home treated"[1] expending 105% of its authorized budget. In addition, the ESA Program saved 47.2 GWh. These savings were achieved by providing a mix of measures and services, including energy education, energy-efficient appliances, and home weatherization.

SCE's 2018 ESA Program operated in accordance with direction provided by CPUC Decisions (D.)16-11-022 and D.17-12-009, which adopted budgets and program directives for the Investor-Owned Utilities (IOUs)[2] for their administration of and participation in the California Alternate Rates for Energy (CARE) Program and ESA Program from 2017 through December 31, 2020.

1.1 Alignment of ESA Program with Strategic Plan Goals and Strategy

The long-term California Strategic Plan vision for the ESA Program is to have 100% of all eligible and willing low-income customers receive all cost-effective measures by 2020. The Plan lays out two goals in achieving the ESA Program vision:

1. By 2020, all eligible customers will be given the opportunity to participate in the ESA Program; and
2. The ESA Program will be an energy resource by delivering increasingly cost-effective and longer-term savings.

[1] Per D.16-11-022/D.17-12-009 first touches are households that have not received ESA treatment (versus *go backs*, customers previously treated).

[2] SCE, Pacific Gas and Electric Company (PG&E), San Diego Gas and Electric Company (SDG&E), and Southern California Gas Company (SoCalGas)

1.1.1 Meeting Goal 1: Improve Customer Outreach

The following table identifies the IOU strategies employed in meeting Goal 1, Improve Customer Outreach.

Implementation Plan and Timeline		
Strategies	**Term 2017-2020**	**IOU strategy employed this program year**
1: Strengthen program outreach using segmentation analysis and social marketing tools	• Continue to assess and evaluate customer behavior and energy savings; improve upon outreach to eligible communities.	In PY 2018, SCE continued to: • Identify neighborhoods with a dense low-income population and low ESA Program penetration and conduct marketing and outreach tactics in those neighborhoods, while partnering and integrating with other Income Qualified Programs (IQP) and carrying out joint enrollments with IOU counterparts. • Work with a network of contractors (Community Based Organizations (CBOs), Faith Based Organizations (FBOs), and private organizations) within the low-income communities in SCE's service territory. • Reach out to potential ESA participants and facilitate their participation in ESA through a targeted mailer to current CARE customers who have self-certified their income eligibility.
1.2: Develop a recognizable and trustworthy Brand and Tagline for the program	• Evaluate progress and refine strategy.	• All ESA Program marketing and advertising campaigns include the ESA Program brand. This ESA brand is included on, but not limited to, all printed materials such as collateral and flyers, targeted mailers, email, social media (Twitter and Instagram) and energy education materials. • SCE leveraged a site established by Southern California Gas Company (SoCalGas) that allows a network of contractors to procure clothing and other materials (e.g., clipboards) with the ESA Program brand.

Implementation Plan and Timeline		
Strategies	**Term 2017-2020**	**IOU strategy employed this program year**
1.3: Improve program delivery	• Use information from segmentation analysis to achieve efficiencies in program delivery. • Leverage with Local, State, and Federal agencies as well as other organizations to increase seamless coordination, efficiency, and enrollment.	• In 2018, the ESA program launched the "Master Agreement" Module in Energy Management Assistance Partnership System (EMAPS) which provides ESA contractors the ability to effectively serve multifamily buildings through a "top-down" approach. This approach is designed to implement a multi-unit agreement which allows a property owner to work with a single service provider, reducing the challenges and difficulties of working with multiple providers.

1.4: Promote the growth of a trained ESA workforce	• Implement ESA Program workforce education and training.
	• Coordinate ESA Program workforce and service providers with the broader market.
		• Seven types of training were offered in 2018:
		  • Service provider led Enrollment and Assessment (E&A)
		  • Back Office training with webinars
		  • SCE instructor led E&A Train- the-Trainer
		  • Smart Power Strip Tier 2 for Installation and Configuration procedures
		  • ESA Mobile for Inspections
		  • ESA Mobile for Installations, and
		  • CBT software training, which was offered to existing service providers to improve workforce skills and increase program efficiency.
		• SCE continued its process of engaging directly with ESA service providers to foster town hall discussions about their current and future training needs.
		• SCE enhanced the existing workforce training content for the E&A training course.
		• SCE turned over light-emitting diode (LED) training to service providers, allowing greater flexibility in

Implementation Plan and Timeline		
Strategies	**Term 2017-2020**	**IOU strategy employed this program year**
		addressing their individual training needs based on their staffing requirements.

1.1.2 Meeting Goal 2: ESA as an Energy Resource

The following table identifies the IOU strategies employed in meeting Goal 2: ESA as an Energy Resource.

Implementation Plan and Timeline		
Strategies	**Term 2017–2020**	**IOU strategy employed this program year**
2.1: Increase collaboration and leveraging of other low-income programs and services	• Continue to expand partnerships with stakeholders and seek new opportunities for data sharing.	• SCE continued to collaborate with Southwest Gas and share information on homes treated by ESA. • SCE met with the CPUC LifeLine Administrator to implement a bi-annual data sharing process whereby CARE Program participants' customer-specific data is provided to the LifeLine Administrator for ESA lead generation. • In Q4 2017 SCE entered into a Non-Disclosure Agreement (NDA) with Community Services Division (CSD) for customer-specific energy usage data and CSD-treated households to coordinate low-income program activities and objectives. In 2018 SCE provided customer data to CSD per the NDA agreement.

Implementation Plan and Timeline		
Strategies	**Term 2017–2020**	**IOU strategy employed this program year**
2.2: Coordinate and communicate between ESA, energy efficiency (EE), and Demand-Side Management (DSM) programs to achieve service offerings that are seamless for the customer	• Continually reevaluate and update programs to take advantage of new technologies.	• During delivery of ESA, where appropriate, provided customers information on SCE's DSM and EE programs, including the Summer Discount Plan (SDP). Additionally, ESA shares HVAC installation data with (SDP monthly to ensure existing SDP customers who may have been disconnected due to the installation of new equipment are reconnected as well as to identify potentially new customers to target; all HVAC installation customers are provided with an SDP information at the time of installation to encourage the customer to take advantage of the Summer Discount Program. • Increased integration efforts between the ESA and Multifamily EE Rebate (MFEER) programs and designated a Single Point of Contact (SPOC) to streamline the customer enrollment process. • Coordinated with the Single Family Affordable Homes (SASH) Program contractor to provide leads for low-income households and to ensure that all homes that sign up for SASH were either previously treated or were scheduled to be treated by ESA.

Implementation Plan and Timeline		
Strategies	**Term 2017–2020**	**IOU strategy employed this program year**
2.3: Provide low-income customers with measures that result in the most savings in the ESA program	• Continue to evaluate. Assess opportunities to incorporate new EE measures into the ESA program, such as plug-load reduction and new HVAC technologies.	• Effective January 1, 2018, SCE completely phased out compact fluorescent lights (CFLs) in the ESA Program and only offered LED bulbs • SCE's program design includes measures that increase the cost-effectiveness of the program (LEDs, torchieres, pool pumps, and refrigerators), reduce energy bills, improve the quality of life of customers (cooling measures), and provide long term energy savings (refrigerators and cooling measures). • SCE filed a mid-cycle Advice Letter (AL) proposing to expand the program offering by adding smart thermostats and freezers to its measure list.
2.4: Identifying segmented concentrations of customers to improve delivery	• Continue to evaluate approach and determine whether additional segments are needed.	• In 2018 SCE filed AL 3754-E[3] to provide common area measures to multifamily deed-restricted properties.

1.2 Energy Assistance Savings Program Overview

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

[3] Filed March 1, 2018, SCE Advice 3754-E Energy Savings Assistance Multifamily Common Area Measures Initiative Plan in Compliance with Decision 17-12-009.

Table 1.2.1. Program Summary[4]

2018	Authorized / Planning Assumptions	Actual	%
Budget	$61,919,683.00	$64,849,390	105%
Funded from 2009-2016 Unspent Funds	$17,186,772	$2,968,328	17%
Homes Treated	93,597	86,307	92%
kWh Saved	30,800,000	47,222,851	153%
kW Demand Reduced		6,367	

1.3 Marketing, Education, and Outreach

1.3.1 Summary of geographic segmentation strategy employed, (i.e. tools and analysis used to segment "neighborhoods," how neighborhoods are segmented and how this information is communicated to the contractor/CBO).

In 2018, SCE continued to utilize the EMAPS database to track program participation and to identify neighborhoods with a dense low-income population and low ESA Program penetration. EMAPS tracks the marketing and outreach tactics used in various neighborhoods to evaluate effectiveness and provide guidance to our contractors and CBOs and FBOs. Marketing efforts are staggered throughout the year to address specific neighborhoods (small geographic areas or "ZIP-9s") within SCE's service territory.

The ESA Program continued to focus the majority of its marketing and outreach (M&O) 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.

SCE continues to partner with CBOs, FBOs, and private-sector service providers to assess homes and deliver ESA Program services in local communities. The ESA Program aggregates leads in targeted geographic areas and then allocates the leads among service providers so it engages the service provider in a full day's worth of work within a specific neighborhood. This method distributes ESA work throughout the year for each ESA service provider.

In 2018, as ordered in D.16-11-022 and D.17-12-009, SCE continued to reach out via targeted marketing to CARE customers at or above the 90th percentile of

[4] This is the same ESA Program Summary table shown on Page ii, above.

usage who had not yet participated in the ESA program. SCE continues to track the ESA participation of these customers.

ESA Table 5, below, provides a lists of contractors, activities, and actual expenses for SCE's ESA service providers, as well as Women, Minority, Disabled Veteran Business Enterprise (WMDVBE) status. Workload management is particularly important when considering that a majority of CBOs and FBOs delivering ESA Program services are small and independently-owned.

SCE continues to gain knowledge, historic engagement and understand the needs of the tribal communities. In 2018, SCE continued working with SCE's Local Public Affairs liaison to promote the ESA and CARE Programs to Native American tribes. SCE began discussions with the Timbisha Shoshone tribe and other tribes within the Inyo-Mono service territory to address specific needs that the Programs could meet:

- ESA implementation at the Timbisha reservation began in November 2018, and
- Initial contact has been made with the Bridgeport Indian Colony, Benton Paiute, and Bishop Paiute.

Through this coordinated tribal engagement, SCE is on track to meet the intent of the D.17-12-009 in conferring about the ESA Program with federally recognized tribes in SCE's territory.

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

In 2018, SCE continued to leverage CARE's High Usage customers whose usage has been identified as 400% to 600% (or more) above the baseline CARE rate. The ESA Program refers these customers to SCE's contractors as Leads with the intent of enrolling these households into the ESA Program and providing energy-saving services.

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

In general, the components of the ESA Program — enrollment, assessment, energy audit, measure installations, and inspections — have not changed. SCE's priority continues to focus on outreach and program delivery to households not yet treated. However, from lessons learned from ESA implementation in the Aliso Canyon-affected area, SCE was able to identify customers previously treated who might be eligible for new measures and/or for measures based on changes to the ESA Program. For example, income-qualified customers who had

a refrigerator manufactured in 1999 and 2000 were targeted and offered the opportunity to replace the refrigerator, and households with at least six people or more could qualify to receive a second refrigerator replacement. Customers could also receive new measures, such as LEDs and advanced power strips.

Use of Athens Research[5] helped improve identification of under-penetrated areas within SCE's service territory and served as the foundation of planned marketing and outreach efforts. Using the ESA Program database the program team:

- Strategically grouped customers based on specific criteria (Climate Zone, County, City, ZIP Code, etc.)
- Collected customer data in each targeted area through outreach efforts, and
- Ultimately, tracked the results of each outreach effort.

The ESA Program continued its aggressive integration and partnering efforts with local governments and with organizations that serve the disabled community to increase program penetration and bring benefits to a wider range of customers.

Through paperless enrollment, ESA Program representatives were able to determine each customer's previous participation and eligibility while in the customer's home, thus eliminating return visits. In 2018, 261 ESA Program representatives from 24 different service providers used the paperless enrollment process to enroll nearly 97,000 qualified customer households.

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

In June 2018, SCE mobile optimized the Usage Presentation page for My Account users in SCE.com. This technological update will allow customers to view their end-use and electric usage profiles. The authorized and associated cost was $546,203.75. Below are some additional initiatives conducted in 2018:

- SCE continued to collaborate with the other IOUs in revising the statewide Energy Education Resource Guide for educating eligible customers in the field. The revised Energy Education Resource Guide was completed in July, and in September SCE was the first IOU to begin using the new materials.
- As directed in D.16-11-022, SCE worked with the other IOUs to submit an Advice Filing in March proposing implementation of a TOU Programmable Communicating Thermostat Pilot (PCT) Pilot. The

[5] Athens Research, March 18, 2018, Joint Utilities Low Income Working Group: Documentation for 2017-2018 Estimates of CARE/FERA/ESA Eligibility and Other House Size-By-Income Related Parameters

results of the pilot will be provided in 2019.

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

- A statewide Request for Proposal (RFP) was issued on March 30, 2018. In June, SCE, in collaboration with the other IOUs, selected a load disaggregation vendor who will develop customer end-use and electric usage profiles. The project scope is divided into two phases. Phase 1 will produce end-use load profiles and a segmentation report for a sample of CARE customers in the PG&E, SCE and SDG&E service areas. Phase 2 will expand the analysis to a wider group of customers and provide delivery of results to customers and ESA contractors. The statewide group meets biweekly. In 2018, three milestones were met: the contract was signed, the project plan for Phase 1 was finalized, and the customer segmentation design was completed. The results for Phase 1 are expected by mid-year 2019.

SCE will continue to develop implementation design and strategy in 2019 and to explore how this usage data can be leveraged in both Demand Response (DR) and Energy Efficiency (EE) programs.

1.4 Energy Savings Assistance Program Customer Enrollment

1.4.1 ESA Customer Enrollment: Distinguish between customers treated as "Retreated or Go Backs" and "First Touch" Customers so that the Commission has a clear idea of how many new customers the IOUs are adding to the Energy Savings Assistance Program.

Approximately 22.07% percent of the homes treated in 2018 are classified as "go backs" and/or "retreated." These customers were identified as having previously received services between 2002 and 2017.

Table 1.4.1

No. of Homes Treated in 2018	No. of Service Accounts Treated in 2018 Previously Treated in 2002-2017	Percentage of Go Back Homes
86,307	19,058	22.07%

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 in 2018 included, but were not limited to:

- The ESA program launched a Master Agreement Module in EMAPS

which provides ESA service providers the ability to effectively serve multifamily buildings through a top-down approach. This approach is designed to implement a multi-unit agreement which allows a property owner to work with a single contractor to:

- Install and/or replace property-owned in-unit measures
- Serve the whole building using the 80/20 Rule, and
- Streamline the enrollment and participation of tenants by eliminating the need to capture income verification documents already provided to the property owner.

Note: *The Master Agreement Module can also be used to service multifamily building common areas.*

- Customers who provided documentation demonstrating that one or more household members currently participate in approved state or federal assistance programs no longer needed to provide additional income documentation in order to qualify for the ESA Program.

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 2018 annual goal of homes treated.

SCE treated a total of 86,307 or 92%, of our 93,597 goal. SCE continues to experience difficulty in enrolling first touch customers in the program. While these customers are included in various targeted marketing campaigns, SCE continues to explore all opportunities to have these customers participate. For instance, in Q4 2018, SCE identified customers who have not previously enrolled and reside in high potential areas to be able to self-certify as eligible in the program. This is set to roll out in Q1 of 2019.

SCE will continue to re-evaluate its M&O approach to optimize results and make IT enhancements to provide SCE's contractors with the tools to effectively reach the 2020 strategic goal.

1.5 Disability Enrollment Efforts

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

SCE continued its efforts to identify and enroll low-income customers with disabilities and to take opportunities to work with disability-related CBOs. Our targeted customer outreach efforts encouraged households to reach out to ESA service providers and schedule an assessment of their homes to determine their eligibility for program measures. A customer may state (self-identify) that he or she, or someone in the household, is disabled; alternatively, during the in-home

assessment, the service provider representative may learn that someone living in the home is disabled.

The majority of ESA enrollments where at least one member of the household had a disability were achieved through an SCE Referral. This consisted of customers who voluntarily self-identified themselves and/or a household member as disabled, or who were enrolled from the Medical Baseline or CARE programs.

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

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

To assist visually impaired customers enrolled in ESA, during 2018 SCE developed a version of the statewide Energy Education guide in a large font format. Font sizes for headlines, sub-headlines, and text were increased to allow partially-sighted customers to read helpful EE tips provided. In 2018 SCE also planned for developing energy education information in Braille.

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

Table 1.5.3. Information on Enrollment of Customers with Disabilities

2018 Disability Enrollments			
Source	**Total Enrollments**	**Disability Enrollments**	**% of Disability Enrollment**
SCE Referral	23,933	3,842	16%
Joint Utility	44,152	4,960	11%
Outreach	18,222	1,658	9%
Total	**86,307**	**10,460**	**12%**
Target Enrollment Rate			**15%**

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

In 2018, SCE did not reach the overall target of 15% for the goal of enrolling members of the disabled community. Of the three sources, SCE Referrals exceeded the 15% target, whereas Joint Utility and Outreach efforts fell short. SCE believes some treated homes may have included members with disabilities that were not classified as such because of the barriers posed by D.08-11-031, Ordering Paragraph 3, which excludes IOUs from asking customers if they are disabled, but instead allows customers with disabilities to voluntarily self-identify.

SCE will continue to make every effort to reach the disabled community and to achieve the 15% target by:

- Seeking new marketing and outreach tactics that target customers with disabilities, and
- Establishing new alliances with organizations offering services to low-income clients with a disability.

1.6 Leveraging Success, Including LIHEAP

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

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

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

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

of Community Services and Development (CSD) Low Income Weatherization Program (LIWP) and/or the Low Income Home Energy Assistance Program (LIHEAP), which allow customers to realize the benefits of multiple low-income programs.

In addition, SCE's marketing and outreach efforts continued to include areas identified as Disadvantaged Communities (DAC). While SCE recognizes that every DAC is a low-income community, these disadvantaged communities are generally populated by low-income residents with environmental and pollution burdens. SCE will continue to work with other departments to integrate ESA communications with other program offerings within these communities.

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

SCE also continues to partner with the Single-Family Affordable Solar Homes (SASH) Program administered by GRID Alternatives. Specifically, GRID Alternatives provides SCE with a list of homes it has determined to be eligible for SASH treatment. SCE then ensures that the homes on the list are enrolled in the ESA Program and, if they have not been previously enrolled, that they receive all eligible and feasible measures. This ensures that the energy generated by the solar systems is not wasted by inefficient consumption.

*See **Section 1.7.7,** below, for the number of SCE referrals sent to Grid Alternatives in 2018.*

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

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

SCE employs several service providers that also have contracts with SoCalGas ESA program. This type of leveraging has multiple benefits, including reducing the number of contractor visits to a customer's home which helps prevent additional expenses.

For SCE's ESA Program dollar savings, energy savings and benefits, and

enrollment tracking and reporting associated with leveraging efforts, refer to ESA Program Table 14.

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

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

SCE and the other IOUs met with CSD staff regularly throughout 2018 to discuss leveraging with the CSD's Low Income Weatherization Program for Large Multifamily Properties (MF LIWP) as directed in D.16-11-022. SCE expects to implement leveraging with MF LIWP during the second quarter of 2019.

In Q4 2017, SCE and CSD entered into a NDA for customer-specific energy usage data and information for CSD-treated households, to coordinate low-income program activities and objectives. As a result, data sharing efforts with CSD were implemented in 2018, pursuant to the requirements.[6]

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

SCE had a series of meetings with Metropolitan Water District (MWD) in 2018 to discuss how to collaborate on programs and explore how to apply the new Water-Energy Nexus calculator to aid in identifying cold water measures with potentially significant energy savings.

Additionally, SCE worked with MWD to complete the development of a memorandum of understanding (MOU) which has been executed and will continue to explore opportunities of coordinating the installation of cold water measures such as the high efficiency clothes washer and may propose new measures in the upcoming ESA and CARE Post-2020 Application.

1.7 Integration Success

Per D.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."

[6] D.17-12-009 Ordering Paragraph (OP) 140.

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

In 2018, the CARE Program identified customer households with energy consumption in excess of 400% over their Tier 1 baseline allocation and coordinated with the ESA Program to expedite enrollment of these households into the ESA Program, per Public Utilities Code (PUC) §739.1. This code authorizes electrical corporations to require CARE Program participants with excessive energy usage (over 600% of baseline) to participate in the ESA Program. Section 739.1 also authorizes electrical corporations to require these households, as a condition of their continued participation in CARE, to enroll in the ESA Program and reduce their energy consumption below 600% or be subject to removal from the CARE Program. Households with energy consumption exceeding 400% of baseline were also selected to minimize their risk of removal from the CARE Program.

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

In 2018, as directed in D.16-11-022 and D.17-12-009, OP109,[7] SCE continued to target marketing on CARE customers at or above the 90th percentile of usage who had not yet participated in the ESA program. SCE continues to track ESA participation for these customers.

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

In 2018, SCE's ESA Program staff worked with SCE's Multifamily Energy Efficiency Rebate (MFEER) Program staff to develop an integrated strategy targeted to property managers and owners of multifamily buildings for the 2017-2020 program cycle. This strategy focused on common areas of multifamily buildings and included:

- Developing SPOCs for property managers and owners
- Implementing a layered program approach for property owners and/or managers through the SPOC to reduce confusion, and
- Educating property owners and/or managers and renters on how to get the most energy savings from the program investment.

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 Program and Local Government Partnerships (LGP) staff continued to work

[7] Ordering Paragraph (OP) 106 ordered in D.16-11-022 was superseded in D.17-12-009 as OP 109.

together to coordinate plans and schedules for outreach events. ESA staff regularly met with LGP staff to identify potential opportunities for integrating the programs, including:

- Partnering with the city of Buena Park for their first Senior Day event, attracting more than 500 citizens to learn about IQP.
- Joining the city of Norwalk at their second annual Community Connect event in December. At this event, SCE continued to partner with the city of Norwalk to plan and execute this event in conjunction with their Snow Days event, and brought representatives from various parts of the company. Representatives from IQP spoke directly with eligible customers to inform them about the low-income programs. Two ESA Program service providers, Maravilla Foundation and Synergy Companies, provided program information and obtained customers' information for future follow-up.
- In addition, ESA Program materials were provided to SCE's Local Public Affairs representatives to distribute and discuss during routine meetings with the public and government partnership officials.

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

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

1.7.5 Describe the new efforts in program year to integrate and coordinate the ESA program with the Demand Response Programs, including successes in Air Conditioning Cycling or other Demand Response Programs.

As part of its integration effort, the ESA Program provides information related to DR programs such as the Summer Discount Plan (SDP) during the installation of HVAC replacements. Specifically, customers who were deemed eligible for HVAC replacement were provided with an application brochure for participation in SDP by installation crew members who explained the benefits of the program to the customer.

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

The low-income portion of the California Solar Initiative is divided into the Single-Family Affordable Solar Housing (SASH) and Multifamily Affordable Solar Housing (MASH) programs:

- SASH is managed by a program manager outside of SCE, and therefore coordination with SASH falls under the "leveraging" umbrella described in ***Section 1.6.1,*** above.
- To the extent that MASH funds are available, SCE's MASH Program

staff meets with multifamily housing organizations, contractors, tenants, building owners, and government officials to explain opportunities that may be available for eligible low-income tenants through the ESA Program. These organizations partner with SCE in supporting both the MASH and ESA programs and assist in spreading the word about how communities and their low-income residents can enroll in and take advantage of SCE's Income Qualified Programs as a whole.

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

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

In 2018, SCE provided 210 such referrals to GRID Alternatives. This is an ongoing monthly activity.

1.8 Workforce Education & Training

1.8.1 Please summarize efforts to improve and expand ESA Program Workforce Education and Training. Describe steps taken to hire and train low income workers and how such efforts differ from prior program years.

During 2018, SCE continued its use of proven strategies to provide training on different aspects of the program to its Service Provider network, which included installation contractors, CBOs, FBOs, and vendors working in the Program. SCE also continued direct engagement with service providers to know of their individual training needs.

The training curriculum includes workshops that provide instruction on topics such as the policies and procedures for the various components of the program, back-office best practices, and computer skills training. The Enrollment and Assessment (E&A) training curriculum consists of a two-day service provider-led training workshop that gives trainees comprehensive instruction on policies and procedures for income documentation, customer eligibility, and measure eligibility. Additionally, Program representatives complete training on energy education-related topics. The curriculum is continually updated to include information on other programs and services that will educate and empower customers in ways to reduce energy usage and lower their bills.

During 2018, SCE continued its use of online seminars (webinars) as a low-cost alternative to face-to-face meetings. The use of webinars reduces the overhead, travel costs, and scheduling delays typically associated with face-to-face meetings, and was most effective when delivering training related to changes to existing policies and procedures, since it allowed all service providers to receive

the same information.

SCE continued its partnership with SoCalGas to offer free online software training to employees of ESA service providers through the Computer Based Training (CBT) Learning System. Courses included Microsoft Office and Windows Navigation, among others. An additional benefit of the CBT Learning System is that it is self-contained, meaning that users are not required to purchase any software to gain and refine skills for that course.

