

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

Application of Pacific Gas and Electric
Company for Approval of Energy Savings
Assistance and California Alternate Rates
for Energy Programs and Budgets for
2021-2026 Program Years. (U39M).

And Related Matters.

Application 19-11-003

Application 19-11-004

Application 19-11-005

Application 19-11-006

Application 19-11-007

**MONTHLY REPORT OF SOUTHERN CALIFORNIA EDISON COMPANY (U 338-E)
ON LOW INCOME ASSISTANCE PROGRAMS FOR JUNE 2022**

ANNA VALDBERG
DAVID A. GOMEZ

Attorney for
SOUTHERN CALIFORNIA EDISON COMPANY

2244 Walnut Grove Avenue
Post Office Box 800
Rosemead, California 91770
Telephone: (626) 302-7903
E-mail: David.Gomez@sce.com

Dated: July 21, 2022

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

Application of Pacific Gas and Electric
Company for Approval of Energy Savings
Assistance and California Alternate Rates
for Energy Programs and Budgets for
2021-2026 Program Years. (U39M).

Application 19-11-003

And Related Matters.

Application 19-11-004

Application 19-11-005

Application 19-11-006

Application 19-11-007

**MONTHLY REPORT OF SOUTHERN CALIFORNIA EDISON COMPANY (U 338-E)
ON LOW INCOME ASSISTANCE PROGRAMS FOR JUNE 2022**

Pursuant to Decision (D.) 21-06-015, Southern California Edison Company (SCE) hereby submits the attached monthly status report on its Family Electric Rate Assistance (FERA) Program, Energy Savings Assistance (ESA) and California Alternate Rate for Energy (CARE) program efforts. This report represents year-to-date ESA and CARE program results and expenditures through June 2022, and includes SCE's report on intensified ESA activity in the Aliso Canyon impacted area pursuant to D.16-04-040.

Respectfully submitted,

ANNA VALDBERG
DAVID A. GOMEZ

/s/ David A. Gomez

By: David A. Gomez

Attorney for
SOUTHERN CALIFORNIA EDISON COMPANY

2244 Walnut Grove Avenue
Post Office Box 800
Rosemead, California 91770
Telephone: (626) 302-7903
E-mail: David.Gomez@sce.com

Dated: July 21, 2022

Attachment

FERA, ESA and CARE Program Report



Southern California Edison Company

Energy Savings Assistance (ESA) Program,

California Alternate Rates for Energy (CARE)

Program,

and

Family Electric Rate Assistance (FERA) Program

July 21, 2022

TABLE OF CONTENTS

1.	ESA PROGRAM EXECUTIVE SUMMARY	1
1.1.	<i>ESA Program Overview</i>	<i>1</i>
1.2.	<i>ESA Program Customer Outreach and Enrollment Update</i>	<i>5</i>
1.3.	<i>Workforce Education & Training (WE&T).....</i>	<i>12</i>
1.4.	<i>Studies and Pilots.....</i>	<i>13</i>
2.	CARE EXECUTIVE SUMMARY	15
2.1.	<i>CARE Program Summary</i>	<i>15</i>
2.2.	<i>Outreach</i>	<i>16</i>
2.3.	<i>CARE Recertification Complaints.....</i>	<i>24</i>
2.4.	<i>Miscellaneous</i>	<i>25</i>
2.5.	<i>Pilots and Studies.....</i>	<i>26</i>
3.	FERA EXECUTIVE SUMMARY	28
3.1.	<i>FERA Program Summary</i>	<i>28</i>
3.2.	<i>Outreach</i>	<i>29</i>
3.3.	<i>FERA Recertification Complaints.....</i>	<i>32</i>
3.4.	<i>Pilots and Studies.....</i>	<i>32</i>
4.	APPENDIX A – ESA, CARE, and fera PROGRAM TABLES.....	33

ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

This monthly report complies with the low-income reporting requirements established in Decisions (D.)16-11-022 and D.17-12-009, and with all reporting and program evaluation requirements established for the California Alternate Rates for Energy (CARE) and Energy Savings Assistance (ESA) Programs. For the 2022 program year, this report also complies with D.21-06-015 which authorized budgets and goals for program years 2021–2026 effective July 1, 2021.¹ Starting in 2022, the statewide electric investor-owned utilities (IOUs) are including monthly FERA updates regarding expenditures, penetration rates, and outreach in compliance with D.21-06-015.² It provides information on CARE and ESA Program accomplishments and expenditures in 2022 up to and including June 30, 2022.

1. ESA PROGRAM EXECUTIVE SUMMARY

1.1. ESA Program Overview

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 several 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. These customers may be homeowners or 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.

