

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

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

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

Application of Southern California Gas Company (U 904-G) for Approval of Low-Income Assistance Program and Budgets for Program Years 2012-2014.

A.11-05-018  
(Filed May 16, 2011)

Application of Pacific Gas and Electric Company for Approval of the 2012-2014 Energy Savings Assistance and California Alternate Rates for Energy Programs and Budget (U 39-M)

A.11-05-019  
(Filed May 16, 2011)

Application of San Diego Gas & Electric Company (U 902-M) for Approval of Low-Income Assistance Programs and Budgets for Program Years 2012-2014

A.11-05-020  
(Filed May 16, 2011)

**MONTHLY REPORT OF SOUTHERN CALIFORNIA EDISON COMPANY (U 338-E)  
ON LOW INCOME ASSISTANCE PROGRAMS FOR SEPTEMBER 2012**

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**MONTHLY REPORT OF SOUTHERN CALIFORNIA EDISON COMPANY (U 338-E)  
ON LOW INCOME ASSISTANCE PROGRAMS FOR SEPTEMBER 2012**

Southern California Edison Company (SCE) hereby submits the attached Low Income Assistance Programs Monthly Report for September 2012. The information contained in this report supersedes all prior reports submitted by SCE.

Respectfully submitted,

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*/s/ Andrea Tozer*

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**October 22, 2012**

**Attachment**

**ESA and CARE Program Report**

**Southern California Edison Company's (SCE)**

**Energy Savings Assistance (ESA) Program**

**And**

**California Alternate Rate for Energy (CARE)**

**Program Monthly Report**

**September 2012**

# LOW INCOME ASSISTANCE PROGRAMS MONTHLY REPORT

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# LOW INCOME ASSISTANCE PROGRAMS MONTHLY REPORT

## 1. Energy Savings Assistance Program Executive Summary

### 1.1. Energy Savings Assistance (formerly referred to as Low Income Energy Efficiency or LIEE) Program Overview

1.1.1. Provide a summary of the Energy Savings Assistance Program elements as approved in Decision (D.) 12-08-044:

Program Summary for Month			
2012	Authorized / Planning Assumptions	Year-to-Date Actual	%
Budget	\$72,461,946	\$28,541,051	39%
Homes Treated	87,389	50,355	58%
kWh Saved	N/A	14,122,369	N/A
kW Demand Reduced	N/A	4,901	N/A
Therms Saved	N/A	N/A	N/A

### 1.2. Whole Neighborhood Approach Evaluation

1.2.1. Provide a summary of the geographic and customer 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).

Throughout the month of September 2012, SCE continued to promote the Energy Savings Assistance (ESA) program, California Alternate Rates for Energy (CARE) program, Cool Center program, Medical Baseline and other SCE programs through various community events within SCE’s service territory. At these events, customers interacted with SCE representatives and obtained information on the ESA program and Energy Efficiency in general.

### **1.3. Energy Savings Assistance Program Customer Outreach and Enrollment Update**

- 1.3.1. Provide a summary of the Energy Savings Assistance program outreach and enrollment strategies deployed this month.

On September 11, 2012, SCE launched an automated outbound calling campaign targeting over 7,600 customers within the city of Whittier and surrounding areas. The campaign targeted CARE-enrolled customers who have not yet participated in the ESA Program, and directed customers to stay on the line to continue through the automated questionnaire, with the option of speaking to a live phone representative. Of the 7,600 customers, 37% successfully received the automated message. Overall, the campaign received a 17% response, allowing the designated service provider to immediately schedule appointments with the interested customers.

On September 12, 2012, SCE representatives attended the Los Angeles County Service Planning Area 7 (SPA 7) Community Partnership collaborative meeting, which is made up of non-profit agencies and partners from private businesses throughout SPA 7.<sup>1</sup> They meet on a monthly basis to share resources and develop and implement short and long term objectives to provide assistance within the community. SCE representatives had an opportunity to network and share information regarding the upcoming Income-Qualified Program Community Resource Festival event scheduled for October 11, 2012

On September 19, 2012, SCE and Southern California Gas Company (SoCalGas) jointly presented the ESA, CARE, Energy Assistance Fund (EAF), and Medical Baseline programs to a group of seniors located within the Irvine Senior Center. The presentation allowed utility staff members to engage with seniors and address specific questions or concerns.