In March 2018, SCE hosted representatives of ESA service providers at an all-day Training Summit meeting to discuss their current and future training needs in a town hall setting. The Training Summit included a presentation by SCE on its training plans for the remainder of 2018 and facilitated discussions to share ideas for potential program improvements. SCE plans to continue this direct engagement with ESA service providers in future program years.

During 2018, SCE and SoCalGas continued the practice of reviewing existing ESA Program internal processes to identify areas where processes could be aligned, and efficiencies gained. The goals of the alignment effort are:

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

As described in ***Section 1.3.4,*** above, SCE collaborated in 2018 with the other IOUs to revise the Statewide Energy Education Resource Guide for educating eligible customers in the field. The revised Energy Education Resource Guide was completed in July, and in September SCE was the first IOU to use the new materials.

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

Many of the ESA Program service providers, especially CBOs, are situated in low-income and disadvantaged communities and provide jobs within these communities. As of December 31, 2018, these organizations provided approximately 759 jobs that supported the ESA Program. SCE's training includes:

Enrollment and Assessment (E&A) Training: Offered to new employees hired by the service providers and required before employees may conduct customer enrollment, income verification, and home assessment activities. Trainees also receive instruction on different approaches to the delivery of energy education. Service providers conduct their own

training with curriculum materials developed and provided electronically by SCE, although testing on the training is managed by SCE's ESA Program Training and Compliance advisor.

ESA Mobile Training: Used to instruct service providers on the proper use of the Mobile Tablet (Paperless) processing system. ESA Mobile is available in three specific usage types: Assessment, Installation, and Inspection. Service Providers receive training on the tool and in turn train their employees as needed.

CBT Learning System (Computer Skills Training): Offered to existing and new employees. This workshop includes, but is not limited to, basic computer skills and tools such as Microsoft Word, Excel, and PowerPoint.

Table 1.8.2. Employees Trained

Type of training or recruitment conducted	Employees trained
Enrollment and Assessment (E&A) Training	119
ESA Mobile Training (Paperless Processing)	106
Computer Skills Training	27

1.9 Legislative Lighting Requirements Status

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

Effective January 1, 2018, SCE completely phased out CFLs in the ESA Program and only offered LED bulbs. The LED bulbs comply with the California Energy Commission's LED lamp specification requirements. SCE's ESA Program did not experience any supply issues in 2018 because of commitments undertaken by the supplier selected through SCE's competitive bid process for LED lighting.

1.9.2 Provide a Summary explaining how IOU promotes the recycling collection rules for CFLs

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

- The energy savings benefits associated with replacing incandescent light bulbs with CFLs.
- The toxicity of mercury in CFLs, a substance that can be harmful if not appropriately handled, and
- Instructions on the proper procedures for collecting and disposing of burned-out and broken CFLs, such as placing them in a sealed plastic

bag and taking them to a local recycling center or contacting a local hazardous waste agency for local recycling options.

1.9.3 Complete Table 15 (in Appendix). In addition, please briefly Summarize the CFL Procurement Process for the IOU, including manufacturers, distributors, warehousing, and contractor delivery.

Table 15 is no longer applicable because it was specific for CFLs; however, the ESA Program's LED supplier was selected based on product availability, quality, pricing, experience, warranty, location, and warehousing. As part of the procurement process, SCE requires the supplier to maintain at least 30 days' worth of product for all service providers and to deliver product to the service providers' facilities within 14 days from the order date.

1.10 Studies

1.10.1 For each Study, provide 1) a summary describing the activities undertaken in the study since its inception; 2) the study Progress, Problems Encountered, ideas on Solutions; and 3) the Activities anticipated in the next quarter and the next year.

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

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

Activity for 2018 associated with these authorized studies is discussed below. Table 1.10.1, following, provides an overview of the Statewide ESA Studies.

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

Study	Lead Consultant	Contracting IOU	Project Initiation	Project Completion	Statewide Budget
2019 Statewide LINA	Research Into Action	SCE	2018	2019	$500,000
PY2015 Statewide ESA Impact Evaluation	DNV GL	SoCalGas	2017	2019	$550,000
Statewide NEBs Study	Skumatz	SDG&E	2018	2019	$150,000
ESA portion of the Statewide Energy Efficiency Potential Study	Navigant	N/A	TBD	TBD	$300,000
Rapid Feedback Research & Analysis [8]	TBD	N/A	TBD	TBD	N/A
Total					**$1,500,000**

1.10.1.1 Statewide Low Income Needs Assessment (LINA) Study

The LINA Study is mandated to be updated every three years per AB 327 and PUC Sec. 382(d). During 2018 the following activities have taken place:

- Research Into Action was selected to conduct the study in January 2018. SCE formalized the contract in January 2018, and a project initiation meeting was held in February 2018.
- A final research plan was developed during Q1 of 2018, and a public workshop on the draft research plan was held on May 3, 2018.
- Data collection plans and instruments were developed during Q2-Q4 2018.
- Research into Action began collecting data in December 2018.
- The primary activities of the initial quarters of 2019 are expected to include additional data collection and preliminary analyses. The draft report is expected to be completed in August 2019, followed by a public workshop to review the results with the public and solicit stakeholder input. The current Needs Assessment study is on track to be completed by December 2019.

1.10.1.2 Statewide ESA Energy Savings Impact Evaluation

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

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

RFP to conduct a time-sensitive statewide ESA impact evaluation in November 2015. The project was awarded to DNV-GL in February 2016, with the contract held by SoCalGas, and was officially authorized in January 2017 (per D.16-11-022). The study initiation meeting was held in February 2017. A public workshop on the research plan was held in September 2017. Initial Phase 1 results were provide in June 2018, subsequently used in the Mid-Cycle Update Advice Letter filing in July 2018. The Phase 2 draft report is due on March 29, 2019 and is used for SCE's Application filing. This study used billing analysis to assess ESA program impact for 2015 to 2017 program years. The results of this multi-year analysis is then disaggregated into individual measures or measure groups. The final report is expected to be completed in May 2019.

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

The scope of work for the ESA NEB Study was developed in consultation with the Cost Effectiveness Working Group in 2017 as directed in D.16-11-022. An RFP for the study was issued in March 2018 and Skumatz Economic Research Associates was chosen as the study contractor. A project initiation meeting was held on August 24, 2018 and a Draft Research Plan was presented during a public webinar on October 12, 2018. Results are expected in early 2019 and will be presented in a public webinar.

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

D.16-11-022 and D.17-12-009 assert the benefit of following the guidelines established in the mainstream EE proceeding. Studies are required to solicit public input on research and deliverables via workshops or webinars and the CPUC's energydataweb. Parties are encouraged to submit written comments on the work before and/or after the public meetings, to be posted on the public document website. Notice of the public meetings are sent to subscribers on the public document website and to the applicable service list.

Beyond the authorized studies, any additional studies or analyses commenced via the ESA Program Rapid Feedback and Analysis funding adhere to the project initiation and execution requirements outlined in Section 5 of *Energy Division & Program Administrator Energy Efficiency Evaluation, Measurement and Verification Plan, Version 5270*. During 2018 no rapid feedback studies or analyses were initiated by SCE.

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

No studies were completed in 2018. The proposed study budgets are included below in Table 1.10.2.

Table 1.10.2. 2015-2018 Authorized Studies & Expenditures

Proposed Study	Lead Consultant	Managing Utility	Authorized Budget[9]	SCE Budget	SCE 2018 Expenses
2019 Statewide LINA	Research Into Action	SCE	$500,000	$150,000	$58,875[10]
PY2015 Statewide ESA Impact Evaluation	DNV GL	SoCalGas	$550,000	$165,000	$87,408
Statewide NEBs Study	Skumatz	SDG&E	$150,000	$45,000	$27,062
ESA Portion of the Statewide Energy Efficiency Potential Study	Navigant	NA	$300,000	$150,000	-0-
Rapid Feedback Research & Analysis	TBD	N/A	N/A	$200,000	-0-

1.11 Pilots

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

D.16-11-022 directed SCE, PG&E and SDG&E to propose a Programmable Communicating Thermostat Pilot, aligned with the recommendations in Appendix A of D.16-11-022. SCE filed a Tier 2 Advice Letter (3753-E) on March 1, 2018, as directed by D.17-12-009, proposing an implementation plan and requesting supporting budget. The goal of the pilot is to explore and evaluate whether using a Programmable Communicating Thermostat (PCT or smart thermostat) paired with a mobile phone application will affect the behavior of low-income, high-energy-usage customers in hot climate zones while on a Time Of Use (TOU) rate. On March 27, 2018, ED suspended the Advice Letter for additional staff review. On April 14, 2018, at the direction of the ED, SCE filed a supplement to the Advice Letter to clarify SCE's proposed budget. The ED also directed the three electric IOUs to jointly hire one consultant to evaluate the pilot. These changes — the suspension of the Advice Letter, the addition of new contract requirements, and the direction to coordinate using a joint statewide contractor — prompted the IOUs to submit a request for a time extension, which was approved, changing a

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

[10] This reflects SCE's portion of the $196,250.50 spent during 2018.

June 2018 launch date to October 2018.

SCE continued implementing the plan in 2018, including:

- Selecting and contracting for a suitable PCT and back-end data support
- Identifying low -income customers most likely to meet the pilot's requirement of being high users due to HVAC usage in the hottest climate zones
- Contracting with a firm to perform outbound pilot recruitment calls
- Contracting with an experienced HVAC installer to schedule and perform PCT installations, and
- Designing printed customer materials, such as TOU rate welcome kits for the treatment (PCT installed) and control (financial incentives only) groups.

SCE coordinated with SDG&E in support of PG&E's successful efforts to select and contract with a single statewide evaluator for the pilot on behalf of all three IOUs. Once the evaluator was on board and able to consult on evaluation needs, it became apparent that another pilot launch extension would be required. The IOUs requested and were granted permission by ED to launch pilot in January 2019. By the end of 2018 SCE had completed all planned activities on time, including:

- Identifying 172 customers who agreed to participate in the pilot
- Jointly designing the first of three surveys with the IOUs and evaluation consultant
- Training the installation contractor on both the installation and programming of the PCTs and the specific requirements for the pilot
- Mailing pilot "welcome kits" to treatment group and control group participants
- Queuing all participants to switch to TOU on their next meter read date in January 2019, and
- Securely sharing the treatment list of customers with the installation contractor so it could begin scheduling visits.

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 ***Section 1.11.1,*** above.

1.12 "Add Back" Measures

For measures that fall below the cost-effectiveness threshold under D.08-11-031, we

require additional reporting to show the cost, energy savings impacts, and related metrics.

SCE has provided the required reporting on "Add Back" measures in ESA Table 16. These measures were "added back" by the Commission in Attachment I to the D.14-08-030 guidance document.[11]

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

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

1.13 Low-Income Working Groups

D.12-08-044 and D.16-11-022 authorized the ED to form Working Groups to yield a fair, informed, balanced, and productive review of issues that a particular working group must review. Following is a summary of authorized Low Income Working Groups describing their activities.

1.13.1 ESA Cost-Effectiveness Working Group (CEWG)

The members participating in the Cost-Effectiveness Working Group (CEWG) include representatives from the following organizations:

- CPUC ED
- CPUC Office of Ratepayer Advocates (ORA)
- National Resources Defense Council (NRDC)
- The Utility Reform Network (TURN)
- TELACU / ACCES/ Maravilla
- Synergy Companies, and
- The IOUs.

D.16-11-022 instructed the CEWG to reconvene and address certain tasks. The CEWG completed its mandate in 2018 as follows:

- Presented a draft of the final Health, Comfort, and Safety (HCS) evaluation to the Low Income Oversight Board subcommittee. The Board had no comment.
- Received and incorporated one comment from the CPUC on the HCS evaluation.
- Met in person again in January, and subsequently via teleconference, to finalize the HCS evaluation and jointly outline a report on final recommendations.

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

The CEWG completed its Final Recommendations on June 1, 2018, and sent to the service list on June 13. Regarding the Adjusted Energy Savings Assistance Cost-Effectiveness Test (ESACET), the allocation of non-energy benefits (NEBs) and administrative costs to the measure level, ESA investment in other programs, and working with the IOUs on the scope of work for the 2018 NEB Study, the CEWG made the following recommendations:

- Not adopting the Adjusted ESACET, as it has minimal value beyond the already adopted ESACET.
- Changing the name of the Resource TRC test to the Resource Test and excluding from it non-resource measures that produce less than 1 kWh or 1 Therm of annual energy savings.
- Providing the results of the allocation exercise for NEBs and administrative costs to the 2018 NEB study. That study is tasked with recommending an allocation method and the results of this exercise will inform that effort.
- Not including any potential net benefit for providing enrollment leads to other programs in the cost effectiveness calculations at this time.
- Continuing the Health Comfort Safety Evaluation periodically as needed to inform program planning and NEB updates.
- Having the 2018 NEB study include the following objectives:
- Review and update the current set of NEBs
- Evaluate which NEBs can be estimated directly and which can be estimated through a function of energy savings or an alternate adder
- Review and assess the results of the HCS Evaluation
- Recommend any missing NEBs or negative non-energy impacts
- Provide a set of NEB calculations in a workbook that can replace the current workbook and can be easily updated in future program cycles
- Include sensitivity analysis in the calculations
- Recommend an allocation method for NEBs and administrative costs at the measure level, and
- Recommend an approach for updating NEBs in the future.

1.13.2 Multifamily Working Group (MFWG)

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

[12] D.16-11-022 and D.17-12-009, OP 62, 63, and 64.

The MFWG held four quarterly meetings in 2018, along with a few ad hoc meetings. Its members include, but are not limited to:

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

Some of the highlights were:

- Providing input on the IOUs' MF CAM implementation plans before filing Implementation Plan on March 1, 2018
- Discussing possible CARE expansion
- Discussing the potential of MF projects listed on Tax Credit Allocation Committee website, and
- Reviewing the IOUs' plan on the analysis of non-deed-restricted multifamily properties.

The MFWG has developed an Annual Progress Report, which describes its 2018 activities and is available online at **www.energydataweb.com.**

1.13.3 Mid-Cycle Working Group (MCWG)

The MCWG met several times in 2018. Participating members include representatives from the following organizations:

- CPUC ED
- CPUC Office of Ratepayer Advocates (ORA)
- The four California IOUs
- Energy Efficiency Council (EEC)
- TELACU, and
- Proteus.

The MCWG submitted its recommendations in June, 2018, for the tasks outlined below:

- For updates to the ESA Statewide Policy and Procedure Manual and the California Installation Standards Manual, and provide monthly and annual reporting criteria to align with D.16-11-022.
- Provided recommendations on the adoption of online data reporting systems (ODRS) for the ESA Program to help the IOUs and the CPUC understand better how these systems collect and report workforce data. This assessment should help to determine the value and the cost benefits of adopting ODRS for the ESA Program into IOU operations, and to identify any administrative burdens that adoption would cause for either contractors or utilities.
- For household retreatment prioritization models, implementation and

outreach strategies, and other aspects of the ESA Program.

- On how the ESA Program may be used to deploy tools to enable greater EE and Demand Response program participation by CARE and ESA participants in recognition of the increased State goals detailed in SB 350.

1.13.4 CARE Restructuring Working Group

The 2015 Residential Rate Proceeding[13] initiated a Phase 3, which, among other things, ordered:

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

A FERA Assistance workshop was held on January 28, 2018, during which each IOU presented methodologies and modeling techniques used to identify customers eligible for the CARE and FERA programs. In April, 2018, SCE submitted a report providing results of SCE's CARE / FERA propensity modeling, counts of excluded customers in hot climate zones, and the number of households that had received CARE marketing communications in the spring of 2017.

A scoping memo is anticipated in 2019 to address issues that will be covered in Phase 4 of the CARE Restructuring Program. SCE will continue to participate in any required workshops or activities to advance this effort.

Note: *A CARE Working Group was formed and worked through 2017 to identify and examine IOU data sets with the goal of presenting a consensus recommendation by January 31, 2018. In December 2017, at the request of ED staff, and after consultation with the working group, SCE filed a joint motion on behalf of parties to suspend the requirement that parties provide recommendations to be included in the IOU's 2018 Rate Design Window filings, citing other priorities associated with the proceeding. This suspension of the schedule was necessary due to parties' focusing on other priorities associated with R.12-06-013, and because the IOUs had recently concluded discussions with parties and the ED to finalize a consensus dataset, which is essential for further consensus-building discussions on potential CARE restructuring and reform concepts and measures.*

On December 20, 2017, ALJ Park issued a Ruling via e-mail granting the suspension of the CARE restructuring track until further notice.

1.13.5 Demand Analysis Working Group (DAWG)

D.17-12-009[14] identified the Demand Analysis Working Group, which includes representation from the California Energy Commission (CEC), California Independent System Operator (CAISO), IOUs, and other interested stakeholders.

[13] D.15-07-001, p. 298
[14] D.17-12-009, OP 8.

The DAWG acts as the forum for providing input into the scope, modeling, and analysis of results associated with the Energy Efficiency Potential and Goals Study. There was no low-income activity for 2018.

1.14 Annual Public ESA Program and CARE Meeting

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

In compliance with D.12-08-044, SCE and the other IOUs held a public meeting via Webinar on June 26, 2018, to present and discuss their 2018 CARE Program and ESA Program activities.

In compliance with D.17-12-009, the IOUs also co-hosted, with the California Department of Community Services and Development (CSD), a public meeting to report on their directed leveraging efforts.

1.15 Multifamily Properties

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

D.17-12-009 approved ESA unspent funds to treat common areas of deed-restricted multifamily (MF) properties where 65% of the tenants are income-eligible for ESA. Although no projects were completed in 2018, SCE analyzed non-deed-restricted MF properties within its service territory. The primary objective of this analysis is to assess the potential energy savings in non-deed-restricted MF properties with a high percentage[15] of low-income tenants and determine if the ESA Program should expand its provision of common area measures to support these MF properties in the future.

SCE's analysis included identifying all multifamily properties within the service territory and benchmark energy consumption. This approach will allow SCE to conduct a comparison among non-deed restricted properties (and deed-restricted properties, which are out of scope) utilizing a common set of data. The analysis used account and parcel data to calculate the energy use intensity (EUI) of kilowatt-hour (kWh) consumption per square foot and the benchmarking scores for each MF property.

The analysis identified 76 non-deed-restricted properties[16] in areas where at least 65% of the estimated population are at or below 200% FPG. These properties were identified by overlaying the current Athens Research data and were found

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

[16] SCE deemed properties as deed-restricted if they were listed on the Affordable Housing Rental Directory page of the California Department of Housing and Community Development website.

to have an average of 17,573 square feet and had a total 2018 annual consumption of 440,172 kWh; 48,827 kWh of which was attributed to common areas and 391,345 kWh was attributed to residential units.

SCE also checked previous ESA participation and time of last retrofit with Multifamily Energy Efficiency Rebate (MFEER) Program. Participation of MFEER is listed in the table below:

Table 1.15.1. Program Participation in ESA Program and MFEER

Year Last Treated	# of Properties Treated through ESA	Properties Treated through MFEER
2002	1	0
2004	1	0
2006	1	0
2008	1	0
2009	1	0
2010	2	0
2011	0	0
2012	2	0
2013	2	0
2014	1	1
2015	7	4
2016	4	2
2017	12	2
2018	16	3
Never Served	25	62
No Data found	0	2
TOTAL	76	76

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

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

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

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

D.16-11-022 required SCE to investigate coordination with the new Broadband Public Housing Account of the California Advanced Services Fund (CASF) to promote deployment of high-quality advanced communications services to all Californians, including those residing in public and multifamily housing. In 2018, SCE reached out to the California Foundation for Independent Living Centers (CFILC) to explore the feasibility of developing a joint mailer targeting low-income SCE customers who could qualify for CFILC's low-cost internet program. Further conversations to develop these efforts will continue in 2019.

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

2.1 CARE Executive Summary

In 2018, SCE's California Alternate Rates for Energy (CARE) Program continued to provide extensive outreach to income-eligible households to encourage program enrollment. The CARE Program provides a monthly discount on energy bills for income-qualified customers in residential single-family households as well as in sub-metered residential facilities, nonprofit group living facilities, agricultural employee housing facilities, and migrant farm worker housing centers.

This annual report provides information on SCE's CARE Program accomplishments and expenditures for the 2018 program year. At the end of the year 1,205,539 customers were on the CARE rate, resulting in a penetration rate of 85%. SCE continues to work towards meeting the Commission's directed CARE Program goals and objectives.

2.2 Participant Information

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

Table 2.2.1. Residential CARE Program Customers by Month

Residential CARE Program		
Electric Customers By Month		
PY 2018	**CARE Customers**	**Percentage Change**
January	1,224,623	-
February	1,214,651	-0.81%
March	1,224,701	0.83%
April	1,231,101	0.52%
May	1,227,683	-0.28%
June	1,229,611	0.16%
July	1,235,951	0.52%
August	1,243,471	0.61%
September	1,246,926	0.28%
October	1,234,611	-0.99%
November	1,212,306	-1.81%
December	1,205,539	-0.56%

2.2.2 Describe the Methodology, Sources of data, and Key Computations Used to Estimate the utility's CARE Penetration Rates by energy source.

SCE and the other California IOUs used the joint utility methodology adopted by the CPUC in D.01-03-028 for developing monthly penetration estimates in 2018. This method entails annual estimation of eligibility for CARE, ESA, and other income-by-household-size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

The requirements for 2018 eligibility, corresponding to the current estimation, again used the January Health and Human Services (HHS) Poverty Guidelines,[17] "bundling" one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327.

Sources for the estimation include:

- The current HHS guidelines
- Current-year, small area vendor marginal distributions on household characteristics
- Census 2010 SF3 data
- Census American Community Survey 2012-2016 Public Use Microdata Sample (PUMS) data
- Utility meter and master meter household counts
- Department of Finance Consumer Price Index series, and
- Various Geographic Information System sources.

An important change has been implemented since 2011, which involves adjusting small-area (block group) income distributions to match the latest American Community Survey distributions at the Public Use Microdata Area.

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

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

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

[17] Federal Register / Vol. 83, No. 12 /Thursday, January 18, 2018 /Notices; p.2643.

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

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

2.2.2.1 Describe How the Estimates of Current Demographic CARE-Eligibility Rates, By Energy Source for the pre-June 1st periods, were derived.

The joint utility methodology, as described above, was used throughout 2018.

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

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

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

2.2.2.3 Discuss how the Estimates of Current CARE-Eligible Households were developed.

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

2.2.2.4 Describe How Current CARE Customers Were Counted

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

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

2.2.2.5 Discuss how the elements above were used to derive the utility's CARE Participation Rates by Energy Source

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

2.2.3 Provide the Estimates of Current Demographic CARE-Eligibility Rates by Energy Source at Year-End.

- Electric: 32.5%
- Gas: N/A

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

2.2.4 Provide the Estimates of Current CARE-Eligible Sub-Metered Tenants of Master-Meter Customers by Energy Source at Year-End.

The estimate of current CARE-eligible sub-metered tenants of master-meter customers by energy source as of October 31, 2018 is 62,306.

2.2.5 Provide the Current CARE Sub-Metered Tenant Counts by Energy Source at Year-End

Electric: The current CARE sub-metered tenant count by energy source at year-end is 32,097.

2.2.6 Provide the Current CARE Sub-Metered Penetration Rates by Energy Source at Year-End

Electric: The current CARE sub-metered penetration rates by energy source as of October 31, 2018 is 53 percent.

2.2.7 Discuss any Problems encountered During the reporting period Administering the CARE Program for Sub-Metered Tenants and/or Master-Meter Customers

SCE continues to directly contact sub-metered tenants to expedite their recertification of CARE and Family Electric Rate Assistance (FERA) eligibility. This approach has proven to be more effective than the previous tactic of solely approaching mobile home park owners and/or managers in increasing tenant enrollments and recertification's.

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

2.3 CARE Program Summary

2.3.1 CARE Program Summary Costs

Table 2.3.1. CARE Program Summary Costs

CARE Budget Categories	Authorized Budget	Actual Expenses	% of Budget Spent
Outreach (includes Automatic Enrollment)	$2,684,843	$3,026,935	113%
Processing, Certification, Recertification [1]	$900,000	$1,001,253	111%
Post-Enrollment Verification [2]	$800,000	$815,749	102%
Information Tech./Programming	$1,150,000	$1,002,194	*87%*
Pilots	$525,000	$554,891	106%
Measurement and Evaluation	$–	$0	0%
Regulatory Compliance [2]	$470,400	$325,969	69%
General Administration	$684,009	$609,509	89%
CPUC Energy Division Staff	$140,000	$73,815	53%
Cooling Centers	$43,264	$24,749	57%
Total Expenses [1]	$ 7,397,516	$7,435,063	101%
Subsidies and Benefits	$482,397,965	$376,226,811	78%
Total Program Costs and Discounts	$489,794,874	$383,661,874	78%

[1] Represents the authorized budget approved on January 4, 2019 per AL 3824-E

[2] Includes 2013-2015 CARE/ESA CPUC Audit invoice recorded in 2018 of $61,425

2.3.2 CARE Program Penetration Rate to Date

Table 2.3.2. CARE Program Penetration

Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
1,205,539	1,422,225	84.8%	No

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

Following are descriptions of the six (6) CARE recertification inquiries in 2018:
A customer contacted our Consumer Affairs department after being removed from

the CARE rate due to non-response to the recertification request. SCE records indicate several additional, unsuccessful attempts had been made to follow up with the customer before removal. This customer has not been placed back on the rate pending return of recertification documentation.

- A customer was removed from the CARE rate due to non-response to the recertification request. SCE contacted the customer, who stated they were not alerted to the need to recertify and that they live in a rural area where mail delivery is unreliable. This customer was granted payment arrangements and placed back on the CARE rate on January 23.
- After being removed from CARE discount rate, a customer contacted SCE and was informed that he did not respond on time to the CARE recertification request. After contacting the CPUC, the customer was referred back to SCE, where it was discovered that the customer did not receive his recertification packet because he had failed to update his contact information. After providing all recertification forms, this customer was placed back on the CARE rate retroactively, effective June 25, 2018.
- A customer received a CARE rate eligibility rejection letter after returning SCE's declaration form indicating "No Income." After contacting the CPUC and explaining that they had been living off an existing savings account, SCE provided the customer with its Affidavit of No Income Form. After completing the Affidavit of No Income Form, customer was placed back on the CARE rate as of July 25, 2018.
- On August 8, 2018, SCE Consumer Affairs contacted an upset customer to address the customer's concern about being removed from the CARE discount rate in late 2017 for failure to respond to several recertification requests. The customer had contacted SCE in May 2018 and was offered reinstatement into the program, but he refused. After the August 8 call with Consumer Affairs, the customer re-applied for the CARE Program and received the discounted rate as of July 25, 2018.
- A CARE customer contacted SCE Consumer Affairs after being removed from the CARE rate after the 90-day response time had expired. The customer indicated that he had returned the recertification form on two separate occasions; however, SCE records indicated that neither form had been received. The customer was immediately, over the phone, re-enrolled into the CARE Program and continued to receive the discount without interruption.

2.4 CARE Program Costs

2.4.1 Discount Cost

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

The average monthly discount per CARE customer was $25.44.

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

- Electric Subsidy: $376,226,811
- The annual subsidy (discount) for all CARE residential program customers was $376,226,811

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

In 2018 the number of CARE customers on GTSR was 79 and the percentage was 8%.[18]

The average total bill discount of CARE-enrolled GTSR customers received (in percentage terms) from the CARE Program discount on the delivery portion of their bill: 16%.

The average total bill discount of CARE-enrolled GTSR customers received (in percentage terms) from the CARE Program an overall discount on their bill: 29%.

[18] SCE does not have any CARE customers enrolled in the Enhanced Community Renewable Program

2.4.2 Administrative Costs

2.4.2.1 Show the CARE Residential Program's Administrative Cost by Category.

See ***Section 2.3.1,*** above.

2.4.2.2 Explain what is included in each Administrative Cost Categories

The requested information is provided in Table 2.4.2, following:

Table 2.4.2. CARE Administrative Cost Categories

Category	Description
Outreach	Includes: Bill inserts, advertising, applications (printing and mailing), posters, brochures, flyers, postage, other outreach, staff labor, costs related to outbound dialing, 800#, and Capitation Fee Project.
Processing, Certification, and Recertification	Includes: Staff labor, information technology, application processing, training, programming labor, and sub-meter certification.
Post Enrollment Verification (PEV)	Includes: Staff labor, information technology, verification processing, training, programming labor, and sub-meter verification.
Information Technology (IT) / Programming	Includes: Programming and labor costs associated with system enhancements, Decision compliance, and maintenance of existing processes.
Pilots	Includes: Cost of Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) program.
Cool Centers	Includes: Refreshments and personal cooling devices for Cool Center attendees, and system updates for geolocation webpage.
Measurement & Evaluation	Needs Assessment Study
Regulatory Compliance	Includes: Applications, testimony, advice filings, comments and reply comments, hearings, reports and studies, working group meetings, public input meetings, and tariff revisions.
General Administration	Includes: Office supplies, market research, program management labor (including pensions and benefits), and technical support and software licensing.
Commission Energy Division Staff Funding	Includes: CPUC Energy Division Staff expenditures.

2.4.3 Year-End (December 31, 2018) Balance for the CARE Balancing Account

- Electric CARE: $8,064,934.85.
- 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, 2018 was $8 million.

2.4.4 Cost Categories Recorded in the CARE Balancing Account and Included in Base Rates.

SCE does not recover CARE-related costs in base rates. In D.97-08-056, the CPUC allocated SCE's administrative costs associated with the CARE Program to SCE's Public Purpose Programs rate component. D.02-09-021[19] required SCE to establish a CARE balancing account (CBA) to record the following on a monthly basis:

1. The difference between CARE discounts provided to CARE-eligible customers and CARE surcharges billed to non-CARE customers
2. The difference between the authorized CARE and FERA administration amounts and actual incurred CARE and FERA administration expenses
3. Costs associated with the CARE automatic enrollment program, and
4. Costs associated with the Energy Division's audit of SCE's CARE Program.

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

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

See Table 2.4.5, below.

Table 2.4.5: CARE Surcharge and Revenue Collected by Customer Class (2018)

Customer Class	Average Monthly CARE Surcharge	Average Monthly Bill	CARE Surcharge as Percentage of Bill	Total Annual CARE Surcharge Revenue Collected	Percentage of Total Annual CARE Surcharge Revenue Collected
Residential[20]	$9,069,578	$417,360,256	2.2%	$108,834,936	28.3%
Agricultural	$683,223	$18,810,069	3.6%	$8,198,679	2.1%
Commercial	$17,746,051	$465,993,632	3.8%	$212,952,615	55.4%
Industrial	$2,860,195	$48,108,443	5.9%	$34,322,344	8.9%
Public Authority	$1,650,685	$40,279,328	4.1%	$19,808,221	5.2%
Railroads	$36,106	$997,960	3.6%	$433,278	0.1%
Interdepartmental[21]	$423	$18,701	2.3%	$5,072	0.0%
Totals	$32,046,262	$991,568,389	3.2%	$384,555,145	100.0%

2.5 Outreach

2.5.1 Discuss Utility Outreach Activities and Those Undertaken by Third Parties on the utility's Behalf, Including Lifeline Coordination

The outreach efforts of the CARE and FERA Programs and communications to SCE's in-language and under-penetrated areas continued to be a priority in 2018. SCE's CARE and FERA Programs partner with internal SCE departments such as Public Affairs, Consumer Affairs, Customer Experience Management, Corporate Communications, Community Involvement, and Speakers Bureau, and with employee volunteer-based Resource Groups. These programs also partner with external organizations, such as foundations, faith-based organizations, and community-based organizations, in outreach activities that target SCE's hard-to-reach customer base.

SCE's goal is to enroll as many eligible customers as are willing to participate in CARE. CARE enrollment decreased from 1,222,526 on December 31, 2017, to

[20] Excludes CARE customers.
[21] Electricity supplied for Edison-owned water & gas operations on Santa Catalina Island.

1,205,539 on December 31, 2018, which represents a net decrease of 16,987.

In 2018, SCE hosted several events celebrating Black History Month, Asian American Pacific Islander Month, and Hispanic Heritage Month in the communities we serve, rather than asking the communities to come to SCE at our Irwindale Energy Education Center, as in previous years. These events provided a wealth of information on the programs and services available to customers, businesses, and nonprofit organizations, including the CARE, FERA, and ESA Programs. This strategy builds program awareness at a grassroots and community level where many income-qualified households may connect.

SCE also participated in more than 140 community events during 2018, targeting customers seeking information on bill payment assistance through rate assistance and energy savings. At events including, but not limited to, senior and faith-based community events, Earth Day festivals, and winter festivals, nearly 30,000 customers received information on the CARE, FERA, and ESA Programs as ways to help lower their energy usage and electric bills.

In May 2018 SCE and the other IOUs met with the CPUC LifeLine Administrator to discuss implementing a data sharing process to generate leads for LifeLine program. An electronic file containing CARE Program participants' customer-specific data would be provided to LifeLine Administrator on a bi-annual basis. The first transfer was provided in January 2019.

SCE will continue to collaborate with Lifeline and discuss additional leveraging efforts. In 2019, SCE plans to provide direct links from the CARE, FERA, and ESA Program pages of its public website, SCE.com, to the main Lifeline enrollment web page. This will allow SCE customers to get Lifeline program information by simply clicking a link.

2.5.1.1 The CHANGES Pilot Program

The Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program was initially approved by the Commission as a one-year pilot program.[22] D.15-12-047 approved the establishment of the CHANGES as an ongoing statewide program, effective January 1, 2016[23]. The program provides outreach, education, and bill issue assistance to limited English proficient customers. The program is administered through a contract with the CPUC, using the same community contractor, Self Help for the Elderly, and 28 CBOs, which also administer the CPUC's Telecommunications Education and Assistance in Multiple-Languages (TEAM) program.

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

[22] Approved November 19, 2010, Resolution CSID-004
[23] D.15-12-047 p.1.

1. ACC Senior Services
2. Afghan Coalition
3. Alliance for African Assistance
4. American Relief Society
5. Asian American Resource Center
6. Asian Community Center
7. CASA Familiar
8. Central California Legal Services
9. Centro la Familia Advocacy Services, Inc.
10. Chinatown Service Center
11. Chinese Newcomers Service Center
12. Deaf Community Services of San Diego
13. Delhi Center
14. El Concilio of San Mateo County
15. Fresno Center for New Americans
16. Good Samaritan Family Resource Center
17. International Institute of Los Angeles International Rescue Committee
18. Korean American Community Services
19. Koreatown Youth And Community Center
20. Lao Khmu Association, Inc.
21. Little Tokyo Service Center
22. Madera Coalition for Community Justice
23. Portuguese Community Center
24. Self-Help for the Elderly
25. Southeast Asian Community Center
26. SUSCOL Intertribal Council
27. Southland Integrated Services

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

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

- **Education**: The education component includes trainings, workshops, and/or one-to-one technical assistance for customers on various topics, such as avoiding disconnections, payment arrangements, assistance programs available, how to read a utility bill, tiered rates, and energy conservation.
- **Dispute and Need Resolution**: CBOs work directly with customers and utilities to assist with issues such as bill inquiries, payment arrangements, avoidance of service disconnections, and restoration of service. The current CHANGES program provides assistance in 36 languages.

- **Outreach**: CBOs leverage the existing TEAM outreach activities as an opportunity to introduce information about CHANGES, provide new energy-related materials, and market the program via various media outlets.

In 2018, based on the program administrator's monthly reports, CHANGES completed the activities shown in Table 2.5.1-a, below for SCE:

Table 2.5.1a Activity: Disputes Resolved: By Service

SCE -- Disputes Resolved	
Add Level Pay Plan	2
Assisted with CARE Re-Certification/Audit	1
Changed 3rd Party Company	2
Consumer Education Only (must be pre-approved)	1
Medical Baseline Application	0
Enroll in Energy Assistance Programs	19
Request Meter Service or Testing	0
Request Bill Adjustment	4
Request Customer Service Visit	0
Schedule Energy Audit	0
Payment Extension	21
Payment Plan	57
Solar	5
Stop Disconnection	44
Time of Use	5
Wildfire Related Issue	0
TOTAL	**161**

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

Table 2.5.1b Activity: SCE Disputes Resolved: By Language

SCE -- Disputes Resolved by Language	
English	56
Eritrean	1
Farsi	1
French	3
Korean	2
Mandarin	2
Samoan	1

SCE -- Disputes Resolved by Language	
Spanish	46
Tagalog	1
Vietnamese	2
TOTAL	**115***

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

Table 2.5.1c. Activity: Needs Assistance: By Service

SCE – Needs Assistance	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	9
Assisted with Changes to Account	18
Energy Efficiency Tool	4
Assisted High Energy User with CARE Doc Submission	1
Assisted with Reconnection	1
Billing Language Changed	0
Consumer Education Only	0
Electricity Aggregation	1
Energy Alerts	0
Energy Assistance Fund (SCE)	69
Energy Assistance Fund (PG&E)	0
Enrolled in Demand Response Programs	0
ESAP	32
Gas Assistance Fund (SCG)	0
HEAP	352
Medical Baseline	31
Neighbor to Neighbor (SDG&E)	0
REACH	0
Reported Safety Problem	1
Reported Scam	1
Set Up 3rd Party Notification	0
Set Up New Account	1
Payment Extension	28
Payment Plan	23
Wildfire Related Issue	0
TOTAL	**572**

SCE – Needs Assistance by Language	
Arabic	7
Armenian	1
Cantonese	91
English	94
Hindi	1
Japanese	2
Korean	54
Mandarin	15
Pashto	1
Punjabi	1
Spanish	163
Tagalog	2
Vietnamese	140
TOTAL	**572**

2.5.1.2 Marketing

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

- IQP and other assistance programs (CARE, FERA, ESA, Level Pay Plan and Medical Baseline) were featured in customers' monthly electric bill "onserts" — pre-printed newsletter-type communications — with articles providing resources to help reduce their electricity bills.
- Throughout 2018, SCE continued to reach out to potentially eligible non-CARE customers in an effort to enroll them in CARE or FERA. Targeted, direct-to-consumer mailings were sent to households on a quarterly basis, leveraging advanced analytics based on previous responses to fine-tune the targeting process.
- As part of the rate-discount annual solicitation process in June 2018, SCE included CARE / FERA enrollment applications in the bills of over two million customers receiving a paper bill (but not those receiving bills online). Because of this effort, nearly 7,141 new households began receiving the CARE rate discount.
- SCE's Customer Contact Center continues to employ the CARE / FERA enrollment application on the public website, SCE.com, either to directly enroll customers into the CARE Program by telephone, or to offer to mail a rate discount application to the customer. In 2018 more than 63,000 eligible

low-income customers were enrolled through Call Center outreach efforts, including both all web enrollments and Call Center-mailed applications.

- CARE enrollment is coordinated with other low-income programs such as ESA, SCE's Energy Assistance Fund (EAF) Program, LIHEAP, SoCalGas Company's income qualified programs, and programs run by certain water utilities. ESA participants are automatically enrolled in CARE each month and LIHEAP participants are automatically enrolled in CARE each quarter. In 2018, nearly 61,000 eligible customers were enrolled in CARE through data sharing with LIHEAP, ESA, EAF, SoCalGas, and water utilities. The CARE Program continuously integrates its efforts and messaging with the ESA program at all outreach events, communications, and marketing campaigns.
- The CARE / FERA Capitation Fee Program team is continuing its efforts to re-engage existing capitation agencies while strategically registering additional contractors to overcome enrollment barriers, including language, culture, and special needs, as a means of enrolling the hardest-to-reach customers. As a result of these efforts, the Capitation Fee Program continues to show increased enrollments from agencies that were previously inactive. In 2018, capitation contractors successfully enrolled 505 new customers in the CARE Program.
- SCE enrolls new CARE customers through the EAF Program, which provides utility bill payment assistance through voluntary customer, employee, and SCE shareholder donations. EAF Program income requirements are the same as those for CARE. In 2018, 673 EAF recipients were enrolled in the CARE Program.

2.5.1.3 Paid Media (Advertising)

The 2018 IQP advertising campaign employed digital banners (desktop and mobile), Search Engine Marketing (SEM) placements, social posts, and newspaper insertions. Digital media ads were placed through RhythmOne, a top-performing advertising network. The campaign generated over 108.5 million impressions targeting General Market (GM), Asian (Chinese, Korean, Vietnamese and Filipino), Hispanic, and African American audience segments.

- **Display:** Desktop display and mobile placements targeted GM, Asian, Hispanic, and African American segments with a household income less than $75,000. The desktop and mobile placements delivered over 52.6 million impressions and an overall conversion rate of 0.08%. All ethnic placements performed above the conversion rate benchmark of 0.09%, except GM, which lowered the overall rate. Display also delivered about 44,000 clicks at a click-through-rate (CTR) of 0.08% across ESAP and Joint IQP

(Rate Discount and ESA) flights. Please note that CTR was not a key performance indicator (KPI) for this year's campaign.

- **Search Engine Marketing:** SEM Targeted Spanish and English-speaking customers throughout SCE's service territory and delivered 849,554 impressions, 58,383 clicks and a 6.87% click-through rate (CTR). We saw a 29.4% increase in SEM CTR performance in 2018 compared to 2017.
- **Social:** Ads were placed across Twitter, Facebook, and Instagram. Twitter garnered a 0.36% CTR overall, with General Market at 0.31% CTR and Hispanic at 0.42% CTR. Facebook / Instagram delivered a 0.87% CTR overall, with the ESA Program at 1.29% CTR and Joint IQP at 0.81% CTR.
- **Print:** Two hundred and fifty-five (255) insertions were placed across 32 publications targeting the Hispanic, African American, and Asian (Chinese, Korean, Vietnamese) audience segments. The print campaign delivered over 44.5 million impressions.

GENERAL MARKET

The advertising campaign launched June 19 and ran through December 31, 2018. General Market media delivered a total of 36,243,587 impressions.

Digital Display Summary:

Advertising ran for both ESA and Joint IQP:

- ESAP placements delivered 11,988,001 impressions, with a Conversion rate of 0.05% and a CTR of 0.07%
- Joint IQP placements delivered 18,065,020 impressions, with a Conversion rate of 0.05% and a CTR of 0.06%

Advertising ran on both Desktop and Mobile platforms:

- Desktop placements delivered 16,402,179 impressions, with a Conversion rate of 0.05% and a CTR of 0.04%
- Mobile placements delivered 13,650,842 impressions, with a Conversion rate of 0.06% and a CTR of 0.09%

AFRICAN AMERICAN MARKET

The advertising campaign launched June 19 and ran through December 31, 2018. African American media delivered a total of 8,356,077 impressions.

Digital Display Summary:

Advertising ran for both ESAP and Joint IQP:

African American:

- ESAP placements delivered 1,597,962 impressions, with a Conversion rate of 0.13% and a CTR of 0.13%
- Joint IQP placements delivered 2,304,115 impressions, with a Conversion rate of 0.12% and a CTR of 0.12%

Advertising ran on both Desktop and Mobile platforms:

African American:

- Desktop placements delivered 2,136,708 impressions, with a Conversion rate of 0.12% and a CTR of 0.10%
- Mobile placements delivered 1,765,369 impressions, with a Conversion rate of 0.13% and a CTR of 0.15%

ASIAN MARKET

The advertising campaign launched June 19 and ran through December 31, 2018. Asian media delivered a total of 24,041,685 impressions.

Digital Display Summary:

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

- **Chinese** delivered 3,379,091 impressions, with a Conversion rate of 0.12% and a CTR of 0.11%
- **Vietnamese** delivered 3,111,654 impressions, with a Conversion rate of 0.12% and a CTR of 0.11%
- **Filipino** delivered 2,856,842 impressions, with a Conversion rate of 0.13% and a CTR of 0.11%
- **Korean** delivered 3,370,958 impressions, with a Conversion rate of 0.10% and a CTR of 0.10%

Advertising ran on both Desktop and Mobile platforms:

Chinese

- Desktop placements delivered 1,836,787 impressions, with a Conversion rate of 0.11% and a CTR of 0.09%
- Mobile placements delivered 1,542,304 impressions, with a Conversion rate of 0.12% and a CTR of 0.13%

Vietnamese

- Desktop placements delivered 1,697,736 impressions, with a Conversion rate of 0.11% and a CTR of 0.09%
- Mobile placements delivered 1,413,918 impressions, with a Conversion rate of 0.13% and a CTR of 0.13%

Filipino

- Desktop placements delivered 1,555,414 impressions, with a Conversion rate of 0.12% and a CTR of 0.10%
- Mobile placements delivered 1,301,428 impressions, with a Conversion rate of 0.13% and a CTR of 0.13%

Korean

- Desktop placements delivered 1,837,974 impressions, with a Conversion rate of 0.09% and a CTR of 0.08%
- Mobile placements delivered 1,532,984 impressions, with a Conversion rate of 0.12% and a CTR of 0.12%

HISPANIC MARKET

The advertising campaign launched June 19 and ran through December 31, 2018. Hispanic media delivered a total of 37,204,009 impressions.

Digital Display Summary:

Advertising ran for both ESAP and Joint IQP:

- ESAP placements delivered 2,890,307 impressions, with a Conversion rate of 0.13% and a CTR of 0.12%
- Joint IQP placements delivered 3,072,810 impressions, with a Conversion rate of 0.10% and a CTR of 0.09%
- Advertising ran on both Desktop and Mobile platforms:
- Desktop placements delivered 3,245,755 impressions, with a Conversion rate of 0.10% and CTR of 0.08%
- Mobile placements delivered 2,717,362 impressions, with a Conversion rate of 0.13% and a CTR of 0.14%

Owned Media (InsideEdison.com Stories)

In 2018, ENERGIZED by Edison (formerly InsideEdison.com) posted three stories related to our CARE/ESAP programs:

- New Income Guidelines May Help More Customers Stretch Energy Dollars (translations in Chinese, Khmer, Korean, Spanish, and Vietnamese): 2,747 page views

- Mobile Home Park Residents to Save Money, Energy in New Pilot Program: 1,523 page views
- 6 Ideas for Energy-Saving Holiday Gifts (includes info on EAF): 888 page views

Earned Media

In 2018, coverage of SCE's IQPs resulted in 13 earned media stories, four (4) in Asian media outlets, three (3) in Hispanic media, 2 in African American, and 4 in general media:

- December 14, 2018, KPCC-FM: KPCC-FM reports some SCE customers "at risk of being disconnected" including customers age 65 and older, and low-income customers who need medical assistance, can get some protections to keep their lights on.
- September 15, 2018, Asian Journal (page 21 and 22), *available at* https://www.asianjournal.com/community-newspapers/los-angeles-weekend-edition-september-15-18-2018/ Summary: Coverage from the "Preparing For Emergencies In Advance Can Be A Lifesaver" Inside Edison story.
- August 12, 2018, KCEL-FM and KUTY-AM SCE's Robert Villegas discussed income-qualified programs and called them "key for customers that need assistance at this time of year when energy consumption and bills rise due to the increased energy used for air condition." (Ethnic/Spanish)
- June 24, 2018, KFNY-AM: Metallic Balloon Safety, IQPs and Scams Discussed in a 30-minute interview in Spanish with KFNY-AM Riverside, CA. Edison's Robert Villegas elaborates on how to safety handle metallic balloons and the increased income guidelines of SCE's Income Qualified Programs. Villegas encouraged listeners to check whether they qualify under the new higher income guidelines which was especially important for seniors and others on a fixed income. (Ethnic/Spanish)
- June 22, 2018, Simi Valley Acorn: Low-Income Residents Can Apply for electric Power Discount Programs (General media).
- June 14, 2018, Siam News: New Income Guidelines May Help More Customers Stretch Energy Dollars. Outlines an assortment of income-qualified programs that could help more SCE customers qualify for financial assistance. (Ethnic/Asian)
- June 13, 2018, Idyllwild Town Crier: New Income Guidelines May Help More Customers Stretch Energy Dollars. Coverage of 2018-20 Income Qualified Programs' new guidelines and how customers may qualify for reduced utility bill, energy-efficient replacement refrigerators and other products and services. (General Market)

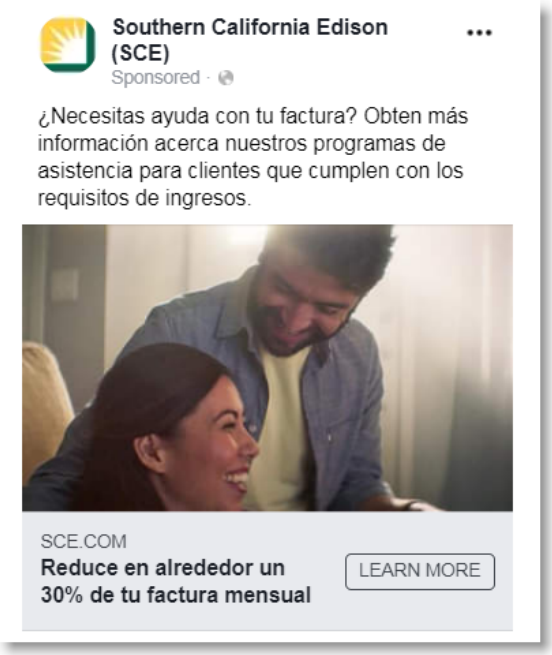
- June 11, 2018, Korea Daily: New Income Guidelines May Help More Customers Stretch Energy Dollars. (Ethnic/Asian)
- June 9, 2018, Viet Bao Daily News: New Income Guidelines May Help More Customers Stretch Energy Dollars Coverage of 2018-20 Income Qualified Programs' new guidelines and how customers may qualify for reduced utility bill, energy efficient replacement refrigerators and other products/services. (Ethnic/Asian)
- June 9, 2018, Orange County Breeze: New Income Guidelines May Help More Customers Stretch Energy Dollars Coverage of 2018-20 Income Qualified Programs' new guidelines and how customers may qualify for reduced utility bill, energy efficient replacement refrigerators and other products/services. (General market)
- June 7, 2018, L.A. Sentinel - New Income Guidelines May Help Customers Stretch Energy Dollars. Coverage of 2018-19 Income Qualified Programs' new guidelines and how customers may qualify for reduced utility bill, energy efficient replacement refrigerator and other products/services. (Ethnic/African American)
- June 7, 2018, Watts Times: New Income Guidelines May Help Customers Stretch Energy Dollars. Coverage of 2018-19 Income Qualified Programs' new guidelines and how customers may qualify for reduced utility bill, energy efficient replacement refrigerator and other products/services. (Ethnic/African American)

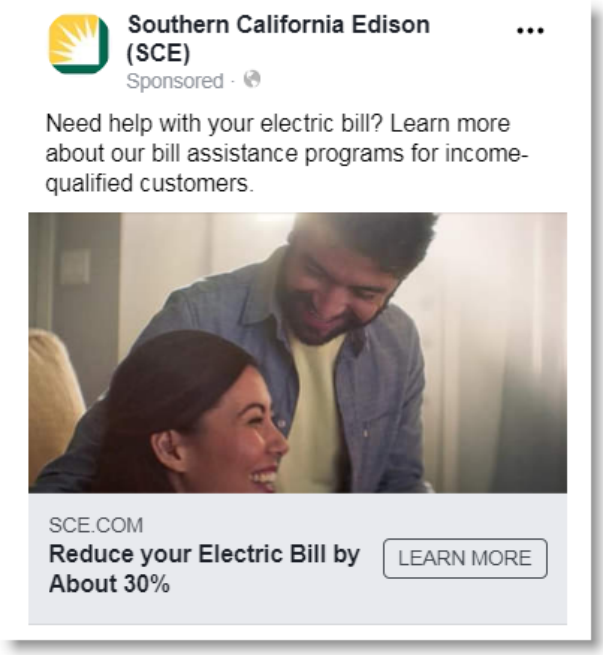
Social Media (Advertising)

In 2018, social media was used to launch Income Qualified Ads to promote the California Alternate Rates for Energy CARE, FERA, and ESA Programs:

- Customers were made aware of the income qualified programs through link updates on Facebook, Instagram, and Twitter which directed customers to the respective programs' websites for more information.
- The ads, in English and Spanish, were targeted to customers with household incomes of $30,000 to $70,000 and were in flight throughout the months of June to November 2018.
- SCE spent $67,000 on Facebook and Instagram ads and a total of $9,000 on Twitter.
- The campaign on Facebook and Instagram generated over 7.2 million impressions and more than 62,800 website clicks on the respective programs' landing pages. Of these, 2.6 million were Spanish-speaking customers on Facebook.
- On Twitter, the English-language CARE / FERA ads generated more than 593,000 impressions and drove more than 1,868 people to the program landing page.
- Among Spanish-language users on Twitter, the CARE / FERA ads

generated more than 356,000 impression and sent more than 1,500 people to the program landing page.