SCE continues to enroll customers through the paperless enrollment process which utilizes tablet PCs and portable scanners during the assessment process to streamline and expedite enrollments. This process complements the Whole Neighborhood Approach by reducing the program's carbon footprint and

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<sup>1</sup> The Los Angeles County Department of Public Health has divided the county into eight distinct Service Planning Areas to assist in developing and providing more relevant public health and clinical services targeted to the specific health needs of the residents in these different areas. SPA 7 serves the communities of Artesia, Bell, Bellflower, Bell Gardens, Cerritos, City of Commerce, City Terrace, Cudahy, Downey, East Los Angeles, Hawaiian Gardens, Huntington Park, La Habra Heights, Lakewood, La Mirada, Los Nietos, Maywood, Montebello, Norwalk, Pico Rivera, Santa Fe Springs, Signal Hill, South Gate, Vernon, Walnut Park, Whittier, and associated areas.



maximizing efficiencies. In September 2012, nine (9) assessors from eight (8) different service providers used the paperless enrollment process to enroll more than 818 customers.

#### **1.4. Leveraging Success Evaluation, Including CSD**

- 1.4.1. Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented? What was the result in terms of new enrollments?

For the past several years, SCE has provided refrigerators to contractors at no cost to the Low Income Home Energy Assistance Program (LIHEAP) for installation through LIHEAP. SCE believes this approach will enable contractors to utilize measures and services from both LIHEAP and the ESA program to better serve its customers. SCE continues to work with the California Department of Community Services and Development (DCSD), service contractors, and the California Public Utilities Commission (CPUC) in efforts to successfully leverage ESA program and LIHEAP services.

#### **1.5. Workforce Education & Training**

- 1.5.1. Please summarize efforts to improve and expand Energy Savings Assistance Program workforce education and training. Describe steps taken to hire and train low income workers and how such efforts differ from prior program years.

In D.07-12-051, the Commission stated that "(t)he LIEE portion of the statewide strategic plan should include specific training strategies for reaching disadvantaged communities." SCE's contractors, and particularly community-based organizations (CBOs), are situated in low income and disadvantaged communities and provide jobs within these communities. Currently, these organizations provide over 700 jobs that support SCE's ESA program, including executive, clerical and other ancillary positions.

During the 2012 program year-to-date, SCE has conducted 10 Home Assessment Training workshops, which provide training to agency outreach staff on the policies and procedures related to home assessment. As of January 2012, the revamped four-day training workshop includes comprehensive instruction on income documentation, customer and measure eligibility, and hands-on exercises that were the direct result of feedback from service providers and trainees. With this in mind, SCE has conducted 10 Home Assessment Training workshops with a total of 209 trainees receiving the updated curriculum. In addition, 30 new jobs for assessors have been created to support SCE's ESA program.

**2. California Alternate Rates for Energy (CARE) Executive Summary**

**2.1. CARE Program Summary**

2.1.1. Please provide CARE program summary costs

<b>CARE Budget Categories</b>	<b>Authorized Budget</b>	<b>Expenses Year-to-Date</b>	<b>% of Budget Spent</b>
Outreach (includes automatic enrollment)	\$2,050,000	\$1,215,762	59%
Proc., Certification & Verification	\$7,980,000	\$700,530	9%
Information Tech/Programming	\$950,000	\$271,497	29%
Pilots	\$216,000	\$168,825	78%
Measurement & Evaluation	\$90,000	\$134,436	149%
Regulatory Compliance	\$251,000	\$114,934	46%
General Administration	\$680,000	\$385,946	57%
CPUC Energy Division Staff	\$140,000	\$49,858	36%
Cooling Centers	N/A	N/A	N/A
<b>Total Expenses</b>	<b>\$12,357,000</b>	<b>\$3,041,788</b>	<b>25%</b>
<b>Subsidies and Benefits</b>	<b>\$330,200,000</b>	<b>\$262,983,717</b>	<b>80%</b>
<b>Total Program Costs &amp; Discounts</b>	<b>\$342,557,000</b>	<b>\$266,025,505</b>	<b>78%</b>