SCE
@SCE
Need help with your electric bill? Learn more about our bill assistance programs for income-qualified customers.
Reduce Your Electric Bill by About 30%
sce.com
10:21 AM - 25 Jun 2018

SCE en Español
@SCE_Espanol
¿Necesitas ayuda con tu factura? Obten más información acerca nuestros programas de asistencia para clientes que cumplen con los requisitos de ingresos.
Translate Tweet
Reduce en alrededor un 30% de tu factura mensual
sce.com

SCE
@SCE
Need help with your electric bill? Learn more about our bill assistance programs for income-qualified customers.
Reduce your Electric Bill by About 30%
sce.com
1:31 PM - 28 Nov 2018

SCE en Español
@SCE_Espanol
¿Necesitas ayuda con tu factura? Obten más información acerca nuestros programas de asistencia para clientes que cumplen con los requisitos de ingresos.
Translate Tweet
Reduce en alrededor un 30% de tu factura mensual
sce.com
10:24 AM - 25 Jun 2018

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

SCE uses a Randomized Control Trial experimental designed to select customers who will receive a Home Energy Report (HER). In 2018 there were 375, 249 CARE customers who received HERs. Thirty-one percent (31%) of the CARE population received HERs, exceeding the 2018 CPUC mandate of 15%.

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

Using the percentage of approved applications by volume from various outreach methods, SCE's four (4) most effective outreach methods in 2018 were:

1. General enrollment efforts, which generated 25% of all enrollments. These outreach efforts include the Capitation Fee Project and enrollments through third-party interactive voice response campaigns.
2. Call Center enrollment efforts, which generated 38% of all enrollments.
3. Collateral materials, distributed at community outreach events, directing customers to SCE's website for additional program information, including how to enroll online.
4. Strategic page placement of assistance program information and direct links on the SCE.com website to appeal to customers using the Internet:
    - Customer enrolling via Internet generated 20% of all enrollments, and
    - Internal and external data-sharing efforts generated 19% of all enrollments.

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

Through many outreach, marketing, and awareness campaigns, SCE has been persistent in its ongoing efforts to reach and enroll customers. Significant outreach efforts in 2018 included, but were not limited to:

- Active recruitment of new CARE Capitation agencies
- Multilingual outreach
- Use of ethnic and general market media, and
- Designing CARE marketing materials and correspondence to reach increasing numbers of ethnic populations and under-penetrated geographic areas.

SCE ended the 2018 program year at 85% penetration and will continue to vigorously market the program to achieve the 90% penetration rate goal.

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

SCE continued collaborating with SoCalGas, and local water utilities, as directed in D.11-05-020, to share CARE participant data electronically in order to help customers enroll in each utility's program. In 2018, approximately 56,000 customers were enrolled in SCE's CARE rate through data sharing with these utilities.

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

Contractors who perform ESA Program assessment services assist qualified customers in completing a CARE application. Through this effort 2,537 customers enrolled in CARE during 2018. The CARE Program continually integrates its efforts and messaging with the ESA Program at all outreach events, communications, and marketing campaigns. SCE also enrolled 673 new CARE customers through the EAF program, which provides utility bill payment assistance to customers through voluntary customer, employee, and shareholder donations.

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

SCE utilizes the Capitation Fee Project as a channel to coordinate with service providers of related low-income programs to reach out and provide one-on-one assistance to SCE's hardest-to-reach customer base. In 2018, SCE partnered with food banks, clothing distribution centers, employment workshops, farmers' markets, faith-based and community-based publications, school events, and community fairs to coordinate the CARE Program with their related services.

Each quarter, LIHEAP payment recipients were automatically enrolled in CARE, which generated 2,955 enrollments in 2018.

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

To pave the way for the technology which will allow customers to view their end-use and electric usage profiles, SCE began in 2017 to offer mobile optimized IQP pages, available in My Account and SCE.com. In 2018, the cost to complete this effort was $270,782.56.

2.5.7 Describe the process for cross-referral of low-income customers between the utility and CSD. Describe how the utility's CARE customer discount information is provided to CSD for inclusion in its federal funds leveraging application. (Note: These agreements are limited to sharing 1-800 phone numbers with customers and providing CARE benefit information for the federal fiscal year, October 1 of the current year through September 30 of the subsequent year. There are no tracking mechanisms in place to determine how many customers contact the other programs or actually become enrolled in other program(s) as a result of these agreements).

A copy of SCE's ongoing agreement with CSD was filed in 2001 with SCE's 2000 CARE Annual Progress Report. SCE includes the following language on its individually metered customer CARE application for cross-referral of low-income customers to CSD:

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

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

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

SCE remains steadfast in its commitment to promoting a robust culture of evidence as it continues to leverage advanced statistical techniques and methodologies in enhancing its business operations, highlighting the indispensable and influential role played by data in shaping programs and policies aimed at responding more effectively to the needs of low income households. In particular, predictive analytics will serve as a fundamental tool in enhancing customer acquisition as it will continue to identify customers with a significant propensity to be approved or recertified for CARE or FERA, considering the unique configuration of socioeconomic and demographic characteristics that distinguish these two populations. Additionally, multivariate statistical models will ascertain CARE customers most likely to be treated with energy efficiency measures from the ESA program. Equally important, disproportionate stratified random sampling will continue to be employed in the selection of customers in the monthly samples for verification, sharply focusing on oversampling customers with the greatest proclivity to fail eligibility requirements. A vital component of that operation involves analyzing the results of these requests for verifications

aimed at further refining the framework that guides the random sampling.

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

2.6 Processing CARE Applications

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

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

2.6.2 Describe any contracts the utility has with Third Parties to Conduct Certification, Re-Certification and/or Verification on the utility's behalf. Describe how these third-party efforts compare to the utility's efforts in comparable customer segments, such as hard-to-reach or under-served. Include comparisons of Effectiveness and Cost-Effectiveness of comparable customer segments, if available.

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

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

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

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

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

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

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

	Enrolled	Outreach Cost	Cost per Enrollment
SCE [1]	307,563	$3,014,159	$9.80
Capitation Fee Project [2]	505	$12,776	$25.30

[1] Includes all costs including capitation fees. Does not include enrollments from EMA contractors as they do not have an unbundled fee for a CARE enrollment. Does not include FERA expenses.
[2] Does not include FERA expenses.

In addition, SCE can make a comparison to effectiveness. Table 2.6.2-B, below, compares the approval percentages among SCE enrollment activities and the third-party Capitation Fee program / ESA contractors.

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

Enrollment Activity	Received	Approved	Percent
SCE			
SCE Call Center Requests	41,541	26,158	63%
SCE Direct Mail	75,433	49,414	66%
Special Projects and/or Events	50,462	48,000	95%
Internet Enrollments	63,583	63,243	99%
PG&E Data Exchange	-	-	-
SWG Data Exchange	-	-	-
SoCalGas Data Exchange	56,907	55,762	98%
Water Utilities Data Exchange	5	5	100%
DCSD Automatic Enrollment	2,955	2,955	100%
Other Miscellaneous Sources	-	-	-
Third Parties			
Capitation Fee Project	594	505	85%
ESA Contractors	2,537	2,537	100%

2.7 Program Management

2.7.1 Discuss Issues and/or Events that Significantly Affected Program Management in the reporting period and how these were addressed.

In 2018, there were no significant issues and/or events that impacted program management.

2.8 Pilots

In 2018, there were no significant issues and/or events that impacted pilots.

2.9 Studies

In 2018, there were no significant issues and/or events that impacted studies.

3. CARE Expansion Program

3.1 Participant Information

3.1.1 Provide the total Number of Residential and/or Commercial Facilities by month, by energy source for the reporting period.

Table 3.1.1. CARE Expansion Program — Participating Facilities by Month

2018	CARE Residential Facilities	CARE Commercial Facilities	Total
January	366	159	**525**
February	359	156	**515**
March	354	156	**510**
April	353	156	**509**
May	351	155	**506**
June	352	155	**507**
July	358	150	**508**
August	353	152	**505**
September	343	153	**496**
October	339	154	**493**
November	338	154	**492**
December	335	154	**489**

3.1.1.1 Total Number of Residents

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

Table 3.1.1.1. Numbers of Residents

Facility Type	Established in 2018		Recertified in 2018		Closed in 2018	
	Service Accounts	No. of Beds	Service Accounts	No. of Beds	Service Accounts	No. of Beds
Residential	58	747	37	285	21	139
Commercial	8	272	5	241	5	224
TOTAL	**66**	**1,019**	**42**	**526**	**26**	**363**

3.2 Usage Information

3.2.1 Provide the Average Monthly Usage by Energy Source per Residential facility and per Commercial Facility.

Table 3.2.1a. Average Monthly Usage by Energy Source

Commodity	Residential	Commercial
Gas	N/A	N/A
Electric	999	11,515

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

Customer	Gas Therms	Electric KWh
Residential Facilities	N/A	999
Commercial Facilities	N/A	11,515

3.3 Program Cost

3.3.1 Administrative Cost (show the CARE Expansion Program's Administrative Cost by Category).

3.3.1.1 Discount Information

See Table 2.3.1, CARE Program Summary Costs.

3.3.1.2 State the Average Annual CARE Discount Received per Residential Facility by energy source

Residential Facility Electric Discount: $773.78

The average annual CARE discount received per residential facility by energy source is $773.78.

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

Commercial Facility Electric Discount: $5,807.04

The average annual CARE discount received per commercial facility by energy source is $5,807.04.

3.4 Outreach

3.4.1 Discuss utility Outreach Activities and those undertaken by third parties on the utility's behalf.

Potentially eligible customers may become aware of the CARE Expansion program through SCE's Customer Contact Center. Events conducted by SCE's Local Public Affairs department promote Income Qualified Programs to community leaders across SCE's service territory. Organizations participating in the CARE Capitation Fee program may help an eligible customer complete a CARE application for the Expansion program.

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

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

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

3.4.1.2 Discuss how the CARE Facility Data and Relevant Program Information is shared by the utility with other utilities sharing service territory.

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

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

The barrier to participation for the CARE Expansion Program tends to emerge from a lack of knowledge about the availability of CARE to the nonprofit community. To help mitigate these issues, SCE's Customer Contact Center representatives are trained to prescreen and offer the program when speaking with potentially qualified group living facilities and homeless shelter owners.

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

In 2018, SCE explored additional ways to outreach to group living and homeless shelters with the use of third-party data. SCE plans to utilize this data to initiate direct mailing campaigns in 2019.

3.5 Program Management

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

In 2018, there were no significant issues and/or events that impacted program management in this reporting period.

4. Fund Shifting

4.1 Report ESA Program Fund Shifting Activity

No ESA fund shifting activity occurred within the rules laid out in Section 20.1 of D.08-11-031 as modified by D.10-10-008, D.16-11-022, and D.17-12-009.

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

- The CARE program did not fund shifting activity in 2018.
- CARE is a "Two-way" Balancing Account, any over or under spend in the CARE Balancing Account will be transferred to Public Purpose Adjustment Mechanism.
- The 2018 CARE program spent included $61,425, reported in the Regulatory Compliance category, for 2013-2015 CARE/ESA CPUC Audit invoice

4.1.2 Was there any Energy Savings Assistance Program or CARE Fund Shifting Activity that occurred that falls Outside the Rules laid out in Section 20.1 of D. 08-11-031 as Modified by D.1010-008, D.16-11-022, and D.17-12-009.

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

5. Commonly Used Acronyms

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

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

6. Appendix: ESA and CARE Program Tables

6.1 ESA Program Tables

Summary Table – ESA Program and CARE Program

ESA Program – Table 1- ESA Overall Program Expenses

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

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

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

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

ESA Program – Table 3 – Cost Effectiveness

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

ESA Program – Table 5 – Direct Purchases & Installation Contractors

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

ESA Program – Table 7 – Expenditures by Cost Elements

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

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

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

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

ESA Program – Table 12 – Fund Shifting

ESA Program – Table 13 – Categorical Enrollment

ESA Program – Table 14 – Leveraging & Integration

ESA Program – Table 15 – Lighting

ESA Program – Table 16 – "Add Back" Measures

ESA Program – Table 17 – Expenditures for Pilots and Studies

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

6.2 CARE Program Tables

CARE Program – Table 1 – CARE Overall Program Expenses

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

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

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

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

CARE Program – Table 5 – Enrollment by County

CARE Program – Table 6 – Re-certification Results

CARE Program – Table 7 – Capitation Contractors

CARE Program – Table 8 – Participants per Month

CARE Program – Table 9 – Average Monthly Usage & Bill

CARE Program – Table 10 – CARE Surcharge & Revenue

CARE Program – Table 11 – CARE Capitation Applications

CARE Program – Table 12 – CARE Expansion Program

CARE Program – Table 13 – CARE High Usage Verification Results

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

CARE Program – Table 14 – CARE Categorical Enrollment

Energy Savings Assistance Program
And
California Alternate Rates for Energy Program
Southern California Edison 2018 Summary Highlights

ESA Program

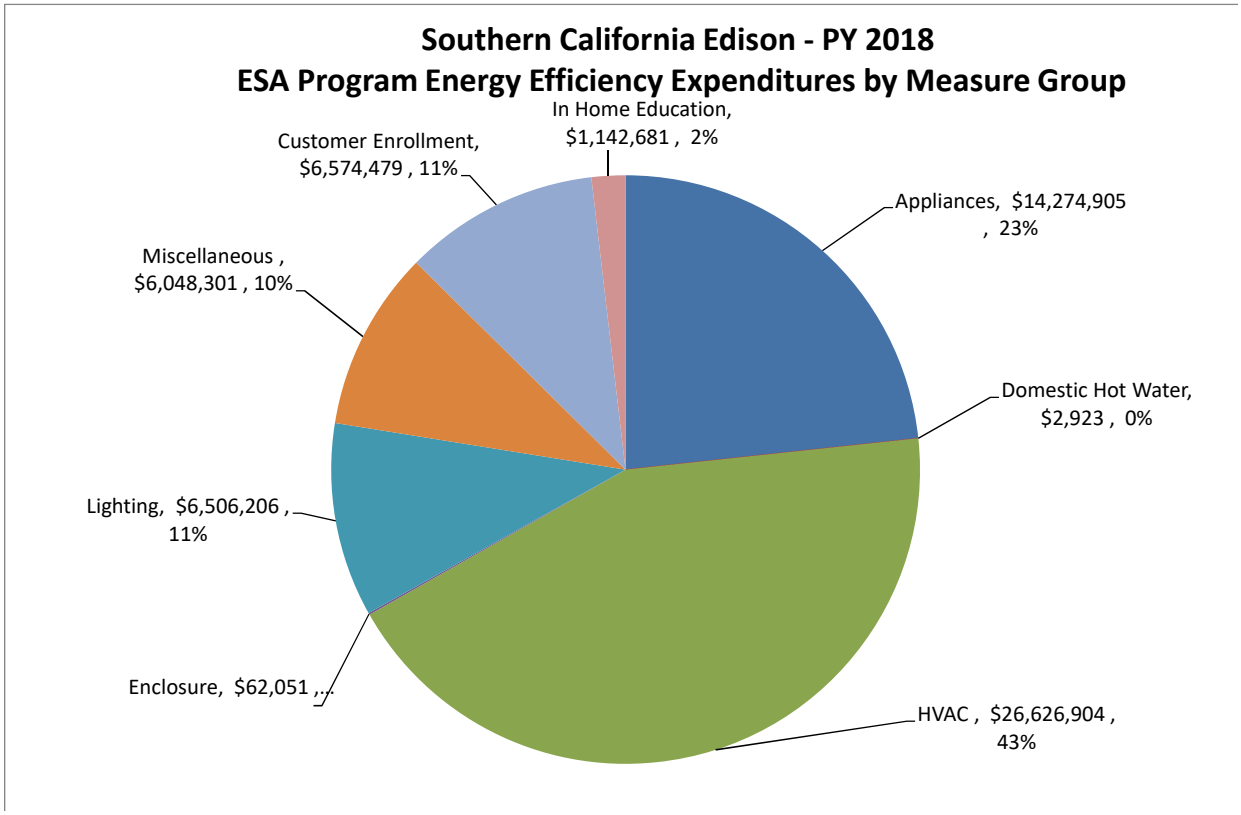
2018 Energy Savings Assistance Program Summary			
2018	**Authorized / Planning Assumptions**	**Actual**	**%**
Budget [1]	$61,919,683	$64,849,390	104.7%
Funded from 2009-2016 Unspent Funds	$17,186,772	$2,968,328	17%
Summary Homes Treated	93,597	86,307	92%
Summary kWh Saved	30,800,000	47,222,851	153%
Summary kW Demand Reduced	-	6,367	N/A
Summary Therms Saved	-	-	N/A
First Touches Homes Treated	76,584	67,249	88%
- kWh Saved	-	37,793,583	N/A
- kW Demand Reduced	-	5,155	N/A
- Therms Saved	-	-	N/A
Go-Backs/Retreated Homes	17,013	19,058	112%
- kWh Saved	-	9,429,268	N/A
- kW Demand Reduced	-	1,212	N/A
- Therms Saved	-	-	N/A

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

CARE Program

2018 CARE Program Summary			
2018	**Authorized Budget**	**Actual**	**%**
Administrative Expenses	$7,397,516	$ 7,435,063	101%
Subsidies	$482,397,449	$ 376,226,811	78%
Service Establishment Charge	$0	$0	0%
Total Program Costs and Discounts	**$489,794,965**	**$383,661,874**	78%
CARE New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc**	**Self Certified as Categorically Eligible**	**Self Certified as Income Eligible**
Method	61,926	156,667	92,012
CARE Penetration	**Estimated Eligible Participants**	**Participants**	**Penetration Rate**
Total Enrolled	1,422,225	1,205,539	85%

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



	A	B	C	D	E	F	G	H	I	J
1	**Southern California Edison - PY 2018 Energy Savings Assistance Program Annual Report** **ESAP Table 1** **ESAP Overall Program Expenses**									
2		**2018 Authorized Budget[1,2]**			**2018 Annual Expenses**			**% of Budget Spent**		
3	**ESA Program:**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
4	**Energy Efficiency**									
5	Appliances [3]	$ 20,600,293	$ -	$ 20,600,293	$ 14,274,905	$ -	$ 14,274,905	69%	.	69%
6	Domestic Hot Water	$ 29,612	$ -	$ 29,612	$ 2,923	$ -	$ 2,923	10%	0%	10%
7	Enclosure	$ 206,446	$ -	$ 206,446	$ 62,051	$ -	$ 62,051	30%	0%	30%
8	HVAC	$ 23,701,595	$ -	$ 23,701,595	$ 25,108,904	$ -	$ 25,108,904	106%	0%	106%
9	Maintenance	$ 96,417	$ -	$ 96,417	$ -	$ -	$ -	0%	0%	0%
10	Lighting	$ 1,929,586	$ -	$ 1,929,586	$ 6,506,206	$ -	$ 6,506,206	337%	0%	337%
11	Miscellaneous	$ 2,508,593	$ -	$ 2,508,593	$ 4,659,398	$ -	$ 4,659,398	186%	0%	186%
12	Customer Enrollment	$ 4,275,486	$ -	$ 4,275,486	$ 6,574,479	$ -	$ 6,574,479	154%	0%	154%
13	In Home Education	$ 1,388,162	$ -	$ 1,388,162	$ 1,142,681	$ -	$ 1,142,681	82%	0%	82%
14	Pilot	$ -	$ -	$ -		$ -	$ -	0%	0%	0%
15										
16	**Energy Efficiency TOTAL**	**$ 54,736,190**	**$ -**	**$ 54,736,190**	**$ 58,331,548**	**$ -**	**$ 58,331,548**	**107%**	**0%**	**107%**
17										
18	Training Center	$ 516,064	$ -	$ 516,064	$ 194,534	$ -	$ 194,534	0%	0%	0%
19	Inspections	$ 1,100,363	$ -	$ 1,100,363	$ 1,118,116	$ -	$ 1,118,116	102%	0%	102%
20	Marketing and Outreach	$ 950,000	$ -	$ 950,000	$ 908,803	$ -	$ 908,803	96%	0%	96%
21	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
22	Measurement and Evaluation Studies	$ 91,250	$ -	$ 91,250	$ 150,274	$ -	$ 150,274	165%	0%	165%
23	Regulatory Compliance	$ 464,382	$ -	$ 464,382	$ 440,011	$ -	$ 440,011	95%	0%	95%
24	General Administration	$ 4,001,434	$ -	$ 4,001,434	$ 3,674,470	$ -	$ 3,674,470	92%	0%	92%
25	CPUC Energy Division	$ 60,000	$ -	$ 60,000	$ 31,635	$ -	$ 31,635	53%	0%	53%
26										
27	**TOTAL PROGRAM COSTS**	**$ 61,919,683**	**$ -**	**$ 61,919,683**	**$ 64,849,390**	**$ -**	**$ 64,849,390**	**105%**	**0%**	**105%**
28	**Funded Outside of ESA Program Budget**									
29	Indirect Costs				$ 1,109,432	$ -	$ 1,109,432			
30	NGAT Costs				$ -	$ -	$ -			
31										
32	[2] Reflects the funding authorized in D.16-11-022 per year and updated in Commission Resolution E-4885 dated December 14, 2017 which addressed SCE Conforming Advice Letter E-3585-E-A filed on June 20, 2017.									

Southern California Edision - PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 1A
Expenses Funded from 2009-2016 Unspent Program Funds

	2018 Authorized Budget[1,2]			2018 Annual Expenses			% of Budget Spent		
ESA Program:	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	Electric	Gas	Total
Energy Efficiency									
- Central AC and other AC related measures- Wx 13	$ 6,348,570	$ -	$ 6,348,570	$ 1,518,000	$ -	$ 1,518,000	24%	0%	24%
- Power Strip Tier II	$ 2,177,352	$ -	$ 2,177,352	$ 1,388,903	$ -	$ 1,388,903	64%	0%	64%
- HE Clothes Washer	$ 3,160,850	$ -	$ 3,160,850		$ -	$ -	0%	0%	0%
Multi-Family Common Area Measures	$ 4,500,000	$ -	$ 4,500,000	$ -	$ -	$ -	0%	0%	0%
In Home Education	$ -	$ -	$ -		$ -	$ -	0%	0%	0%
Leveraging - CSD	$ 1,000,000	$ -	$ 1,000,000		$ -	$ -	0%	0%	0%
Measurement and Evaluation Studies	$ -	$ -	$ -		$ -	$ -	0%	0%	0%
Regulatory Compliance [3]	$ -	$ -	$ -	$ 61,425	$ -	$ 61,425	0%	0%	0%
General Administration	$ -	$ -	$ -		$ -	$ -	0%	0%	0%
TOTAL PROGRAM COSTS[1]	**$ 17,186,772**	**$ -**	**$ 17,186,772**	**$ 2,968,328**	**$ -**	**$ 2,968,328**	17%	0%	17%

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

[2] Reflects the funding authorized in D.16-11-022 per year and updated in Commission Resolution E-4885 dated December 14, 2017 which addressed SCE Conforming Advice Letter E-3585-E-A filed on June 20, 2017.
[3] 2013-2015 CARE/ESA CPUC Audit invoice recorded in 2018

		ESA Program (Summary)Total					
		Year-To-Date Completed & Expensed Installation					
Measures	**Units**	**Quantity Installed**	**kWh [4] (Annual)**	**kW [4] (Annual)**	**Therms [4] (Annual)**	**Expenses ($)**	**% of Expenditure**
Appliances		(K+S)	(L+T)	(M+U)	(N+V)	(O+W)	
High Efficiency Clothes Washer	Each	-	-	-	-	$ -	0.0%
Refrigerators	Each	12,676	9,807,329	1,178	-	$ 12,866,831	21.5%
Microwaves [5]	Each	-	-	-	-	$ -	0.0%
Domestic Hot Water							
Water Heater Blanket	Home	2	175	0	-	$ 97	0.0%
Low Flow Shower Head	Home	234	25,009	3	-	$ 8,137	0.0%
Water Heater Pipe Insulation	Home	43	3,665	0	-	$ 849	0.0%
Faucet Aerator	Home	171	28,102	3	-	$ 1,922	0.0%
Water Heater Repair/Replacement	Each	-	-	-	-	$ -	0.0%
Thermostatic Shower Valve	Each	-	-	-	-	$ -	0.0%
New - Combined Showerhead/(TSV)	Each	-	-	-	-	$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%
New - Tub Diverter/ Tub Spout	Each	-	-	-	-	$ -	0.0%
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%
Enclosure							
Air Sealing / Envelope [1]	Home	482	38,359	12	-	$ 50,771	0.1%
Attic Insulation	Home	2	-	-	-	$ 2,480	0.0%
HVAC							
FAU Standing Pilot Conversion	Each	-	-	-	-	$ -	0.0%
Furnace Repair/Replacement	Each	-	-	-	-	$ -	0.0%
Room A/C Replacement	Each	960	60,684	9	-	$ 790,164	1.3%
Central A/C replacement	Each	3,335	526,659	95	-	$ 13,218,384	22.1%
Heat Pump Replacement	Each	181	125,752	57	-	$ 712,158	1.2%
Evaporative Cooler (Installation)	Each	10,849	4,820,492	744	-	$ 11,159,978	18.7%
Duct Testing and Sealing	Home	3,200	83,487	14	-	$ 746,220	1.2%
New - Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%
New - Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%
New - A/C Time Delay	Home	-	-	-	-	$ -	0.0%
Maintenance							
Furnace Clean and Tune	Home	-	-	-	-	$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	$ -	0.0%
Lighting							
Compact Fluorescent Lights (CFL)	Each	3,891	64,373	8	-	$ 28,093	0.0%
Interior Hard wired CFL fixtures	Each	-	-	-	-	$ -	0.0%
Exterior Hard wired CFL fixtures	Each	88	3,080	0	-	$ 7,935	0.0%
Torchiere	Each	13	1,174	0	-	$ 886	0.0%
Torchiere - LED	Each	14,225	553,822	60	-	$ 911,665	1.5%
Occupancy Sensor	Each	-	-	-	-	$ -	0.0%
LED Exterior Fixture	Each	891	75,735	8	-	$ 80,118	0.1%
New - LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	$ -	0.0%
New - LED Reflector Bulb	Each	5,400	92,765	10	-	$ 45,454	0.1%
New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	$ -	0.0%
New - LED A-Lamps	Each	588,763	23,016,466	2,514	-	$ 5,432,055	9.1%
Miscellaneous							
Pool Pumps	Each	1,834	3,196,525	1,005	-	$ 2,201,262	3.7%
Smart Power Strips - Tier 1	Each	61,710	1,499,116	204	-	$ 2,458,135	4.1%
New - Smart Power Strips - Tier 2	Each	24,630	3,200,080	443	-	$ 1,388,903	2.3%
Pilots							
Customer Enrollment							
Outreach & Assessment	Home	92,041				$ 6,583,985	11.0%
In-Home Education	Home	75,971				$ 1,140,335	1.9%
Total Savings/Expenditures		901,592	47,222,851	6,367	-	$ 59,836,817	
Total Households Weatherized [2]		482					

Households Treated	Total (K+S)	
- Single Family Households Treated	Home	61,620
- Multi-family Households Treated	Home	17,185
- Mobile Homes Treated	Home	7,502
Total Number of Households Treated	Home	86,307
# Eligible Households to be Treated for PY [3]	Home	93,597
% of Households Treated	%	92%
- Master-Meter Households Treated	Home	12,619

	A	B	C	D	E	F	G	H	I	J
1	**Southern California Edison - PY 2018 Energy Savings Assistance Program Annual Report**									
2	**ESAP Table 2A**									
3	**ESAP Expenses and Energy Savings by Measures Installed**									
4										
5			**ESA Program - CSD Leveraging**							
6			**Year-To-Date Completed & Expensed Installation**							
7	**Measures**	**Units**	**Quantity Installed**	**kWh [4] (Annual)**	**kW [4] (Annual)**	**Therms [4] (Annual)**	**Expenses ($)**	**% of Expenditure**		
8	**Appliances**									
9	High Efficiency Clothes Washer	Each								
10	Refrigerators	Each								
11	Microwaves [5]	Each								
12	**Domestic Hot Water**									
13	Water Heater Blanket	Home								
14	Low Flow Shower Head	Home								
15	Water Heater Pipe Insulation	Home								
16	Faucet Aerator	Home								
17	Water Heater Repair/Replacement	Each								
18	Thermostatic Shower Valve	Each								
19	New - Combined Showerhead/TSV	Each								
20	New - Heat Pump Water Heater	Each								
21	New - Tub Diverter/ Tub Spout	Each								
22	New - Thermostat-controlled Shower Valve	Each								
23	**Enclosure**									
24	Air Sealing / Envelope [1]	Home								
25	Caulking	Home								
26	Attic Insulation	Home								
27	**HVAC**									
28	FAU Standing Pilot Conversion	Each								
29	Furnace Repair/Replacement	Each								
30	Room A/C Replacement	Each								
31	Central A/C replacement	Each								
32	Heat Pump Replacement	Each								
33	Evaporative Cooler (Replacement)	Each								
34	Evaporative Cooler (Installation)	Each								
35	Duct Testing and Sealing	Home								
36	New - Energy Efficient Fan Control	Home								
37	New - Prescriptive Duct Sealing	Home								
38	New - High Efficiency Forced Air Unit (HE FAU)	Home								
39	New - A/C Time Delay	Home								
40	**Maintenance**									
41	Furnace Clean and Tune	Home								
42	Central A/C Tune up	Home								
43	**Lighting**									
44	Compact Fluorescent Lights (CFL)	Each								
45	Interior Hard wired CFL fixtures	Each								
46	Exterior Hard wired CFL fixtures	Each								
47	Torchiere	Each								
48	Occupancy Sensor	Each								
49	LED Night Lights	Each								
50	New - LED Diffuse Bulb (60W Replacement)	Each								
51	New - LED Reflector Bulb	Each								
52	New - LED Reflector Downlight Retrofit Kits	Each								
53	New - LED A-Lamps	Each								
54	**Miscellaneous**									
55	Pool Pumps	Each								
56	Smart Power Strips - Tier 1	Each								
57	New - Smart Power Strips - Tier 2	Each								
58	**Pilots**									
59										
60	**Customer Enrollment**									
61	Outreach & Assessment	Home					$ -			
62	In-Home Education	Home					$ -			
63										
64	**Total Savings/Expenditures**			-	-	-	$ -			
65										
66	Total Households Weatherized [2]									
67										
68	**Households Treated**		**CSD MF Buildings Treated**			**Total**				
69	- Single Family Households Treated	Home								
70	- Multi-family Households Treated	Home	- Multifamily							
71	- Mobile Homes Treated	Home								
72	**Total Number of Households Treated**	Home								
73	**# Eligible Households to be Treated for PY [3]**	Home								
74	**% of Households Treated**	%								
75	- Master-Meter Households Treated	Home								
76	[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access									
77	minor home repairs. Minor home repairs predominantly are door jamb									
78	[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.									
79	[3] Based on OP 79 of D.16-11-022.									
80	[4] All savings are calculated based on the following sources:									
81	Evergreen Economics "Impact Evaluation of the 2011 CA Low Inco									
82	December of 2011.									
83	**Results for this table were not provided as SCE has not yet begun CSD leveraging efforts for the ESA Program.**									

Southern California Edison - PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 2B
ESAP Expenses and Energy Savings by Measures Installed

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

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

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.
[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.
[3] Based on OP 79 of D.16-11-022.
[4] All savings are calculated based on the following sources:
[5] Microwave savings are from ECONorthWest Studies received in December of 2011

Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013
[6] Per D.16-11-022 at p.210, the CPUC imposes a cap of 10% of ESA Program funds for administrative activities and a ceiling of
[7] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.

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

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

Southern California Edison - PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 3
Program Cost Effectiveness

	Ratio of Benefits Over Costs			Net Benefits $ (million)	
	ProgramYear	**ESACET**	**ResourceTRC**	**ESACET**	**ResourceTRC**
	2018	1.02	1.12	$ 1.16	$ 4.60

Notes:

- All program measures "resource and non-resource measures" are included in the ESACET. Only measures considered "resource measures" are included in the Resource TRC.
- The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs.
- The Resource TRC includes energy benefits and program measure and installation costs.
- Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.
- Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC.

Southern California Edison - PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 4
Detail by Housing Type and Source[1]

		2017 Energy Savings[5]				
Customer	Housing Type	# Homes Treated	(mWh)	MW	(mTherm)	2018 Expenses
Gas and Electric Customers						
Owners - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Renters - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Electric Customers (only)						
Owners - Total		**48,235**	**28,317**	**4.07**	-	**$ 43,651,991**
	Single Family	40,937	24,267	3.53		$ 37,644,470
	Multi Family	765	444	0.08		$ 819,564
	Mobile Homes	6,533	3,606	0.46		$ 5,187,958
Renters - Total		**38,072**	**18,906**	**2.30**	-	**$ 22,764,093**
	Single Family	20,683	11,224	1.41		$ 14,349,360
	Multi Family	16,420	7,099	0.82		$ 7,622,689
	Mobile Homes	969	583	0.07		$ 792,043
Gas Customers (only)						
Owners - Total						
	Single Family					
	Multi Family					
	Mobile Homes					
Renters - Total						
	Single Family					
	Multi Family					
	Mobile Homes					
Gas and Electric Total						
Multifamly Common Area Bldgs - Total						
Totals:		**86,307**	**47,223**	**6.37**	-	**$ 66,416,084**

Penetration History

Year	Homes Treated[2]	Ineligible & Unwilling[3]	Estimated Eligible in Current Year[4]	Current Year Penetration Rate for Homes Treated
2002	29,685			
2003	33,348			
2004	38,996			
2005	36,420			
2006	53,017			
2007	44,323			
2008	54,635			
2009	61,834	22,109	83,445	74%
2010	121,016	41,110	83,445	145%
2011	93,771	25,067	83,446	112%
2012	49,026	19,833	87,389	56%
2013	69,031	37,449	87,389	79%
2014	76,983	40,596	87,389	88%
2015	54,127	57,193	87,389	62%
2016	41,070	57,303	87,389	47%
2017	64,520	50,166	80,531	80%
2018	67,249	56,651	76,584	87%
2019				
2020				
Total Homes Treated since 2002	989,051	407,477	844,396	

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

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

[3] Ineligible & Unwilling defined in ESA Table 8.

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

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2018	PG&E	5,760	8
2018	SDG&E	0	0
2018	SoCalGas	1,228,572	30,240

Southern California Edison - PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 5
ESAP Direct Purchases & Installation Contractors [1]

	Contractor	Contractor	County	Contractor Type (Check one or more if applicable) Private	CBO	WMDVBE	LIHEAP	2018 Annual Expenditures
4	American Electric Supply, Inc. [2]	- Contractor 1	All	x				$ 1,878,188
5	American Insulation, Inc.	- Contractor 2	14	x		x		$ 199,919
6	Assert, Inc.	- Contractor 3	4		x			$ 538,815
7	Autocell Electronics, Inc. [2]	- Contractor 4	All	x		x		$ 3,121,501
8	Community Action Partnership of San Bernardino County	- Contractor 5	9,11		x	x	x	
9	Community Action of Ventura County	- Contractor 6	8		x		x	$ 144,909
10	Energy Efficiency Resources, Inc. [2]	- Contractor 7	All	x		x		$ 16,954,972
11	Energy Save [3]	- Contractor 8	4,6,7,8,11	x		x		$ 2,150,630
12	Environmental Assessment Services& Education of California	- Contractor 9	6,7,11	x		x		$ 605,065
13	FCI Management Consultants	- Contractor 10	4	x		x		$ 62,741
14	Ferguson Enterprises [2]	- Contractor 11	All	x				$ 3,432,159
15	Gary's Pool Supplies [2]	- Contractor 12	All	x				$ 1,556,857
16	Home Energy Assistance Living, Inc.	- Contractor 13	4, 6	x		x		$ 795,054
17	Inter City Energy Systems, Inc.	- Contractor 14	14	x		x		$ 2,050,841
18	John Harrison Contracting, Inc.	- Contractor 15	7,8	x		x		$ 6,101,394
19	Long Beach Community Services Development Corp.	- Contractor 16	4		x	x	x	$ 92,655
20	Maravilla Foundation	- Contractor 17	2,4,6,10,11		x	x	x	$ 3,600,679
21	Pacific Asian Consortium in Employment	- Contractor 18	4,9,11		x	x	x	$ 60,125
22	Peace Officers for Green Environment	- Contractor 19	6,7,8	x		x		$ 2,961,930
23	Proteus, Inc.	- Contractor 20	1,2,3,4,5,8,9,10,11		x			$ 2,385,427
24	Quality Conservation Services, Inc.	- Contractor 21	4,8	x				$ 400,102
25	Reliable Energy Management, Inc.	- Contractor 22	4,8	x		x		$ 2,173,410
26	Richard Heath and Associates, Inc. [3]	- Contractor 23	All	x		x		$ 350,324
27	Saving Energy Consulting Services, Inc.	- Contractor 24	6,7	x		x		$ 375,334
28	Silicon Valley Foundation	- Contractor 25	14	x		x		$ 416,198
29	Synergy Companies	- Contractor 26	14	x				$ 629,600
30	Tri-State Home Improvements, Inc.	- Contractor 27	4,7,8	x		x		$ 6,579,839
31	Veterans in Community Services, Inc.	- Contractor 28	14		x	x		$ 187,720
32	Village Solutions Foundation	- Contractor 29	4,6		x			$ 97,530
33	**Total Contractor Expenditures**							**$ 59,903,917**

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

1 Inyo
2 Kern
3 Kings
4 Los Angeles
5 Mono
6 Orange
7 Riverside
8 San Bernardino
9 Santa Barbara
10 Tulare
11 Ventura
12 Fresno
13 Service clients from within the organization
14 Service SCG customers only

[2] Appliance Supplier
[3] Inspections

Southern California Edison - PY 2018 Energy Savings Assistance Program
Annual Report
ESAP Table 6
ESAP Installation Cost of Program Installation Contractors [1]

		CBO/WMDVBE						Non-CBO/WMDVBE						2018 Program Total				
	Unit of Measure	Installations		Dwellings		Costs		Installations		Dwellings		Costs						
		Units	%	Units	%	$	%	Units	%	Units	%	$	%	Units Installed	Households	Costs	Cost/ Unit	Cost/ Household
Dwellings	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Appliances																		
High Efficiency Clothes Washer	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Refrigerators	Each	12,676	100%	12,676	100%	$ 12,866,831	100%	-	0%	-	0%	$ -	0%	12,676	12,676	$ 12,866,831	$1,015.05	$1,015.05
Microwaves	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Domestic Hot Water																		
Water Heater Blanket	Home	-	0%	2	100%	$ 97	100%	-	0%		0%	$ -	0%	-	2	$ 97	$ -	$ 48.63
Low Flow Shower Head	Home	-	0%	234	100%	$ 8,137	100%	-	0%	-	0%	$ -	0%	-	234	$ 8,137	$ -	$ 34.77
Water Heater Pipe Insulation	Home	-	0%	43	100%	$ 849	100%	-	0%		0%	$ -	0%	-	43	$ 849	$ -	$ 19.75
Faucet Aerator	Home	-	0%	171	100%	$ 1,922	100%	-	0%	-	0%	$ -	0%	-	171	$ 1,922	$ -	$ 11.24
Water Heater Repair/Replacement	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Thermostatic Shower Valve	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Combined Showerhead/(TSV)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Heat Pump Water Heater	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Tub Diverter/ Tub Spout	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Thermostat-controlled Shower Valve	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Enclosure																		
Air Sealing / Envelope	Home	-	0%	482	100%	$ 50,771	100%	-	0%	-	0%	$ -	0%	-	482	$ 50,771	$ -	$ 105.33
Attic Insulation	Home		0%	2	100%	$ 2,480	100%	-	0%	-	0%	$ -	0%	-	2	$ 2,480	$ -	$1,239.84
HVAC																		
FAU Standing Pilot Light Conversion	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Furnace Repair/Replacement	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Room A/C Replacement	Each	960	100%	723	100%	$ 790,164	100%	-	0%	-	0%	$ -	0%	960	723	$ 790,164	$ 823.09	$1,092.90
Central A/C Replacement	Each	3,335	100%	3,335	100%	$ 13,218,384	100%	-	0%	-	0%	$ -	0%	3,335	3,335	$ 13,218,384	$3,963.53	$3,963.53
Heat Pump Replacement	Each	181	100%	181	100%	$ 712,158	100%	-	0%	-	0%	$ -	0%	181	181	$ 712,158	$3,934.57	$3,934.57
Evaporative Coolers (Installation)	Each	10,849	100%	10,849	100%	$ 11,159,978	100%	-	0%	-	0%	$ -	0%	10,849	10,849	$ 11,159,978	$1,028.66	$1,028.66
Duct Testing and Sealing	Home	-	0%	3,200	100%	$ 746,220	100%	-	0%	-	0%	$ -	0%	-	3,200	$ 746,220	$ -	$ 233.19
New - Energy Efficient Fan Control	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Prescriptive Duct Sealing	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - A/C Time Delay	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Maintenance																		
Furnace Clean and Tune	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Central A/C Tune-up	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Evaporative Cooler Maintenance	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Lighting																		
Compact Fluorescent Lights (CFLs)	Each	3,861	99%	1,095	100%	$ 27,852	99%	30	1%	4	0%	$ 241	1%	3,891	1,099	$ 28,093	$ 7.22	$ 25.56
Interior Hard wired CFL fixtures	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Exterior Hard wired CFL fixtures	Each	88	100%	43	100%	$ 7,935	100%	-	0%	-	0%	$ -	0%	88	43	$ 7,935	$ 90.17	$ 184.53
Torchiere	Each	11	85%	9	90%	$ 763	86%	2	15%	1	10%	$ 123	14%	13	10	$ 886	$ 68.14	$ 88.58
Torchiere - LED	Each	12,829	90%	9,931	91%	$ 822,531	90%	1,396	10%	924	9%	$ 89,134	10%	14,225	10,855	$ 911,665	$ 64.09	$ 83.99
Occupancy Sensor	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
LED Exterior Fixture	Each	891	100%	466	100%	$ 80,118	100%	-	0%	-	0%	$ -	0%	891	466	$ 80,118	$ 89.92	$ 171.93
New - LED Diffuse Bulb (60W Replacement)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - LED Reflector Bulb	Each	4,293	80%	643	79%	$ 36,248	80%	1,107	21%	170	21%	$ 9,206	20%	5,400	813	$ 45,454	$ 8.42	$ 55.91
New - LED Reflector Downlight Retrofit Kits	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - LED A-Lamps	Each	524,096	89%	65,916	91%	$ 4,862,444	90%	64,667	11%	6,133	9%	$ 569,611	10%	588,763	72,049	$ 5,432,055	$ 9.23	$ 75.39
Miscellaneous																		
Pool Pumps	Each	1,834	100%	1,834	100%	$ 2,201,262	100%	-	0%	-	0%	$ -	0%	1,834	1,834	$ 2,201,262	$1,200.25	$1,200.25
Smart Power Strips	Each	56,707	92%	34,455	93%	$ 2,259,153	92%	5,003	8%	2,590	7%	$ 198,982	8%	61,710	37,045	$ 2,458,135	$ 39.83	$ 66.36
New - Smart Power Strips - Tier 2	Each	22,856	93%	14,889	94%	$ 1,289,454	93%	1,774	7%	988	6%	$ 99,449	7%	24,630	15,877	$ 1,388,903	$ 56.39	$ 87.48
Ancillary Services																		
Commissioning	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
Audit	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
Administration	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
Pilots																		
	Each		0%						0%					-	-	$ -	$ -	$ -
	Each		0%						0%					-	-	$ -	$ -	$ -
Customer Enrollment																		
Outreach & Assessment	Home	-	0%	83,086	90%	$ 6,063,109	92%	-	0%	8,955	10%	$ 520,876	8%	-	92,041	$ 6,583,985	$ -	$ 71.53
In-Home Education	Home	-	0%	68,881	91%	$ 1,033,985	91%	-	0%	7,090	9%	$ 106,350	9%	-	75,971	$ 1,140,335	$ -	$ 15.01

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

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

	A	B	C	D	E
1	**Southern California Edison Company - PY 2018 Energy Savings Assistance Program Annual Report ESAP Table 7 Expenditures Recorded by Cost Element [1]**				
2	**ESA Program:**	**Labor**	**Non-Labor**	**Contractor**	**Total**
3	Energy Efficiency				
4	Appliances	$ -	$ -	$ 14,274,905	$ 14,274,905
5	Domestic Hot Water	$ -	$ -	$ 2,923	$ 2,923
6	Enclosure	$ -	$ -	$ 62,051	$ 62,051
7	HVAC	$ -	$ -	$ 26,626,904	$ 26,626,904
8	Maintenance	$ -	$ -	$ -	$ -
9	Lighting	$ -	$ -	$ 6,506,206	$ 6,506,206
10	Miscellaneous	$ -	$ -	$ 6,048,301	$ 6,048,301
11	Customer Enrollment	$ -	$ -	$ 6,574,479	$ 6,574,479
12	In Home Education	$ -	$ -	$ 1,142,681	$ 1,142,681
13	Pilot	$ -	$ -	$ -	$ -
14	**Energy Efficiency TOTAL**	**$ -**	**$ -**	**$ 61,238,451**	**$ 61,238,451**
15					
16	Training Center	$ 96,678	$ 28,273	$ 69,584	$ 194,534
17	Inspections	$ 53,140	$ 11,749	$ 1,053,227	$ 1,118,116
18	Marketing and Outreach	$ -	$ 279,443	$ 629,361	$ 908,803
19	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -
20	Measurement and Evaluation Studies	$ -	$ 1,281	$ 148,993	$ 150,274
21	Regulatory Compliance	$ 426,451	$ 74,985		$ 501,436
22	General Administration	$ 1,708,865	$ 593,226	$ 1,372,379	$ 3,674,470
23	CPUC Energy Division	$ -	$ 31,635	$ -	$ 31,635
24					
25	**TOTAL PROGRAM COSTS**	**$ 2,285,133**	**$ 1,020,591**	**$ 64,511,994**	**$ 67,817,718**
26					
27					
28	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.				

Southern California Edison Company - PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 8
ESAP Homes Unwilling / Unable to Participate

	Reason Provided							
County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
Inyo	1	1	0	1	2	6	30
Kern	7	12	0	47	10	118	416
Kings	9	22	0	22	5	16	183
Los Angeles	114	152	2	2,206	284	3,547	12,957
Mono	0	0	0	0	1	2	3
Orange	36	60	0	356	92	979	7,889
Riverside	124	183	0	2,262	155	1,261	5,788
San Bernardino	219	252	1	1,561	175	1,947	8,420
Santa Barbara	3	3	2	2	5	10	280
Tulare	67	82	1	167	17	179	1,207
Ventura	20	38	3	143	44	314	2,128
Total	**600**	**805**	**9**	**6,767**	**790**	**8,379**	**39,301**

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

ESAP Coordinated Treatment (SCE and SCG only)

	Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency [1]				
# of Households Received Measures from one Utility, but not other Utility or Partnering Agency[1]	**# of Customer Unwilling/Declined Program Measures**	**# of Customer Unavailable - Scheduling Conflicts**	**# of Hazardous Environment (unsafe/unclean)**	**# of Landlord Refused to Authorize Participation**	**# of Other Infeasible/ Ineligible[2]**
9,993	364	75	1	601	8,952
Total	**364**	**75**	**1**	**601**	**8,952**

[1] Excludes households for which a joint premise could not be found due to address normalization limitations between SCE and SCG.
[2] Includes households for which a joint premise was found, but either 1) no SCE lead exists, 2) a lead exists but a reason preventing enrollment could not be found, 3) a lead exists and was enrolled, but no measures were provided.