2.1.2. Please provide the CARE program penetration rate to date

<b>CARE Penetration</b>		
<b>Participants</b>	<b>Estimated Eligible Participants</b>	<b>Year-to-Date Penetration Rate</b>
1,422,955	1,455,389	98%

**2.2. Outreach**

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

SCE's Customer Communications Organization within SCE's Call Centers continues to utilize the online CARE enrollment application at [www.sce.com](http://www.sce.com) to directly enroll eligible customers in the CARE program via the telephone or by offering the option to mail a CARE application to the customer. In September

2012, there were 11,967 eligible customers enrolled in the CARE program through the Call Centers' outreach efforts.

CARE and Family Electric Rate Assistance (FERA) outreach efforts and communications to SCE's in-language and under-penetrated areas continue to be a priority. SCE's CARE and FERA programs partner with internal departments such as Equal Opportunity, Local Public Affairs (LPA), Consumer Affairs, Customer Experience Management, Corporate Communications Community Involvement, Speakers Bureau, Business Solutions, the Mobile Energy Unit (MEU), and employee volunteer-based resource groups, as well as various chambers, foundations, faith-based organizations (FBOs) and CBOs in outreach activities to target SCE's "hard-to-reach" customer base.

In September 2012, SCE's CARE/FERA programs had a presence at 28 outreach events (see table below) wherein CARE applications were distributed to potentially eligible customers throughout SCE's service area. At many of these events, eligible customers had the opportunity to immediately enroll or recertify for CARE via the real time online enrollment form at [www.sce.com](http://www.sce.com). Such events provide SCE with the opportunity to uphold a presence in the community, continue to educate the public about the programs, and enroll eligible customers.

Event Name	Location	Event Date	Estimated # of Customers SCE Interacted With	Event Description
Los Angeles County Fair	Pomona	8/31-9/29/2012	7,471	SCE hosted a booth promoting CARE/FERA/ESA Programs
LA County Senior & Community Services	East Los Angeles	9/6/2012	40	Presented Information on Safety, IQP and Medical Baseline to Seniors and Center's Staff.
Free Food Distribution Day	La Puente	9/7/2012	100	SCE hosted a booth promoting CARE/FERA/ESA Programs

Event Name	Location	Event Date	Estimated # of Customers SCE Interacted With	Event Description
Tulare County Fair	Tulare	9/12-16/2012	958	SCE hosted a booth promoting CARE/FERA/ESA Programs
City of Highland Senior Center	Highland	9/12/2012	20	Presented Information on Safety, IQP and Medical Baseline to Seniors and Center's Staff.
SPA 7 Community Partnership Meeting	Los Angeles	9/12/2012	65	Presented Information on Safety, IQP and Medical Baseline
Adelanto Community Forum	Adelanto	9/14/2012	150	Presented Information on IQP Programs
Senior Center	Barstow	9/14/2012	40	Speakers Bureau presented information on IQP Programs
SCE Lamp Exchange	Long Beach	9/15/2012	250	SCE hosted a booth promoting CARE/FERA/ESA Programs
Green Expo	Huntington Beach	9/15/2012	320	SCE hosted a booth promoting CARE/FERA/ESA Programs