	A	B	C	D	E	F	G
1	**Southern California Edison - PY 2018 Energy Savings Assistance Program Annual Report ESAP Table 9 Life Cycle Bill Savings by Measure [1][3]**						
2	**Measure Description**		**2017 Number Installed**	**Per Measure Electric Impact (kWh)**	**Per Measure Gas Impact (Therms)**	**Effective Useful Life (EUL)**	**2018 Total Measure Life Cycle Bill Savings**
3	**Appliances**						
4	High Efficiency Clothes Washer	Each	-	-			$ -
5	Refrigerators	Each	12,676	773.69		14	$ 13,865,768
6	Microwaves [2]	Each	-				$ -
7	**Domestic Hot Water**						
8	Water Heater Blanket	Home	2	87.50		7	$ 145
9	Low Flow Shower Head	Home	234	106.88		10	$ 27,583
10	Water Heater Pipe Insulation	Home	43	85.24		11	$ 4,349
11	Faucet Aerator	Home	171	164.34		10	$ 30,993
12	Water Heater Repair/Replacement	Each	-				$ -
13	Thermostatic Shower Valve	Each	-				$ -
14	New - Combined Showerhead/TSV	Each	-				$ -
15	New - Heat Pump Water Heater	Each	-				$ -
16	New - Tub Diverter/ Tub Spout	Each	-				$ -
17	New - Thermostat-controlled Shower Valve	Each	-				$ -
18	**Enclosure**						
19	Air Sealing / Envelope	Home	482	79.58		11	$ 45,509
20	Attic Insulation	Home	2	-			$ -
21	**HVAC**						
22	FAU Standing Pilot Light Conversion	Each	-				$ -
23	Furnace Repair/Replacement	Each	-	-			$ -
24	Room A/C Replacement	Each	960	63.21		9	$ 61,606
25	Central A/C Replacement	Each	3,335	157.92		15	$ 780,783
26	Heat Pump Replacement	Each	181	694.76		15	$ 186,430
27	Evaporative Coolers (Installation)	Each	10,849	444.33		15	$ 7,146,477
28	Duct Testing and Sealing	Home	3,200	26.09		18	$ 139,392
29	New - Energy Efficient Fan Control	Home	-				$ -
30	New - Prescriptive Duct Sealing	Home	-				$ -
31	New - High Efficiency Forced Air Unit (HE FAU)	Home	-				$ -
32	New - A/C Time Delay	Home	-				$ -
33	**Maintenance**						
34	Furnace Clean and Tune	Home	-				$ -
35	Central A/C Tune-up	Home	-	-		5	$ -
36	**Lighting**						
37	Compact Fluorescent Lights (CFLs)	Each	3,891	16.54		9.4	$ 65,419
38	Interior Hard wired CFL fixtures	Each	-				$ -
39	Exterior Hard wired CFL fixtures	Each	88	35.00		16	$ 4,768
40	Torchiere	Each	13	90.34		16	$ 1,818
41	Torchiere - LED	Each	14,225	38.93		16	$ 809,854
42	Occupancy Sensor	Each	-				$ -
43	LED Night Lights	Each	891	85.00		16	$ 117,234
44	New - LED Diffuse Bulb (60W Replacement)	Each	-				$ -
45	New - LED Reflector Bulb	Each	5,400	17.18		16	$ 124,309
46	New - LED Reflector Downlight Retrofit Kits	Each	-				$ -
47	New - LED A-Lamps	Each	588,763	39.09		16	$ 33,502,454
48	**Miscellaneous**						
49	Pool Pumps	Each	1,834	1,742.93		10	$ 3,525,418
50	Smart Power Strips	Each	61,710	24.29		5	$ 927,018
51	New - Smart Power Strips - Tier 2	Each	24,630	129.93		5	$ 1,857,949
52	**Ancillary Services**						
53	Commissioning	Home					$ -
54	Audit	Home					$ -
55	Administration	Home					$ -
56	**Pilots**						
57							$ -
58							
59	**Total**						$ 63,225,275
60							
61	**Total Homes Served By the Program**	86,307					
62	**Life Cycle Bill Savings Per Home**	$ 63,225,275					
63							
64							
65	[1] Summary data which includes ESA Program, CSD Leveraging, and MF commona area efforts.						
66	[2] For microwaves, the savings estimate comes from a separate analysis completed by Evergreen Economics. A reasonable estimate for the usage of the microwave, which would be shown as negative kWh, is not available at this time; however, we expect this to be addressed in the next impact evaluation.						
67	[3] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.						
68							

	A	B	C	D
1	**Southern California Edison - PY 2018 Energy Savings Assistance Program Annual Report ESAP Table 10 Energy Rate Used for Bill Savings Calculations [1][2]**			
2	Year	$/kWh	$/Therm	
3	2018	0.14	0.00	
4	2019	0.14	0.00	
5	2020	0.14	0.00	
6	2021	0.15	0.00	
7	2022	0.15	0.00	
8	2023	0.16	0.00	
9	2024	0.16	0.00	
10	2025	0.17	0.00	
11	2026	0.17	0.00	
12	2027	0.18	0.00	
13	2028	0.18	0.00	
14	2029	0.19	0.00	
15	2030	0.19	0.00	
16	2031	0.20	0.00	
17	2032	0.21	0.00	
18	2033	0.21	0.00	
19	2034	0.22	0.00	
20	2035	0.22	0.00	
21	2036	0.23	0.00	
22	2037	0.24	0.00	
23	2038	0.25	0.00	
24	2039	0.25	0.00	
25	2040	0.26	0.00	
26	2041	0.27	0.00	
27	2042	0.28	0.00	
28				
29	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.			
30	[2] For 2017, the average cost per kWh and therm paid by ESA participants is shown. Cost is escalated 3% annually for remaining years.			
31				
32				

	A	B	C	D	E
1	**Southern California Edison- PY 2018 Energy Savings Assistance Program Annual Report ESAP Table 11 Bill Savings Calculations by Program Year [1]**				
2	**Program Year**	**Program Costs**	**Program Lifecycle Bill Savings**	**Program Bill Savings/ Cost Ratio**	**Per Home Average Lifecycle Bill Savings**
3	2012	$ 39,378,995	$ 24,591,923	0.62	$ 502
4	2013	$ 55,604,816	$ 40,191,998	0.72	$ 582
5	2014	$ 55,886,233	$ 39,869,484	0.71	$ 518
6	2015	$ 51,068,549	$ 36,544,121	0.72	$ 675
7	2016	$ 56,095,969	$ 33,470,336	0.60	$ 815
8	2017	$ 61,120,956	$ 41,459,029	0.68	$ 516
9	2018	$ 67,817,718	$ 63,225,275	0.93	$ 733

Southern California Edison - PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 12
Fund Shifting[1]

		Budget[1]			Expenditures			(Shift) or Carried Forward (Budget - Expenditures = Variance)			FUND SHIFT AMOUNT: Among Categories within Program Year 1-3			FUND SHIFT AMOUNT: Carry Forward from 2017			FUND SHIFT AMOUNT: Carry Back from 2019								
Date	Program Year 2018	Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures[7]	Variance			(1) Shift of Current Year Authorized			(2) Shift of Carry Forward			(3) Shift of Carry Back			Total Shifted Gas/ Electric[4]	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization
								Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total						
	ESA Program:	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	*($x,xxx)*	*x%*				*G-xxxx, D.xx- xx-xxx*
	Energy Efficiency																								
	Appliance	$ 20,600,293	$ -	**$ 20,600,293**	$ 14,274,905	$ -	**$ 14,274,905**	$ 6,325,388	$ -	**$ 6,325,388**	$ (6,325,388)		**$ (6,325,388)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (6,325,388)	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Domestic Hot Water	$ 29,612	$ -	**$ 29,612**	$ 2,923	$ -	**$ 2,923**	$ 26,689	$ -	**$ 26,689**	$ (26,689)		**$ (26,689)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (26,689)	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Enclosure	$ 206,446	$ -	**$ 206,446**	$ 62,051	$ -	**$ 62,051**	$ 144,395	$ -	**$ 144,395**	$ (144,395)		**$ (144,395)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (144,395)	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	HVAC	$ 23,701,595	$ -	**$ 23,701,595**	$ 25,108,904	$ -	**$ 25,108,904**	$ (1,407,309)	$ -	**$ (1,407,309)**	$ 1,407,309		**$ 1,407,309**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 1,407,309	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Maintenance	$ 96,417	$ -	**$ 96,417**	$ -	$ -	**$ -**	$ 96,417	$ -	**$ 96,417**	$ (96,417)		**$ (96,417)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (96,417)	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Lighting	$ 1,929,586	$ -	**$ 1,929,586**	$ 6,506,206	$ -	**$ 6,506,206**	$ (4,576,620)	$ -	**$ (4,576,620)**	$ 4,576,620		**$ 4,576,620**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 4,576,620	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Miscellaneous	$ 2,508,593	$ -	**$ 2,508,593**	$ 4,659,398	$ -	**$ 4,659,398**	$ (2,150,805)	$ -	**$ (2,150,805)**	$ 2,150,805		**$ 2,150,805**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 2,150,805	-3.5%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Customer Enrollment	$ 4,275,486	$ -	**$ 4,275,486**	$ 6,574,479	$ -	**$ 6,574,479**	$ (2,298,993)	$ -	**$ (2,298,993)**	$ 2,298,993		**$ 2,298,993**	$ -	$ -	**$ -**		$ -	**$ -**	$ 2,298,993	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	In Home Education	$ 1,388,162	$ -	**$ 1,388,162**	$ 1,142,681	$ -	**$ 1,142,681**	$ 245,481	$ -	**$ 245,481**	$ (245,481)		**$ (245,481)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (245,481)	0.4%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Pilot	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**			**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Fund Shifting Offset		$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**			**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Energy Efficiency TOTAL	**$ 54,736,190**	**$ -**	**$ 54,736,190**	**$ 58,331,548**	**$ -**	**$ 58,331,548**	**$ (3,595,358)**	**$ -**	**$ (3,595,358)**	**$ 3,595,358**		**$ 3,595,358**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 3,595,358**	-5.8%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Training Center	$ 516,064	$ -	$ -	$ 194,534	$ -	$ 194,534	$ 321,530	$ -	**$ 321,530**	$ (321,530)		**$ (321,530)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (321,530)	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Inspections	$ 1,100,363	$ -	$ 1,100,363	$ 1,118,116	$ -	$ 1,118,116	$ (17,753)	$ -	**$ (17,753)**	$ 17,753		**$ 17,753**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ 17,753	0%	1. 2. 3.	1. 2. 3.	1. 2. . 3.	1. 2. 3.
	Marketing and Outreach	$ 950,000	$ -	$ 950,000	$ 908,803	$ -	$ 908,803	$ 41,197	$ -	**$ 41,197**	$ (41,197)		**$ (41,197)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (41,197)	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Statewide ME&O	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	**$ -**			**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	ME&E Studies	$ 91,250	$ -	$ 91,250	$ 150,274	$ -	$ 150,274	$ (59,024)	$ -	**$ (59,024)**	$ -		**$ -**	$ 59,024	$ -	**$ 59,024**	$ -	$ -	**$ -**	$ 59,024	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Regulatory Compliance	$ 464,382	$ -	$ 464,382	$ 440,011	$ -	$ 440,011	$ 24,371	$ -	**$ 24,371**	$ (24,371)		**$ (24,371)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (24,371)	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	General Administration	$ 4,001,434	$ -	$ 4,001,434	$ 3,674,470	$ -	$ 3,674,470	$ 326,964	$ -	**$ 326,964**	$ (326,964)		**$ (326,964)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ (326,964)	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	CPUC Energy Division	$ 60,000	$ -	$ 60,000	$ 31,635		$ 31,635	$ 28,365	$ -	**$ 28,365**			**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Total 2018 Authorized New Fund	**$ 61,919,683**	**$ -**	**$ 61,919,683**	**$ 64,849,390**	**$ -**	**$ 64,849,390**	**$ (2,929,707)**	**$ -**	**$ (2,929,707)**	**$ 2,899,049**	**$ -**	**$ 2,899,049**	**$ 59,024**	**$ -**	**$ 59,024**	**$ -**	**$ -**	**$ -**	**$ 2,958,073**	**-4.8%**				
	Authorized Unspent/Uncommitted Fund to be spent in 2018																								

	A	B
1	**Southern California Edison Company - PY 2018 Energy Savings Assistance Program Annual Report**	
2	**ESAP Table 13**	
3	**Categorical and Other Enrollment [1]**	
4		
5		
6	**Type of Enrollment**	**Number of Homes Treated**
7	Women, Infants, and Children Program (WIC)	5,906
8	Supplemental Security Income (SSI)	3,060
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	3,090
10	CalWORKs/Temporary Assistance for Needy Families (TANF)	254
11	Tribal TANF	5
12	Medicaid/Medi-Cal for Families	13,671
13	Healthy Families A&B	-
14	National School Lunch Program (NSLP) - Free Lunch	687
15	Low-income Home Energy Assistance Program (LIHEAP)	1
16	Bureau of Indian Affairs General Assistance	-
17	Head Start Income Eligible - (Tribal Only)	-
18	Targeted Self Certification	-
19		
20	Other - Categorical	738
21	Standard Enrollment	58,895
22	**Total**	**86,307**
23		
24		
25	[1] Summary data which includes ESA Program and CSD Leveraging efforts.	

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

Coordination Type [1]	Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings (kWh) [3]	Other Measureable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
Leveraging, Program Coordination, Datasharing	Grid Alternatives (Single-family Affordable Solar Homes (SASH) program administrator)	G.A. shares with SCE low income leads of homes on which they intend to install solar panels. SCE ensures those homes have been or will be enrolled in ESA.	Y	Y	$ 1,144	57,512	N	104		Y	
Leveraging, Datasharing	Other IOU ESA Programs (SCG, PG&E, SWG, Datasharing)	IOUs share lists of homes served in joint territories.	Y	Y	$ 496,793	24,975,139	N	45,163		Y	
Interdepartmental Integration, Program Coordination	Shared Marketing Materials & Resources	Bill Onsert: Article on resources to help reduce your bill provided to ~4.2 million customers, and included ESA.	N	N	$ 2,100,000	N/A	N	N/A		N	Generates awareness. Customers are then free to enroll in programs via multiple existing enrollment channels. Unable to track uniquely.
Program Coordination	Joint Contractor Across Programs	SCE used existing CMHP	Y	Y	N/A	1,061,864	N	1,592		N	This combination likely enhanced perceived value of both programs to potential participants when being asked to participate.

[1] Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.

[2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).
In 2016 SCE spent approximately $11 per Treated lead through marketing and outreach efforts. a) G.A.: 104 homes x $11 per home = $1,144. b) 45,163 Treated homes through other IOUs' ESA/low income programs at $11 per saved lead = $496,793.
In 2016 SCE spent on average $0.50 for each piece of collateral. e) 4.2 million Onserts x $0.50 = $2,100,00.

[3] Energy savings/benefits. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.
Average kWh saved per Treated home in PY2018 is 553 kWh as calculated from ESA Table 2 of this report: 47,222,851 kWh / 85,442 treated homes = 553 kWh/home. a) 104 ESA homes treated with Grid Alternatives x 553 kWh/Home = 57,512 kWh. b) 45,163 ESA homes treated via IOU datasharing x 553 kWh/Home = 24,975,139 kWh. c) 1,592 ESA Homes by CMHP Contractor x 553 kWh/Home = 880,376 kWh.

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

Southern California Edison Company - PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 15
Lighting [4]

ESA Program CFL Tracking Table

Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each

Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	Admin Cost (overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin) [1]	AB 1109 Compliant? [2]
N/A	N/A	N/A	N/A	N/A	N/A

Year	Number of Homes Treated in ESA Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs [3]
2009	62,624	33,642	4.2	2,269,248
2010	121,868	49,982	4.9	3,948,768
2011	93,771	54,615	4.9	4,529,616
2012	49,026	44,872	4.2	3,661,426
2013	69,031	61,471	4.2	6,493,686
2014	76,983	67,444	4.0	6,811,448
2015	54,127	43,258	4.9	4,449,325
2016	41,070	40,820	7.1	4,790,255
2017	80,333	45,185	5.3	3,959,404
2018	86,307	3,891	3.5	64,373

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

[2] Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?
Do all models comply with Europe's RoHS standards on toxicity?

[3] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.

	A	B	C	D	E	F	G
1	**Southern California Edison - PY 2018 Energy Savings Assistance Program Annual Report**						
2	**ESAP Table 16**						
3	**"Add Back" Measures**						
4							
5							
6			**Ratio of Benefits Over Costs**				
7	**Measure [1][2]**	**Climate Zone**	**ESACET**	**Resouce TRC**	**Quantity Installed**	**Budget Impact of "Add Back"**	**Lifecycle Bill Savings Impact**
8	Central AC - Mobile Home	13	-	-	7	$ 27,549	$ -
9	Central AC - Mobile Home	14	0.08	0.07	115	$ 420,592	$ 18,525
10	Central AC - Mobile Home	15	0.27	0.23	129	$ 480,384	$ 75,999
11	Central AC - Multi Family	14	0.06	0.05	23	$ 90,334	$ 3,308
12	Central AC - Multi Family	15	0.25	0.22	29	$ 103,144	$ 17,085
13	Central AC - Single Family	13	0.03	0.03	300	$ 1,393,554	$ 26,752
14	Central AC - Single Family	14	0.07	0.06	2,199	$ 8,638,288	$ 328,223
15	Central AC - Single Family	15	0.25	0.22	527	$ 2,042,663	$ 310,890
16	Central Heat Pump - Mobile Home	15	0.24	0.17	5	$ 25,195	$ 7,849
17	Central Heat Pump - Multi Family	15	0.22	0.15	124	$ 440,577	$ 123,997
18	Central Heat Pump - Single Family	15	0.14	0.10	19	$ 89,979	$ 16,543
19	Enclosure - Mobile Home	10	0.93	0.80	9	$ 778	$ 580
20	Enclosure - Mobile Home	14	0.53	0.46	5	$ 775	$ 291
21	Enclosure - Mobile Home	15	0.94	0.81	8	$ 656	$ 513

Southern California Edison - PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 17
Expenditures for Pilots and Studies

	Authorized 2018 Funding			2018 Expenses			% of Budget Expensed		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots									
Programmable Controllable Thermostat	$ 250,000	NA	$ 250,000			$ -	0	0	0
Total Pilots	**$250,000**	**$0**	**$250,000**	**$0**	**$0**	**$0**	**$0**	**$0**	**$0**
Studies									
Non Energy Benefits (NEB) Study	$ 45,000	NA	$ 45,000	$ 27,062		$ 27,062	0.601		0.601
Rapid Feedback Research and Analysis	$ 200,000	NA	$ 200,000	$ -		$ -	-	-	-
Low Income Needs Assessment Study	$ 150,000	NA	$ 150,000	$ 58,875		$ 58,875	0.393	-	0.393
Load Impact Evaluation Study	$ 165,000	NA	$ 165,000	$ 87,408		$ 56,824	0.530	-	0.530
2017 Potential and Goals Study	$ 90,000	NA	$ 90,000	$ -		$ -	-	-	-
Total Studies	**$650,000**	**$0**	**$650,000**	**$173,345**	**$0**	**$142,761**	0.267	-	0.220

Southern California Edison Company - PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 18
Miscellaneous (2nd Refrigerators, Education Only, A/C Cycling, etc.)

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

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

Measures	Units	Households that Only Received Education
In-Home Education	Home	11,236

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

Households for My Energy/My Account Platform		
Opt-Out	Already Enrolled	Opt-In
50,994	37,778	1,841

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

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

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

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

Southern California Edison - PY 2018 CARE Annual Report
CARE Table 1
Overall Program Expenses

Category	Overall Expenditures		Total	Authorized Budget	% of Budget Spent	Total Shifted	Shifted to/from?
	Electric	Gas					
Outreach	$3,026,935	$0	$3,026,935	$2,684,843	113%		
Processing, Certification, Recertification	$1,001,253	$0	$1,001,253	$900,000	111%		
Post Enrollment Verification	$815,749	$0	$815,749	$800,000	102%		
IT Programming	$1,002,194	$0	$1,002,194	$1,150,000	87%		
Cool Centers	$24,749	$0	$24,749	$43,264	57%		
Pilots (CHANGES)	$554,891	$0	$554,891	$525,000	106%		
Studies	$0	$0	$0	$0	0%		
Measurement & Evaluation	$0	$0	$0	$0	0%		
Regulatory Compliance [3]	$325,969	$0	$325,969	$470,400	69%		
General Administration	$609,509	$0	$609,509	$684,009	89%		
CPUC Energy Division	$73,815	$0	$73,815	$140,000	53%		
TOTAL Program Costs	**$7,435,063**	**$0**	**$7,435,063**	**$7,397,516**	**101%**	**$37,547**	
CARE Rate Discount	$376,226,811	$0	**$376,226,811**	$ 482,397,449	78%	$ -	
Service Establishment Charge Discount	$0	$0	**$0**	**$0**	0%	$ -	
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	**$383,661,874**	**$0**	**$383,661,874**	**$489,794,965**	**78%**	**$ 37,547**	

[1] This represented the authorized budget that approved on January 4, 2019, SCE 2018 Mid Cycle Advice Letter 3824-E. Due to the timing of the approval of AL 3824-E, the revenue collection for SCE's 2018 CARE
2] CARE is a "Two-way" Balancing Account, Any over or under spent in CARE Balancing Account will be transferred to PPAM.
[3] Included 2013-2015 CARE/ESA CPUC Audit invoice recorded in 2018, $61,425

Southern California Edison - PY 2018 CARE Annual Report

CARE Table 2

Enrollment, Recertification, Attrition, & Penetration

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment				
	Automatic Enrollment				Self-Certification (Income or Categorical)																			
	Inter-Utility [1]	Intra-Utility [2]	Leveraging [3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)	Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response [4]	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)
January	3,138	543	0	3,681	4,790	8,129	7,437	10	20,366	24,047	14,139	15,249	0	29,388	12,347	126	570	8,908	21,951	53,435	2,097	1,224,623	1,422,225	86.1%
February	2,849	1,048	0	3,897	4,060	5,323	6,905	10	16,298	20,195	14,876	15,669	0	30,545	12,861	114	560	16,632	30,167	50,740	-9,972	1,214,651	1,422,225	85.4%
March	5,357	697	0	6,054	4,511	7,290	7,281	14	19,096	25,150	14,600	21,907	0	36,507	11,274	122	575	3,129	15,100	61,657	10,050	1,224,701	1,422,225	86.1%
April	6,179	918	0	7,097	4,103	8,861	12,396	14	25,374	32,471	13,239	21,892	0	35,131	9,769	114	516	15,672	26,071	67,602	6,400	1,231,101	1,422,225	86.6%
May	5,670	999	0	6,669	3,859	7,135	5,216	10	16,220	22,889	17,565	18,032	0	35,597	12,287	197	725	13,098	26,307	58,486	-3,418	1,227,683	1,422,225	86.3%
June	5,427	312	0	5,739	4,313	7,290	5,587	4	17,194	22,933	17,166	17,072	0	34,238	13,032	149	817	7,007	21,005	57,171	1,928	1,229,611	1,422,225	86.5%
July	5,298	153	0	5,451	6,801	9,411	10,328	72	26,612	32,063	17,388	16,811	0	34,199	14,610	90	757	10,266	25,723	66,262	6,340	1,235,951	1,422,225	86.9%
August	4,513	216	0	4,729	11,169	8,613	10,930	87	30,799	35,528	16,172	17,772	0	33,944	16,829	76	637	10,466	28,008	69,472	7,520	1,243,471	1,422,225	87.4%
September	4,411	257	0	4,668	7,545	9,496	8,087	111	25,239	29,907	12,924	20,760	0	33,684	13,054	97	524	12,777	26,452	63,591	3,455	1,246,926	1,422,225	87.7%
October	5,066	279	0	5,345	4,573	8,652	6,531	115	19,871	25,216	10,601	16,628	0	27,229	14,471	75	448	22,537	37,531	52,445	-12,315	1,234,611	1,422,225	86.8%
November	3,705	329	0	4,034	3,633	9,511	4,435	52	17,631	21,665	13,986	15,847	0	29,833	11,152	65	515	32,238	43,970	51,498	-22,305	1,212,306	1,422,225	85.2%
December	4,153	409	0	4,562	3,579	6,543	3,851	6	13,979	18,541	16,227	16,104	0	32,331	10,725	9	569	14,005	25,308	50,872	-6,767	1,205,539	1,422,225	84.8%
YTD Total	**55,766**	**6,160**	**0**	**61,926**	**62,936**	**96,254**	**88,984**	**505**	**248,679**	**310,605**	**178,883**	**213,743**	**0**	**392,626**	**152,411**	**1,234**	**7,213**	**166,735**	**327,593**	**703,231**	**-16,987**	**1,205,539**	**1,422,225**	**84.8%**

[1] Enrollments via data sharing between the IOUs.
[2] Enrollments via data sharing between departments and/or programs within the utility.
[3] Enrollments via data sharing with programs outside the IOU that serve low-income customers.
[4] No response includes no response to both Recertification and Verification.

Southern California Edison - PY 2018 CARE Annual Report

CARE Table 3A - Post-Enrollment Verification Results (Model) 2018

Month	Total CARE Households Enrolled	Households Requested to Verify[1]	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible)[2]	Total Households De-enrolled[3]	% De-enrolled through Post Enrollment Verification[4]	% of Total CARE Households De-enrolled
January	1,224,623	4,743	0.39%	3,235	72	3,307	69.72%	0.27%
February	1,214,651	3,987	0.33%	2,634	87	2,721	68.25%	0.22%
March	1,224,701	7,468	0.61%	5,084	135	5,219	69.88%	0.43%
April	1,231,101	6,929	0.56%	4,872	118	4,990	72.02%	0.41%
May	1,227,683	7,955	0.65%	5,896	120	6,016	75.63%	0.49%
June	1,229,611	6,861	0.56%	5,209	75	5,284	77.02%	0.43%
July	1,235,951	7,691	0.62%	5,873	107	5,980	77.75%	0.48%
August	1,243,471	160	0.01%	101	1	102	63.75%	0.01%
September	1,246,926	126	0.01%	57	0	57	45.24%	0.00%
October	1,234,611	65	0.01%	41	0	41	63.08%	0.00%
November	1,212,306	10	0.00%	9	0	9	90.00%	0.00%
December	1,205,539	1	0.00%	0	0	0	0.00%	0.00%
YTD Total	**1,205,539**	**45,996**	**3.82%**	**33,011**	**715**	**33,726**	**73.32%**	**2.80%**

[1] Includes all customers who failed SDG&E's CARE eligibility probability model.
[2] Includes customers verified as over income or who requested to be de-enrolled.
[3] Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending due to the time
[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.