Event Name	Location	Event Date	Estimated # of Customers SCE Interacted With	Event Description
Family Festival	Rialto	9/15/2012	35	SCE hosted a booth promoting CARE/FERA/ESA Programs
Disability Resources Expo	Ontario	9/15/2012	800	Presented Information on Safety, IQP and Medical Baseline
Hesperia Days	Hesperia	9/15-16/2012	240	SCE hosted a booth promoting CARE/FERA/ESA Programs
Fiestas Patrias	Santa Ana	9/15-16/2012	632	SCE hosted a booth promoting CARE/FERA/ESA Programs
American Red Cross PrepareSoCal Emergency Preparedness Class	Murrieta	9/16/2012	100	Speakers Bureau presented information on IQP Programs
Senior Health Fair	Cathedral City	9/18/2012	200	SCE hosted a booth promoting CARE/FERA/ESA Programs
American Red Cross PrepareSoCal Emergency Preparedness Class	Riverside	9/22/2012	300	Speakers Bureau presented information on IQP Programs

Event Name	Location	Event Date	Estimated # of Customers SCE Interacted With	Event Description
SCE Lamp Exchange	Diamond Bar	9/22/2012	500	SCE hosted a booth promoting CARE/FERA/ESA Programs
6th Annual Community Resource Fair	East Rancho Dominguez	9/22/2012	300	Speakers Bureau presented information on IQP Programs
YMCA Health Fair for Seniors	Montebello	9/22/2012	200	Speakers Bureau presented information on IQP Programs
2nd Annual Agricultural Festival	San Jacinto	9/22/2012	105	SCE hosted a booth promoting CARE/FERA/ESA Programs
Home Show	Visalia	9/22-23/2012	103	SCE hosted a booth promoting CARE/FERA/ESA Programs
1st Annual Senior Services Day (LGBT)	Palm Springs	9/25/2012	50	SCE hosted a booth promoting CARE/FERA/ESA Programs
Fall Business Showcase	Tehachapi	9/26/2012	25	SCE hosted a booth promoting CARE/FERA/ESA Programs

Event Name	Location	Event Date	Estimated # of Customers SCE Interacted With	Event Description
Woodlake Community Showcase	Woodlake	9/28/2012	269	SCE hosted a booth promoting CARE/FERA/ESA Programs
City of Rancho Cucamonga Senior Health Fair	Rancho Cucamonga	9/28/2012	250	Presented Information on Safety, IQP and Medical Baseline
Living Green Expo	Simi Valley	9/29/2012	98	SCE hosted a booth promoting CARE/FERA/ESA Programs
Global Village Event	Irvine	9/29/2012	300	SCE hosted a booth promoting CARE/FERA/ESA Programs

On September 14, 2012, CARE Program Management participated in the “Helping Our Communities Succeed and Strengthening Our Nonprofit Sector” Forum in Tulare. The purpose was to create, renew and strengthen relationships through networking and ongoing relationships between SCE and nonprofits working with low income customers and underserved communities. SCE’s CARE Program Management presented and described the CARE, FERA, ESA, and EAF programs along with potential contracting opportunities for these organizations through the Capitation Fee program.

The CARE/FERA Capitation Fee Project team is continuing its efforts to re-engage existing Capitation agencies while strategically registering additional agencies to assist in overcoming enrollment barriers such as language, cultural, and special needs as a means of enrolling the hardest-to-reach customers. Due to these efforts, the Capitation Fee Project continues to show increased enrollments from agencies that had been previously inactive. In September 2012, Capitation contractors enrolled 187 new eligible customers in the CARE program.

In support of SCE's continued initiative to enroll hard-to-reach eligible customers, the Capitation Fee Program enrolled Clinica Sierra Vista as a new capitation agency. In addition, SCE re-engaged the Council on Aging, Orange County as a capitation agency:

Current campaign strategies and efforts include the following:

- Leverage sponsored community events to reach potential eligible populations for CARE or FERA enrollment, including food distributions and cultural celebrations;
- Partner with SCE personnel in other internal departments to leverage existing SCE partnerships with FBOs, CBOs and local governments; and
- Leverage existing channels to develop creative approaches for contractors to conduct CARE/FERA outreach, including food and clothing distribution events, employment information workshops, farmers' markets, faith and community based publications, school events, and community fairs.

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

SCE also enrolls new CARE customers through the EAF program, which provides utility payment assistance through voluntary customer and employee donations.

CARE enrollment is coordinated with other low income programs such as SoCalGas low income programs, LIHEAP and SCE's ESA and EAF programs. ESA program measure recipients are automatically enrolled in CARE each month, and LIHEAP payment recipients are automatically enrolled in CARE on a quarterly basis. In September 2012, there were 2,910 eligible customers enrolled in the CARE program as a result of data sharing with SoCalGas, LIHEAP, and SCE's ESA and EAF programs.

The CARE program continuously integrates its efforts and messaging with the ESA program at all outreach events, communications, and marketing campaigns.

The 2012 Cool Center Program launched on June 1, 2012. The purpose of the Cool Centers is to provide low income, senior, and disabled customers an alternative to running their residential refrigerated air conditioning system by providing a safe, cool place where they can gather during the hot summer months. Cool Centers also provide a place for customers to learn about available low income programs such as CARE, FERA and ESA, and energy



conservation practices as well as other available community programs. The Cool Centers are located in the hottest climate zones of SCE's service territory which include the counties of: Tulare, San Bernardino, Riverside, Los Angeles and Kern. The Cool Center program runs from June 1 to October 15, 2012, pending funding from the CPUC.

### **2.3. Recertification Complaints**

SCE received four (4) recertification complaints in September 2012.

- A customer called the CPUC regarding a recertification issue. The customer stated he has been trying to recertify since October, 2011. The Consumer Affairs Department contacted SCE's CARE desk for information on this issue and, after investigation, it was discovered that the customer had not returned all of the required paperwork. Apparently, he had only been sending SCE the cover sheet. The entire recertification documentation was finally received by SCE in July, 2012. The account has been rebilled with the CARE rate retroactive to July 2012 only. The deposit request following the customer's August disconnection has been waived.
- A customer called the CPUC regarding removal of his CARE discount. SCE determined the customer had been removed from the CARE rate because SCE had not received a response to its recertification request. The Consumer Affairs Department asked the customer to fax the required documentation and SCE would expedite the recertification. The documentation was received and the customer's latest statement was rebilled with the CARE discount.
- A customer wrote to SCE complaining that his CARE discount had been removed from his account. SCE discovered that the customer had not returned all of the required documentation, but had returned only the cover sheet. The Consumer Affairs Department contacted the customer and explained which documentation was required. The customer sent SCE the required documentation and the account was put back on the CARE rate five (5) days later.
- A customer called the CPUC to protest the required documentation for CARE recertification. The customer stated he had only a tax return "transcript" and the copy of the full tax return would cost him \$58. The customer stated SoCalGas had approved the discount with only the transcript. The CARE desk contacted SoCalGas and confirmed the customer's statement, and the account was placed back on CARE retroactively to the date removed.

## Appendix A: Energy Savings Assistance Program and CARE Tables

<b>Program</b>	<b>Table</b>	<b>Title</b>
Energy Savings Assistance Program	Table 1	Energy Savings Assistance Program Expenses
Energy Savings Assistance Program	Table 2	Expenses and Energy Savings by Measures Installed
Energy Savings Assistance Program	Table 3	Average Bill Savings per Treated Home
Energy Savings Assistance Program	Table 4	Homes Treated
Energy Savings Assistance Program	Table 5	Customer Summary
Energy Savings Assistance Program	Table 6	Expenditures for Pilots and Studies
Energy Savings Assistance Program	Table 7	Whole Neighborhood Approach
CARE	Table 1	CARE Program Expenses
CARE	Table 2	CARE Enrollment, Recertification, Attrition, and Penetration
CARE	Table 3	CARE Standard Random Verification Results
CARE	Table 4	CARE Self-Certification and Re-Certification Applications
CARE	Table 5	Enrollment by County
CARE	Table 6	Recertification Results
CARE	Table 7	Capitation Contractors
CARE	Table 8	Participants as of Month End