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

PY 2018

Month	Total CARE Households Enrolled	Households Requested to Verify [1]	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) [2]	Total Households De-enrolled [3]	% De-enrolled through HUV Post Enrollment Verification	% of Total CARE Households De-enrolled
January	1,224,623	2,492	0.20%	2,284	30	2,314	92.86%	0.19%
February	1,214,651	3,510	0.29%	3,217	39	3,256	92.76%	0.27%
March	1,224,701	1,054	0.09%	959	11	970	92.03%	0.08%
April	1,231,101	1,861	0.15%	1,710	19	1,729	92.91%	0.14%
May	1,227,683	802	0.07%	725	8	733	91.40%	0.06%
June	1,229,611	1,926	0.16%	1,797	19	1,816	94.29%	0.15%
July	1,235,951	976	0.08%	928	1	929	95.18%	0.08%
August	1,243,471	11,449	0.92%	10,978	53	11,031	96.35%	0.89%
September	1,246,926	16,622	1.33%	16,118	31	16,149	97.15%	1.30%
October	1,234,611	21,773	1.76%	21,192	41	21,233	97.52%	1.72%
November	1,212,306	887	0.07%	837	2	839	94.59%	0.07%
December	1,205,539	1,205	0.10%	964	19	983	81.58%	0.08%
YTD Total	**1,205,539**	**64,557**	**5.36%**	**61,709**	**273**	**61,982**	**96.01%**	**5.14%**

[1] Includes all participants who were selected for high usage verification process.
[2] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

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

	A	B	C	D	E	F	G
1	**Southern California Edison - PY 2018 CARE Annual Report**						
2	**CARE Table 4**						
3	**CARE Self-Certification and Self-Recertification Applications[1]**						
4		**Provided**	**Received**	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**
5	Total (Y-T-D)	1,318,425	1,099,159	695,339	101,942	147,635	301,878
6	Percentage	N/A	100%	63%	9%	N/A	27%
7							
8	[1] Includes sub-metered customers.						
9							

	A	B	C	D	E	F	G	H	I	J
1	**Southern California Edison - PY 2018 CARE Annual Report**									
2	**CARE Table 5**									
3	**CARE Enrollment by County**									
4	**County**	**Estimated Eligible**			**Total Participants**			**Penetration Rate**		
5		**Urban**	**Rural [1]**	**Total**	**Urban**	**Rural**	**Total**	**Urban**	**Rural**	**Total**
6	**Fresno**	302	0	**302**	40	0	**40**	13%	0%	**13%**
7	**Imperial**	0	206	**206**	0	72	**72**	0%	35%	**35%**
8	**Inyo**	7	1,886	**1,893**	0	1,012	**1,012**	0%	54%	**53%**
9	**Kern**	13,480	17,682	**31,162**	8,979	14,003	**22,982**	67%	79%	**74%**
10	**Kings**	0	7,652	**7,652**	0	8,990	**8,990**	0%	117%	**117%**
11	**Los Angeles**	578,948	3,661	**582,609**	505,126	1,500	**506,626**	87%	41%	**87%**
12	**Madera**	3	0	**3**	0	0	**0**	0%	0%	**0%**
13	**Mono**	0	2,302	**2,302**	0	788	**788**	0%	34%	**34%**
14	**Orange**	196,110	1	**196,111**	150,906	0	**150,906**	77%	0%	**77%**
15	**Riverside**	101,899	96,883	**198,782**	80,090	90,388	**170,478**	79%	93%	**86%**
16	**San Bernardino**	209,336	41,653	**250,989**	186,745	36,619	**223,364**	89%	88%	**89%**
17	**San Diego**	0	1	**1**	0	1	**1**	0%	100%	**100%**
18	**Santa Barbara**	20,684	0	**20,684**	9,788	0	**9,788**	47%	0%	**47%**
19	**Tulare**	13,794	46,498	**60,292**	12,192	43,695	**55,887**	88%	94%	**93%**
20	**Ventura**	66,621	2,616	**69,237**	52,839	1,766	**54,605**	79%	68%	**79%**
21	**Total**	**1,201,185**	**221,040**	**1,422,225**	**1,006,705**	**198,834**	**1,205,539**	**84%**	**90%**	**85%**
22										
23										
24	[1] Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns									
25	and rural areas within large metropolitan counties.									
26										

	A	B	C	D	E	F	G	H
1	**Southern California Edison - PY 2018 CARE Annual Report**							
2	**CARE Table 6**							
3	**CARE Recertification Results**							
4	**2017**	**Total CARE Households**	**Households Requested to Recertify [1]**	**% of Households Total (C/B)**	**Households Recertified [2]**	**Households De-enrolled [3]**	**Recertification Rate % [4] (E/C)**	**% of Total Households De-enrolled (F/B)**
5	January	1,224,623	27,553	2.2%	16,227	11,278	59%	0.92%
6	February	1,214,651	18,719	1.5%	10,262	8,395	55%	0.69%
7	March	1,224,701	26,006	2.1%	14,699	11,169	57%	0.91%
8	April	1,231,101	27,881	2.3%	16,321	11,547	59%	0.94%
9	May	1,227,683	29,651	2.4%	17,603	11,987	59%	0.98%
10	June	1,229,611	30,080	2.4%	18,139	11,882	60%	0.97%
11	July	1,235,951	27,648	2.2%	16,595	11,047	60%	0.89%
12	August	1,243,471	23,095	1.9%	12,744	10,339	55%	0.83%
13	September	1,246,926	26,677	2.1%	14,629	12,023	55%	0.96%
14	October	1,234,611	26,309	2.1%	14,223	12,063	54%	0.98%
15	November	1,212,306	29,369	2.4%	17,394	10,540	59%	0.87%
16	December	1,205,539	23,713	2.0%	13,107	1,655	55%	0.14%
17	**YTD**	**1,205,539**	**316,701**	**26.3%**	**181,943**	**123,925**	**57%**	**10.28%**
18								
19	[1] Excludes count of customers recertified through the probability model.							
20	[2] Recertification results are tied to the month initiated and the recertification process allows customers 90 days (3 or 4 bill cycles) to respond to the							
21	[3] Includes customers who did not respond or who requested to be de-enrolled.							
22	[4] Percentage of customers recertified compared to the total participants requested to recertify in that month.							

	A	B	C	D	E	F	G	H	I
1	**Southern California Edison - PY 2018 CARE Annual Report**								
2	**CARE Table 7**								
3	**CARE Capitation Contractors**								
4	**Contractor Name [1]**	**Contractor Type (Check one or more if applicable)**				**Enrollments[2]**			**Total Expenditures**
5		**Private**	**CBO**	**WMDVBE**	**LIHEAP**	**Rural**	**Urban**	**Total**	
6	ALPHA ENTERPRISES		x			0	0	0	$0
7	APAC SERVICE CENTER	x				0	33	33	$660
8	ARMENIAN RELIEF SOCIETY	x				0	0	0	$0
9	ASIAN AMERICAN DRUG ABUSE PROG	x				0	10	10	$200
10	ASIAN AMERICAN RESOURCE CENTER	x		x		0	2	2	$40
11	ASIAN YOUTH CENTER	x				0	0	0	$0
12	BEST PARTNERS	x				0	392	392	$7,840
13	BETHEL BAPTIST CHURCH	x				0	0	0	$0
14	BISHOP PAIUTE TRIBE	x				0	0	0	$0
15	C.O.R. COMM DEVELOPMENT CORP	x				0	0	0	$0
16	CAREGIVERS VOLUNTEERS ELDERLY		x			0	0	0	$0
17	CHINESE CHRISTIAN HERALD CRUS.	x				0	3	3	$60
18	CHINO NEIGHBORHOOD HOUSE		x			0	0	0	$0
19	CITIHOUSING REAL ESTATE SERVIC		x			0	0	0	$0
20	CITY IMPACT	x				0	0	0	$0
21	CITY OF BEAUMONT SENIOR CENTER		x	x		0	0	0	$0
22	COMMUNITY HEALTH INITIATIVE of OC (AKA: Volunteer Center of Greater Orange County dba OneOC)	x				0	0	0	$0
23	CORONA NORCO FAMILY YMCA	x				0	1	1	$20
24	DESERT ARC	x				0	0	0	$0
25	DESERT MANNA MINISTRIES INC	x				0	0	0	$0
26	DISABLED RESOURCES CTR, INC		x	x		0	4	4	$80
27	EL CONCILIO DEL CONDADO DE	x		x		0	0	0	$0
28	FAMILY SVC ASSOC OF REDLANDS	x				0	0	0	$0
29	FOOD SHARE	x				0	0	0	$0
30	GO THE CALENDAR		x			0	1	1	$20
31	HELP OF OJAI, INC.	x				0	0	0	$0
32	HOUSING AUTHORITY OF KINGS CO	x		x		0	1	1	$20
33	KERNVILLE UNION SCHOOL DISTRIC	x				0	1	1	$20
34	KINGS COMMUNTITY ACTION ORG	x				0	0	0	$0
35	KINGS CTY COMMISSION ON AGING	x				0	0	0	$0
36	LA COUNTY HOUSING AUTHORITY		x			0	0	0	$0
37	LEAGUE OF CALIF HOMEOWNERS	x				0	0	0	$0
38	LTSC COMM. DEVEL. CORP	x				0	9	9	$180
39	MENIFEE VALLEY CHAMBER		x			0	0	0	$0
40	MEXICAN AMERICAN OPPORTUNITY		x	x		0	0	0	$0
41	MTN COMM FAM RESOURCE CNTR	x				0	5	5	$100
42	NEW GREATER CIR. MISSION, INC	x				0	0	0	$0
43	NEW HOPE VILLAGE, INC	x				0	3	3	$60
44	NEW HORIZONS CAREGIVERS GROUP		x			0	4	4	$80
45	OCCC	x				0	0	0	$0
46	OPERATION GRACE	x				0	0	0	$0
47	OUR COMMUNITY WORKS	x				0	3	3	$60
48	PACIFIC ISLANDER HLTH (PIHP)	x				0	0	0	$0
49	PACIFIC PRIDE FOUNDATION	x				0	0	0	$0
50	RIVERSIDE DEPT COMM ACTION		x	x	x	0	25	25	$500
51	SALVATION ARMY SANTA FE SPGS	x				0	8	8	$160
52	SALVATION ARMY VISALIA CORPS	x				0	0	0	$0
53	SANTA ANITA FAMILY SERVICE	x				0	0	0	$0
54	SENIOR ADVOCATES OF THE DESERT	x				0	0	0	$0
55	SHARE OUR SELVES	x				0	0	0	$0
56	SMILES FOR SENIORS FOUND.	x				0	0	0	$0
57	SOUTHEAST CITIES SERVICE CTR.		x			0	0	0	$0
58	SOUTHEAST COMMUNITY DEVELOPMEN	x				0	0	0	$0
59	ST VINCENT DE PAUL		x			0	0	0	$0
60	THE CAMBODIAN FAMILY	x				0	0	0	$0
61	UNITED CAMBODIAN COMMUNITY INC		x			0	0	0	$0
62	VICTOR VALLEY COMM SVC COUNCIL	x				0	0	0	$0
63	VIETNAMESE COMMUNITY OF OC INC	x				0	0	0	$0
64	VOLUTNEERS OF EAST LOS ANGELES	x		x		0	0	0	$0
65	XFINITI SOLUTIONS, LLC		x			0	0	0	$0
66	**Total Enrollments and Expenditures**					**0**	**505**	**505**	**$10,100**
67									
68	[1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.								
69	[2] Enrollments reflect new enrollments only.								

	A	B	C	D	E	F	G	H
1	**Southern California Edison - PY 2018 CARE Annual Report**							
2	**CARE Table 8**							
3	**CARE Participants as of Month-End**							
4	**2018**	**Gas and Electric**	**Gas Only**	**Electric Only**	**Total**	**Eligible Households**	**Penetration Rate**	**% Change**
5	**January**	0	N/A	1,224,623	1,224,623	1,422,225	86%	0%
6	**February**	0	N/A	1,214,651	1,214,651	1,422,225	85%	-1%
7	**March**	0	N/A	1,224,701	1,224,701	1,422,225	86%	1%
8	**April**	0	N/A	1,231,101	1,231,101	1,422,225	87%	0%
9	**May**	0	N/A	1,227,683	1,227,683	1,422,225	86%	0%
10	**June**	0	N/A	1,229,611	1,229,611	1,422,225	86%	0%
11	**July**	0	N/A	1,235,951	1,235,951	1,422,225	87%	0%
12	**August**	0	N/A	1,243,471	1,243,471	1,422,225	87%	1%
13	**September**	0	N/A	1,246,926	1,246,926	1,422,225	88%	0%
14	**October**	0	N/A	1,234,611	1,234,611	1,422,225	87%	-1%
15	**November**	0	N/A	1,212,306	1,212,306	1,422,225	85%	-2%
16	**December**	0	N/A	1,205,539	1,205,539	1,422,225	85%	0%
17								
18								

	A	B	C	D	E
1	**Southern California Edison - PY 2018 CARE Annual Report**				
2	**CARE Table 9**				
3	**CARE Average Monthly Usage & Bill**				
4					
5	**Average Monthly Gas / Electric Usage**				
6	**Residential Non-CARE vs. CARE Customers**				
7	**Customer**	**Gas Therms**	**Gas Therms**	**Total**	
8		**Tier 1**	**Tier 2**		
9	Non-CARE	61.8	3.9	65.8	
10	CARE	12.8	1.1	13.9	
11	**Customer**	**Electric KWh**	**Electric KWh**	**Total**	
12		**Tier 1**	**Tier 2 and Above**		
13	Non-CARE	292	241	533	
14	CARE	319	184	503	
15					
16					
17	**Average Monthly Gas / Electric Bill[2]**				
18	**Residential Non-CARE vs. CARE Customers[1]**				
19	**(Dollars per Customer)**				
20	**Customer**	**Gas**	**Electric**		
21	Non-CARE	$55.63	$106.90		
22	CARE	$49.05	$57.02		
23					
24					
25	[1] Excludes master-meter usage.				
26	[2] Average Monthly Gas/Electric Bill reflects residential Non-CARE (CARE) total billed				
27	revenues divided by the average number of Non-CARE (CARE) monthly bills.				
28					
29					
30					

	A	B	C	D	E	F
1	**Southern California Edison - PY 2018 CARE Annual Report**					
2	**CARE Table 10**					
3	**CARE Surcharge & Revenue**					
4	**Electric**					
5	**CARE Surcharge and Revenue Collected by Customer Class**					
6	**Customer Class**	**Average Monthly CARE Surcharge[1]**	**Average Monthly Bill**	**CARE Surcharge as Percent of Bill**	**Total CARE Surcharge Revenue Collected**	**Percentage of Total CARE Surcharge Revenue Collected**
7	Residential[1]	$9,069,578	$417,360,256	2.2%	$108,834,936	28.3%
8	Agricultural	$683,223	$18,810,069	3.6%	$8,198,679	2.1%
9	Commercial	$17,746,051	$465,993,632	3.8%	$212,952,615	55.4%
10	Industrial	$2,860,195	$48,108,443	5.9%	$34,322,344	8.9%
11	Public Authority	$1,650,685	$40,279,328	4.1%	$19,808,221	5.2%
12	Railroads	$36,106	$997,960	3.6%	$433,278	0.1%
13	Interdepartmental[2]	$423	$18,701	2.3%	$5,072	0.0%
14						
15						
16						
17	**GAS**					
18	**CARE Surcharge and Revenue Collected by Customer Class**					
19	**Customer Class**	**Average Monthly CARE Surcharge2**	**Average Monthly Bill**	**CARE Surcharge as Percent of Bill**	**Total CARE Surcharge Revenue Collected**	**Percentage of Total CARE Surcharge Revenue Collected**
20	Residential	$646	$45,792	1.4%	$7,748	35.1%
21	Commercial	$1,193	$98,486	1.2%	$14,310	64.9%
22	Natural Gas Vehicle	$0	$0	0.0%	$0	0.0%
23	Industrial	$0	$0	0.0%	$0	0.0%
24						
25	[1] Excludes CARE customers. Pursuant to D. 15-07-001, OP 4 and Section 11.1.1 authorizes adjustments to CARE to transition to the legislatively-mandated CARE discount range in compliance with Section 739.1 were authorized.					
26	2 Electricity supplied for Edison-owned water & gas operations on Santa Catalina Islands					
27						

	A	B	C	D	E	F	G
1	**Southern California Edison - PY 2018 CARE Annual Report**						
2	**CARE Table 11**						
3	**CARE Capitation Applications[1]**						
4	**Entity**	**Total Received**	**Approved[2]**	**Denied**	**Pending/ Never Completed**	**Duplicate**	
5	APAC SERVICE CENTER	63	33	6	0	24	
6	ASIAN AMERICAN DRUG ABUSE PROG	21	10	0	0	11	
7	ASIAN AMERICAN RESOURCE CENTER	4	2	0	0	2	
8	BEST PARTNERS	392	392	0	0	0	
9	CHINESE CHRISTIAN HERALD CRUS.	5	3	2	0	0	
10	CORONA NORCO FAMILY YMCA	1	1	0	0	0	
11	DISABLED RESOURCES CTR, INC	4	4	0	0	0	
12	GO THE CALENDAR	1	1	0	0	0	
13	HOUSING AUTHORITY OF KINGS CO	3	1	0	0	2	
14	KERNVILLE UNION SCHOOL DISTRIC	1	1	0	0	0	
15	LTSC COMM. DEVEL. CORP	9	9	0	0	0	
16	MTN COMM FAM RESOURCE CNTR	7	5	1	0	1	
17	NEW HOPE VILLAGE, INC	3	3	0	0	0	
18	NEW HORIZONS CAREGIVERS GROUP	4	4	0	0	0	
19	OUR COMMUNITY WORKS	4	3	0	0	1	
20	RIVERSIDE DEPT COMM ACTION	59	25	10	0	24	
21	SALVATION ARMY SANTA FE SPGS	13	8	3	0	2	
22	**Total**	**594**	**505**	**22**	**0**	**67**	
23							
24							
25	[1] Includes sub-metered customers.						
26	[2] Includes new enrollments and recertification applications approved.						

	B	C	D	E	F	G	H
1	**Southern California Edison - PY 2018 CARE Annual Report**						
2	**CARE Table 12**						
3	**CARE Expansion Program**						
4							
5	**Participating Facilities by Month**						
6	**2018**	**Gas**			**Electric**		
7		**CARE Residential Facilities**	**CARE Commercial Facilities**	**Total Gas**	**CARE Residential Facilities**	**CARE Commercial Facilities**	**Total Electric**
8	**January**	0	0	0	366	159	525
9	**February**	0	0	0	359	156	515
10	**March**	0	0	0	354	156	510
11	**April**	0	0	0	353	156	509
12	**May**	0	0	0	351	155	506
13	**June**	0	0	0	352	155	507
14	**July**	0	0	0	358	150	508
15	**August**	0	0	0	353	152	505
16	**September**	0	0	0	343	153	496
17	**October**	0	0	0	339	154	493
18	**November**	0	0	0	338	154	492
19	**December**	0	0	0	335	154	489
20							
21							
22	**Average Monthly Gas / Electric Usage[1]**						
23	**Customer**	**Gas**	**Electric**				
24		**Therms**	**KWh**				
25	Residential Facilities	N/A	999				
26	Commercial Facilities	N/A	11,515				
27							
28							
29	**CARE Expansion Self-Certification and Self-Recertification Applications**						
30		**Received**	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**	
31	Total	460	294	168	1	0	
32	Percentage		64%	37%	0%	0%	
33							
34							
35	[1] Excludes master meter usage.						

	A	B	C	D	E	F	G	H	I	J
1	**Southern California Edison - PY 2018 CARE Annual Report**									
2	**CARE Table 13**									
3	**CARE High Usage Verification Results[5]**									
4										
5	**Stage 1 - IRS Documentation and ESA Agreement**				**Stage 2 - ESA Participation**			**Stage 3 - Usage Monitoring**		
6	**Households Requested to Verify**	**Removed (No Response)**	**Removed (Verified Ineligible)[1]**	**Income Verified and Referred to ESA**	**Failed and Removed[2]**	**Ineligible[3]**	**Completed**	**Removed[4]**	**Appeals Denied**	**Appeals Approved**
7	64,557	61,962	273	3,609	2,195	285	1,129	253	6	18
8										
9	[1] Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.									
10	[2] Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms.									
11	[3] Includes customers who previously participated in ESA Program, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.									
12	[4] Customers removed for exceeding 600% of baseline in any monthly billing cycle.									
13	[5] High usage is defined as a customer that exceeds 400% or 600% of baseline.									

Southern California Edison - PY 2018 CARE Annual Report

CARE Table 13A

CARE Customer Usage and ESA Program Treatment

# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV[1]	Percent of those CARE customers Not served by ESA Program[2]	# of Enrollments led to ESA Program measure Installations[3]	# of Long-Term tenancy CARE customers who have Not applied for ESA Program[4]	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment				Energy Usage of CARE customers who do Not accept ESA Program treatment
				Energy Usage before ESA Program treatment [5]	Energy Usage within 3-months of ESA Program treatment	Energy Usage within 6-months of ESA Program treatment	Energy Usage within 12-months of ESA Program treatment	
60,240	91%	2,941	54,679	894	933	950	952	914

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

	A	B	C
1	**Southern California Edison - PY 2018 CARE Annual Report**		
2	**CARE Table 14**		
3	**Categorical Enrollment**		
4	**Type of Enrollment**	**Number of Customer Enrollments[1]**	
5	Bureau of Indian Affairs General Assistance	477	
6	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	63,182	
7	CalWORKs/Temporary Assistance for Needy Families (TANF) 2	-	
8	Head Start Income Eligible - (Tribal Only)	1,588	
9	Healthy Families A&B	32,279	
10	Low-income Home Energy Assistance Program (LIHEAP)	5,898	
11	Medicaid/Medi-Cal	146,148	
12	National School Lunch Program (NSLP) - Free Lunch	44,810	
13	Supplemental Security Income (SSI)	30,517	
14	Tribal TANF 2	13,881	
15	VRU - State Programs	444	
16	Women, Infants, and Children Program (WIC)	42,777	
17			
18			
19	[1] Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.		
20	[2] CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.		

Appendix 2

SCE's FERA Programs Annual Report for Program Year 2018

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

Family Electric Rate Assistance (FERA) Program

For The Period January — December 2018

May 1, 2019

Table of Contents

1. Participant Information 1

1.1 Provide the total number of FERA customers by month for the reporting period. 1
1.2 Provide the total number of FERA-eligible households, FERA-participating households, and FERA household penetration rates by quarter. 1
1.3 Discuss how the estimates of current FERA-eligible households were developed. 2
1.4 Provide the current FERA sub-metered tenant counts at year-end. 3
1.5 Discuss any problems encountered during the reporting period administering the FERA program for sub-metered tenants and/or master-meter customers. 3

2. Program Costs 3

2.1 Discount Cost 3
2.2 Administrative Cost [S. Loi/Vuong] 3
2.3 Explain what is included in each administrative cost category. 4
2.4 Explain how costs of joint CARE / FERA activities are charged to each program. 5
2.5 Provide the year-end December 31 balances for the FERA balancing account for both the current and prior reporting periods. 5

3. Outreach

3.1 Discuss utility outreach activities and those undertaken by third parties on the utility's behalf. 6
3.2 Discuss each of the following: 6
3.3 Discuss each of the following: 17

4. Processing FERA Applications 18

4.1 Processing Self-Certification and Self-Recertification Applications (individual and sub-metered customers) 18
4.2 Processing Random Post-Enrollment Verification Requests 18

5. Program Management 19

5.1 Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed. 19

1. Participant Information

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

See Table 1, below.

Table 1. FERA Customers Enrolled

2018	FERA Enrolled	FERA Receiving Tier 3 Benefit[1]
January	19,172	N/A
February	19,213	N/A
March	19,367	N/A
April	19,494	N/A
May	19,467	N/A
June	19,511	N/A
July	19,655	N/A
August	19,680	N/A
September	19,360	N/A
October	19,160	N/A
November	19,203	N/A
December	19,141	N/A

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

See Table 2, below.

Table 2. FERA Penetration Rate

2018 Quarter Ending	FERA-Eligible Households	FERA-Participating Households	FERA Household Penetration Rate[2]
March 31	220,081	19,367	8.80%
June 30	220,081	19,511	8.87%
September 30	220,081	19,360	8.80%
December 31	220,081	19,141	8.70%

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

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

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

To develop the FERA penetration estimates for 2018, SCE and the joint IOUs[3] used the joint utility methodology adopted by the California Public Utilities Commission (Commission or CPUC) in Decision (D.) 01-03-028. This method entails an annual estimation of eligibility for California Alternate Rates for Energy (CARE), FERA, Energy Savings Assistance (ESA), and other income-by-household-size parameters at the small area level (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state.

The requirements for 2018 eligibility, corresponding to the current estimation, again used the January Health and Human Services (HHS) Poverty Guidelines,[4] "bundling" one-and two-person households at the HHS-defined 200% Federal Poverty Guideline (FPG) limit as required by AB 327.

Sources for the estimation process include:

- The current HHS guidelines
- Current-year-small-area, vendor-marginal distributions on household characteristics
- Census 2010 SF3 data
- Census American Community Survey 2011-2016 Public Use Microdata Sample (PUMS) data
- Utility meter and master meter household counts
- Department of Finance Consumer Price Index series, and
- Various Geographic Information System sources.

An important change has been implemented since 2011, which involves adjusting small area (block group) income distributions to match the latest American Community Survey distributions at the Public Use Microdata Area.

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

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

In 2009, the method was augmented to better incorporate the impact of labor force changes (unemployment and other forms of job separation, and positive changes

[3] SCE, Pacific Gas and Electric Company, San Diego Gas and Electric Company, and Southern California Gas Company.

[4] Federal Register / Vol. 83, No. 12 / Thursday, January 18, 2018 / Notices; p.2643.

expected to occur in California after the recession). The method adjusted block group marginal distributions on household income based on sub-state modeling that incorporated data from Current Population Survey, Integrated Public Use Microdata Survey, American Community Survey, and California Employment Development Department County and Metropolitan Statistical Area level labor force series. This adjustment to block group income marginal distributions is then incorporated into the otherwise "standard" estimation approach to produce small-area estimates reflecting small-area income changes due to labor market forces.

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

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

As of December 31, 2018, 73 sub-metered tenants were participating in FERA.

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

SCE encountered no problems administering the sub-metered FERA program during 2018.

2. Program Costs

2.1 Discount Cost

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

The average monthly FERA discount received in dollars per FERA customer was $16.20.[5]

2.1.2 State the cumulative annual discount for all FERA customers.

The cumulative annual discount for all FERA customers was $3,100,000.[6]

2.2 Administrative Cost

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

See Table 3, below.

---

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

6 *Id.*

Table 3. FERA Program Administrative Costs by Category and Benefits

Category	$ Cost
Outreach / Marketing	$ 276,523.00
Processing, Certification, Recertification [7]	$ 0.00
Post Enrollment Verification [5]	$ 0.00
General Administration [5]	$ 0.00
Information Technology	$ 50,241.00
Capitation	$ 0.00
TOTAL PROGRAM COSTS	$ **326,764.00**
TOTAL CUSTOMER BENEFITS	$ **3,100,000.00**
TOTAL PROGRAM COSTS & CUSTOMER BENEFITS	$ **3,426,764.00**

2.3 Explain what is included in each administrative cost category.

See Table 4, below.

Table 4. Administrative Cost Categories

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

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

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

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

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

SCE's FERA Balancing Account was closed prior to December 31, 2009. In A.08-05-026, SCE proposed to:

- Include FERA-related O&M Administrative funding in the authorized CARE administrative revenue requirement
- Record actual FERA-related expenses in the CARE Balancing Account (CBA)
- Transfer the December 31, 2008 Family Electric Rate Assistance Balancing Account (FERABA) balance to the Public Purpose Programs Adjustment Mechanism (PPPAM) balancing account, and
- Eliminate Preliminary Statement, Part Z, FERABA.

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

3. Outreach

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

SCE's goal is to enroll as many eligible customers as are willing to participate in FERA. FERA enrollment decreased from 19,662 in December 31, 2017, to 19,141 in December 31, 2018, which represents a net decrease of 521 households.

FERA outreach was conducted as an adjunct to CARE outreach from January through December 2018:

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

3.2 Discuss each of the following:

3.2.1 The CHANGES Program

The Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program was initially approved by the Commission as a one-year pilot program.[8] D.15-12-047 approved the establishment of the CHANGES as an ongoing statewide program, effective January 1, 2016[9]. The program provides outreach, education, and bill issue assistance to limited English proficient customers. The program is administered through a contract with the CPUC, using the same community contractor, Self Help for the Elderly, and 28 CBOs, which also administer the CPUC's Telecommunications Education and Assistance in Multiple-Languages (TEAM) program.

[8] Approved November 19, 2010, Resolution CSID-004

[9] D.15-12-047 p.1.

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

1. ACC Senior Services
2. Afghan Coalition
3. Alliance for African Assistance
4. American Relief Society
5. Asian American Resource Center
6. Asian Community Center
7. CASA Familiar
8. Central California Legal Services
9. Centro la Familia Advocacy Services, Inc.
10. Chinatown Service Center
11. Chinese Newcomers Service Center
12. Deaf Community Services of San Diego
13. Delhi Center
14. El Concilio of San Mateo County
15. Fresno Center for New Americans
16. Good Samaritan Family Resource Center
17. International Institute of Los Angeles
18. International Rescue Committee
19. Korean American Community Services
20. Koreatown Youth And Community Center
21. Lao Khmu Association, Inc.
22. Little Tokyo Service Center
23. Madera Coalition for Community Justice
24. Portuguese Community Center
25. Self-Help for the Elderly
26. Southeast Asian Community Center
27. SUSCOL Intertribal Council
28. Southland Integrated Services

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

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

- **Education:** The education component includes trainings, workshops, or one-to-one technical assistance for customers on various topics. Some topics covered include: avoiding disconnections, payment arrangements, assistance programs available, how to read a utility bill, tiered rates, and energy conservation.

- **Dispute and Need Resolution:** CBOs work directly with customers and utilities to assist with issues such as bill inquiries, payment arrangements, avoidance of service disconnections, and restoration of service. The CHANGES program provides assistance in 36 languages.
- **Outreach:** CBOs leverage the existing TEAM outreach activities as an opportunity to introduce information about CHANGES, provide new energy-related materials, and market the program via various media outlets.

In 2018, based on the program administrator's monthly reports, CHANGES completed activities shown in Table 3.2.1a - d below for SCE:

Table 3.2.1a. Activity: Disputes Resolved: By Service

SCE -- Disputes Resolved	
Add Level Pay Plan	2
Assisted with CARE Re-Certification/Audit	1
Changed 3rd Party Company	2
Consumer Education Only (must be pre-approved)	1
Medical Baseline Application	0
Enroll in Energy Assistance Programs	19
Request Meter Service or Testing	0
Request Bill Adjustment	4
Request Customer Service Visit	0
Schedule Energy Audit	0
Payment Extension	21
Payment Plan	57
Solar	5
Stop Disconnection	44
Time of Use	5
Wildfire Related Issue	0
TOTAL	**161**

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

Table 3.2.1b. Activity: Disputes Resolved: By Language

SCE -- Disputes Resolved by Language	
English	56
Eritrean	1
Farsi	1
French	3
Korean	2
Mandarin	2

SCE -- Disputes Resolved by Language	
Samoan	1
Spanish	46
Tagalog	1
Vietnamese	2
TOTAL	**115**

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

Table 3.2.1c. Activity: Needs Assistance: By Service

SCE – Needs Assistance	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	9
Assisted with Changes to Account	18
Energy Efficiency Tool	4
Assisted High Energy User with CARE Doc Submission	1
Assisted with Reconnection	1
Billing Language Changed	0
Consumer Education Only	0
Electricity Aggregation	1
Energy Alerts	0
Energy Assistance Fund (SCE)	69
Energy Assistance Fund (PG&E)	0
Enrolled in Demand Response Programs	0
ESAP	32
Gas Assistance Fund (SCG)	0
HEAP	352
Medical Baseline	31
Neighbor to Neighbor (SDG&E)	0
REACH	0
Reported Safety Problem	1
Reported Scam	1
Set Up 3rd Party Notification	0
Set Up New Account	1
Payment Extension	28
Payment Plan	23
Wildfire Related Issue	0
TOTAL	**572**

Table 3.2.1d. Activity: Needs Assistance: By Language

SCE – Needs Assistance by Language	
Arabic	7
Armenian	1
Cantonese	91
English	94
Hindi	1
Japanese	2
Korean	54
Mandarin	15
Pashto	1
Punjabi	1
Spanish	163
Tagalog	2
Vietnamese	140
TOTAL	**572**

3.2.2 Marketing

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

- Income-qualified programs (IQP) and other assistance programs (CARE, FERA, ESA, Level Pay Plan, and Medical Baseline) were featured in customers' monthly electric bill "onserts" — pre-printed newsletter-type communications — with articles providing resources to help reduce their electricity bills.
- Throughout 2018, SCE continued to reach out to potentially eligible customers to enroll them in CARE or FERA, as appropriate. Targeted direct-to-consumer mailings were sent to households on a monthly basis, leveraging advanced analytics based on previous responses to fine-tune the targeting process. In 2018, SCE sent out more than 1.6 million direct mail solicitations to potentially eligible customers.
- As part of the CARE / FERA annual solicitation process in June 2018, SCE included CARE / FERA enrollment applications in the bills of nearly 3 million customers receiving a paper bill (that is, not receiving bills online).
- SCE's Customer Contact Center continued to use the online CARE / FERA enrollment application on SCE's public website, SCE.com, to directly enroll customers into the CARE or FERA program over the phone, or offer the option to send a CARE / FERA application to the customer, as appropriate.

3.2.3 Paid Media (Advertising)

The 2018 Income Qualified Program advertising campaign employed digital banners (desktop and mobile), Search Engine Marketing (SEM) placements, social posts, and newspaper insertions. Digital media ads were placed through RhythmOne, a top-performing advertising network. The campaign generated over 108.5 million impressions targeting General Market (GM), Asian (Chinese, Korean, Vietnamese and Filipino), Hispanic, and African American audience segments.

- **Display:** Desktop display and mobile placements targeted GM, Asian, Hispanic and African American segments with a household income of less than $75,000. The desktop and mobile placements delivered over 52.6 million impressions and an overall conversion rate of 0.08%. All ethnic placements performed above the conversion rate benchmark of 0.09%, except GM, which brought the overall rate down. Display also delivered about 44,000 clicks at a click-through-rate (CTR) of 0.08% across ESAP and joint IQP (Rate Discount and ESA) flights. CTR was not a key performance indicator (KPI) for this year's campaign.
- **Search Engine Marketing:** SEM targeted Spanish and English-speaking customers throughout the SCE service territory and delivered 849,554 impressions, 58,383 clicks and a 6.87% CTR. We saw a 29.4% increase in SEM CTR performance in 2018 compared to 2017.
- **Social:** Ads were placed across Twitter, Facebook, and Instagram. Twitter garnered a 0.36% CTR overall, with GM at 0.31% CTR and Hispanic at 0.42% CTR. Facebook / Instagram delivered a 0.87% CTR overall, with the ESAP at 1.29% CTR and joint IQP at 0.81% CTR.
- **Print:** Two hundred and fifty-five (255) insertions were placed across 32 publications targeting the Hispanic, African American, and Asian (Chinese, Korean, Vietnamese) audience segments. The print campaign delivered over 44.5 million impressions.

3.2.4 General Market

The advertising campaign launched June 19 and ran through December 31, 2018. General Market media delivered a total of 36,243,587 impressions.

Digital Display Summary:

Advertising ran for joint programs (rate discount and ESAP combined):

- Joint placements delivered 18,065,020 impressions, with a Conversion rate of 0.05% and a CTR of 0.06%

Advertising ran on both Desktop and Mobile platforms:

- Desktop placements delivered 16,402,179 impressions, with a Conversion rate of 0.05% and a CTR of 0.04%, and
- Mobile placements delivered 13,650,842 impressions, with a Conversion rate

of 0.06% and a CTR of 0.09%.

3.2.5 African-American Market

The advertising campaign launched June 19 and ran through December 31, 2018. African American media delivered a total of 8,356,077 impressions.

Digital Display Summary:

Advertising ran for Joint Programs (rate discount and ESAP combined):

- Joint placements delivered 2,304,115 impressions, with a Conversion rate of 0.12% and a CTR of 0.12%.

Advertising on both Desktop and Mobile platforms:

- Desktop placements delivered 2,136,708 impressions, with a Conversion rate of 0.12% and a CTR of 0.10%, and
- Mobile placements delivered 1,765,369 impressions, with a Conversion rate of 0.13% and a CTR of 0.15%.

3.2.6 Asian Market

The advertising campaign launched June 19 and ran through December 31, 2018. Asian media delivered a total of 24,041,685 impressions.

Digital Display Summary:

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

- **Chinese** delivered 3,379,091 impressions, with a Conversion rate of 0.12% and a CTR of 0.11%
- **Vietnamese** delivered 3,111,654 impressions, with a Conversion rate of 0.12% and a CTR of 0.11%
- **Filipino** delivered 2,856,842 impressions, with a Conversion rate of 0.13% and a CTR of 0.11%, and
- **Korean** delivered 3,370,958 impressions, with a Conversion rate of 0.10% and a CTR of 0.10%.

Advertising ran on both Desktop and Mobile platforms:

- Chinese
  - Desktop placements delivered 1,836,787 impressions, with a Conversion rate of 0.11% and a CTR of 0.09%, and
  - Mobile placements delivered 1,542,304 impressions, with a Conversion rate of 0.12% and a CTR of 0.13%.
- Vietnamese
  - Desktop placements delivered 1,697,736 impressions, with a Conversion

rate of 0.11% and a CTR of 0.09%, and

- Mobile placements delivered 1,413,918 impressions, with a Conversion rate of 0.13% and a CTR of 0.13%.

- Filipino
  - Desktop placements delivered 1,555,414 impressions, with a Conversion rate of 0.12% and a CTR of 0.10%, and
  - Mobile placements delivered 1,301,428 impressions, with a Conversion rate of 0.13% and a CTR of 0.13%.
- Korean
  - Desktop placements delivered 1,837,974 impressions, with a Conversion rate of 0.09% and a CTR of 0.08%, and
  - Mobile placements delivered 1,532,984 impressions, with a Conversion rate of 0.12% and a CTR of 0.12%.

3.2.7 Hispanic Market:

The advertising campaign launched June 19 and ran through December 31, 2018. Hispanic media delivered a total of 37,204,009 impressions.

Digital Display Summary:

Advertising ran for Joint (rate discount and ESAP combined):

- Joint placements delivered 3,072,810 impressions, with a Conversion rate of 0.10% and a CTR of 0.09%.

Advertising ran on both Desktop and Mobile platforms:

- Desktop placements delivered 3,245,755 impressions, with a Conversion rate of 0.10% and CTR of 0.08%, and
- Mobile placements delivered 2,717,362 impressions, with a Conversion rate of 0.13% and a CTR of 0.14%.

3.2.8 Owned Media

In 2018, ENERGIZED by Edison (formerly InsideEdison.com) posted three stories related to our CARE and ESA programs:

- "New Income Guidelines May Help More Customers Stretch Energy Dollars" (translations in Chinese, Khmer, Korean, Spanish Vietnamese): 2,747 page views
- "Mobile Home Park Residents to Save Money, Energy in New Pilot Program:" 1,523 page views, and
- "6 Ideas for Energy-Saving Holiday Gifts" (included info on EAF): 888 page views.

3.2.9 Earned Media

In 2018, coverage of SCE's IQPs resulted in 13 earned media stories: four (4) in Asian media outlets, three (3) in Hispanic media, two (2) in African American media, and 4 in general media:

- December 14, 2018, KPCC-FM: KPCC-FM reported some SCE customers "at risk of being disconnected," including customers age 65 and older, and low-income customers who need medical assistance, can get some protections to keep their lights on.
- Sept. 15, 2018, Asian Journal (page 21 and 22), *available at* https://www.asianjournal.com/community-newspapers/los-angeles-weekend-edition-september-15-18-2018/ Summary: Coverage from the "Preparing For Emergencies In Advance Can Be A Lifesaver" story from *Inside Edison*.
- August 12, 2018, KCEL-FM and KUTY-AM SCE's Robert Villegas discussed IQPs and called them "key for customers that need assistance at this time of year when energy consumption and bills rise due to the increased energy used for air conditioning." (Ethnic/Spanish)
- June 24, 2018, KFNY-AM, Riverside, CA: Metallic Balloon Safety, IQPs, and Scams discussed in a 30-minute interview in Spanish with Edison's Robert Villegas, who elaborated on how to safely handle metallic balloons and the increased income guidelines for SCE's Income Qualified Programs. Villegas encouraged listeners to check whether they qualify under the new higher income guidelines, which was especially important for seniors and others on a fixed income. (Ethnic/Spanish)
- June 22, 2018, Simi Valley Acorn: "Low-Income Residents Can Apply for Electric Power Discount Programs." (General media)
- June 14, 2018, Siam News: "New Income Guidelines May Help More Customers Stretch Energy Dollars." Outlined an assortment of income-qualified programs that could help more SCE customers qualify for financial assistance. (Ethnic/Asian)
- June 13, 2018, Idyllwild Town Crier: "New Income Guidelines May Help More Customers Stretch Energy Dollars." Coverage of Income Qualified Programs' new guidelines for 2018-2020 and how customers may qualify for reduced utility bills, energy-efficient replacement refrigerators, and other products and services. (General market)
- June 11, 2018, Korea Daily: "New Income Guidelines May Help More Customers Stretch Energy Dollars." (Ethnic/Asian)
- June 9, 2018, Viet Bao Daily News: "New Income Guidelines May Help More Customers Stretch Energy Dollars." Coverage of Income Qualified Programs' new guidelines for 2018-2020 and how customers may qualify for reduced utility bills, energy-efficient replacement refrigerators, and other products and services. (Ethnic/Asian)

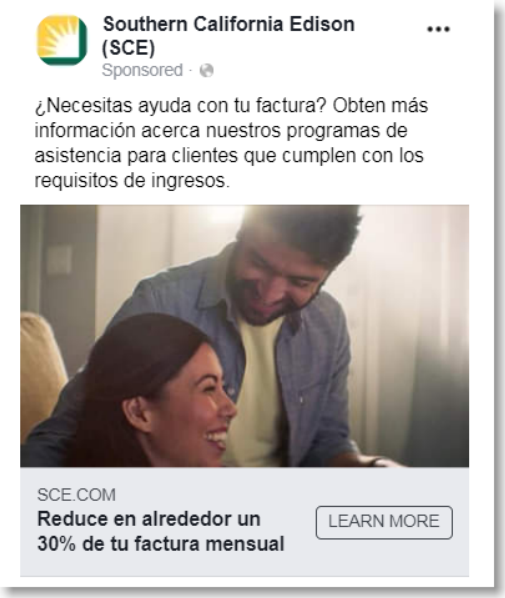
- June 9, 2018, Orange County Breeze: "New Income Guidelines May Help More Customers Stretch Energy Dollars." Coverage of Income Qualified Programs' new guidelines for 2018-2020 and how customers may qualify for reduced utility bills, energy-efficient replacement refrigerators, and other products and services. (General market)
- June 7, 2018, L.A. Sentinel: "New Income Guidelines May Help Customers Stretch Energy Dollars." Coverage of Income Qualified Programs' new guidelines for 2018-19 and how customers may qualify for reduced utility bills, energy-efficient replacement refrigerators, and other products and services. (Ethnic/African American)
- June 7, 2018, Watts Times: "New Income Guidelines May Help Customers Stretch Energy Dollars." Coverage of Income Qualified Programs' new guidelines for 2018-19 and how customers may qualify for reduced utility bills, energy-efficient replacement refrigerators, and other products and services. (Ethnic/African American)

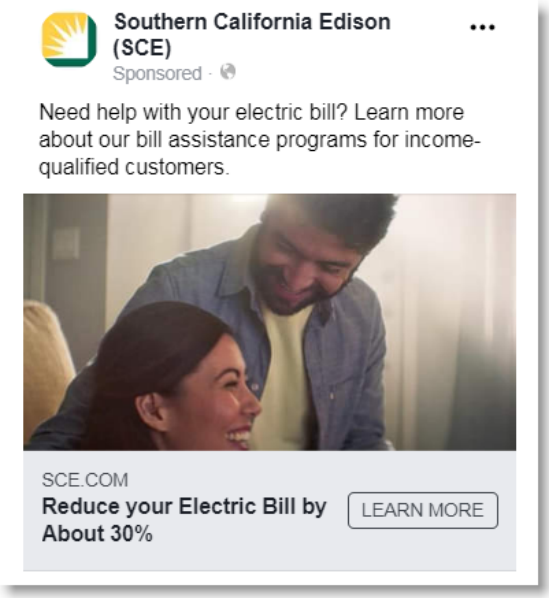
3.2.10 Social Media (Advertising)

In 2018, Income Qualified Ads were launched on social media to promote the CARE, FERA, and ESA programs:

- Customers learned about Income Qualified Programs through link updates on Facebook, Instagram, and Twitter which directed customers to the respective program website pages for more information.
- The ads were in English and Spanish and were targeted to customers with household incomes of $30,000 to $70,000. The targeted messages were in flight from June to November, 2018.
- SCE spent $67,000 on Facebook and Instagram ads and $9,000 on Twitter.
- The campaign on Facebook and Instagram generated more than 7.2 million impressions and more than 62,800 website clicks to the program landing pages (CARE/FERA and ESAP). Of these impressions, 2.6 million were from Spanish-speaking customers on Facebook.
- On Twitter, the English-language CARE/FERA ads generated more than 593,000 impressions and drove more than 1,868 people to the program landing page.
- Among Spanish-language users on Twitter, the CARE/FERA ads generated more than 356,000 impressions and sent more than 1,500 people to the program landing page.

Go on to the next page


Southern California Edison (SCE)
Sponsored
¿Necesitas ayuda con tu factura? Obten más información acerca nuestros programas de asistencia para clientes que cumplen con los requisitos de ingresos.
SCE.COM
Reduce en alrededor un 30% de tu factura mensual
LEARN MORE


Southern California Edison (SCE)
Sponsored
Need help with your electric bill? Learn more about our bill assistance programs for income-qualified customers.
SCE.COM
Reduce your Electric Bill by About 30%
LEARN MORE

Southern California Edison (SCE)
Sponsored
El Programa de Asistencia para el Ahorro de Energía cambiará tus electrodomésticos antiguos por modelos nuevos de consumo energético eficiente para los usuarios que cumplen con los requisitos de ingresos.
SCE.COM
Recibe electrodomésticos gratuitos que pueden ayudarte a ahorrar
Sign Up

Southern California Edison (SCE)
Sponsored
The Energy Savings Assistance Program will replace old, working appliances with new, energy-efficient models for income-qualified customers.
SCE.COM
Get Free Appliances that Can Help You Save
See if you qualify. Apply online today!
Sign Up

SCE
@SCE
Need help with your electric bill? Learn more about our bill assistance programs for income-qualified customers.
Reduce Your Electric Bill by About 30%
sce.com
10:21 AM - 25 Jun 2018

3.3 Discuss each of the following:

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

Both CARE and FERA are promoted through a joint rate discount application. All outreach efforts for FERA are also combined with the CARE Program. In 2018, SCE began a communication campaign targeting FERA-eligible customers and is currently evaluating the results.

SCE plans to include additional program information for FERA in the upcoming Post 2020 Low Income Application.

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

There are several factors that have created barriers to increase participation in the FERA program. Some of which include:

- Offering CARE and FERA on one enrollment form does not allow for separate and distinct marketing of each program to the intended target audiences
- Customers underreport income to receive the higher CARE 30 percent discount on their utility bills instead of the FERA 12 percent
- Customers enroll through a categorically eligible program which automatically qualifies them for CARE although they may truly qualify for the FERA program

To address some of the above barriers in Q.4 2018, SCE tested a FERA specific marketing campaign that included 10,000 customers identified through data analytics as being eligible for the FERA program. As a result, these analytics will allow SCE to improve targeting for future marketing efforts.

Starting in January 2019 per Senate Bill 1135, [10] the FERA discount will increase from 12 to 18 percent. SCE believes that the higher discount will encourage enrollment and increase participation. Additionally in December 2018, the CPUC issued D.18-11-027[11] which among many other directives set an interim FERA enrollment target of 50 percent of eligible customers by 2023. As directed in D.18-11-027, in 2019 SCE will submit a plan that outlines marketing strategies and tactics designed to cost-effectively grow FERA awareness and increase participation to meet the 50 percent enrollment targets by end 2023.

---

[10] Senate Bill (SB) 1135, approved on September 14, 2018, the legislature added Section 739.12 to the Public Utilities Code and increased the FERA discount to 18 percent, effective January 1, 2019.

[11] On December 7, 2018, CPUC issued D.18-11-027, Decision on Southern California Edison Company's Proposed Rate Designs and Related Issues.

4. Processing FERA Applications

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

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

See Table 7, below.

Table 7. FERA Self-Certification and Self-Recertification Applications[12]

2018	Provided[13]	Received	Approved	Denied[14]	Pending / Never Completed[15]	Duplicates
Utility	-	68,826	9,588	57,764	0	1,474
Capitation	-	21	0	21	0	0
Other Third-Party	-	203	5	198	0	0
Total	-	69,050	9,593	57,983	0	1,474

4.2 Processing Random Post-Enrollment Verification Requests

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

See Table 8, below.

Table 8. FERA Random Post-Enrollment Verification Requests[16, 17]

2018	Requested	Received	Approved	Denied	Pending / Never Completed [18]	Duplicates
Total	**69**	**69**	**1**	**67**	**1**	**0**

[12] Includes sub-metered tenants.

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

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

[15] Includes cancelled recertification requests and closed accounts.

[16] The verification process for FERA is the same as for CARE.

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

[18] Includes customers dropped due to non-response, cancelled requests, and closed accounts.

5. Program Management

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

No issues or events significantly affected FERA program management in 2018.