¹ D. 21-06-015 at 472, Ordering Paragraph (OP) 3, and at 490-491, OP 82.

² *Ibid.*

1.1.1. Provide a summary of the ESA Program elements as approved in Decision (D.) 21-06-015.

ESA (SF, MH, MF In-Unit) Program Summary Expenses for 2022			
	2022 Authorized / Planning Assumptions³	Actual to Date	%
Budget	\$63,665,148	\$34,141,915	54%
Homes Treated	27,051	32,014	118%
kWh Saved	18,788,420	13,754,615	73%
kW Demand Reduced	7,147	2,085	29%
Therms Saved	N/A	N/A	N/A
GHG Emissions Reduced (Tons)	N/A	N/A	N/A

Provide narrative summary of ESA Program for SF, MH, and MF in-unit:

In 2022, SCE’s ESA Program will continue to serve single-family, mobile home and multifamily in-unit residential customers. Beginning in 2023, SCE’s ESA Core Program will directly serve only single-family and mobile homes, as the in-unit treatment will transition under the Southern Multi-Family Whole Building (MFWB) Program. The following table tracks the actual-to-date expenses for the ESA MF CAM program compared to the annual budget assumption and the actual-to-date kWh saved.

ESA MF CAM Program Summary Expenses for 2022			
	2022 Authorized / Planning Assumptions	Actual to Date	%
Budget	\$1,800,000	\$966,659	54%
Properties Treated	N/A	26	N/A
kWh Saved	N/A	1,675,660	N/A
kW Demand Reduced	N/A	10.28	N/A
Therms Saved	N/A	N/A	N/A

³ Footnotes 1 and 2 of Table 5 and 6 of Attachment 1 of (D.) 21-06-015 state: The approved “annual energy savings goals” for program years (PY) 2022 to 2026 are for the entire ESA Program portfolio, including ESA Core Program, Multifamily (MF) in-unit [2022]; Multifamily Common Area Measures (MF CAM) [2022], and Multifamily Whole Building (MFWB) [2023 to 2026], except for the ESA Pilot Plus / Pilot Deep. The “household treatment” targets for PY 2022 to 2026 are for the entire ESA Portfolio, including ESA Core Program, MF in-unit [2022], and MF CAM [2022], with the exceptions of the MFWB and ESA Pilot Plus / Pilot Deep.

Provide narrative summary of ESA Program MF CAM:

For 2022, SCE has been authorized to spend \$1,800,000 for MF CAM. SCE is currently working on 36 projects. The budget has been allocated for these projects, and SCE has moved to a reservation process for any new MF CAM projects. As projects are completed and if there is a budget remaining, SCE will approve new MF CAM projects to commence. SCE plans to continue running MF CAM until the Southern Multifamily Whole Building (MFWB) Program is open to participation in 2023.

See the following table for more information on SCE's MF CAM activity:

Sign Date from 1/1/2019 to 6/30/2022

Deed Restricted - In Progress						
Whole Building			Common Area Only	In-Unit Only		
# Projects In Progress	# of Authorized Units		# Projects In Progress	# Projects In Progress	# of Authorized Units	
30	4854		0	6	595	
Deed Restricted - Completed						
Whole Building			Common Area Only	In-Unit Only		
# Projects Complete	# of Authorized Units	# of Units Served	# Projects Complete	# Projects Complete	# of Authorized Units	# of Units Served
30	2825	868	24	22	1723	463
Market Rate - In Progress						
Whole Building			Common Area Only	In-Unit Only		
# Projects In Progress	# of Authorized Units		# Projects In Progress	# Projects In Progress	# of Authorized Units	
0	0		0	1	32	
Market Rate - Completed						
Whole Building			Common Area Only	In-Unit Only		
# Projects Complete	# of Authorized Units	# of Units Served	# Projects Complete	# Projects Complete	# of Authorized Units	# of Units Served
0	0	0	0	31	1668	566

ESA Pilot Plus and Pilot Deep Summary Expenses for (Year)			
	2022 Authorized / Planning Assumptions	Actual to Date	%
Budget	\$3,884,864	0	0%
Homes Treated	0	0	0%
kWh Saved	0	0	0%
kW Demand Reduced	0	0	0%
Therms Saved	N/A	N/A	N/A
GHG Emissions Reduced (Tons)	0	0	0%

Provide narrative summary of ESA Program Pilot Plus and Pilot Deep:

ESA Program Pilot Plus and Pilot Deep is a joint pilot program with SCE and Southern California Gas Company (SoCalGas), where pre-selected customers may opt in to participate. Participants in Pilot Plus/Deep will receive measures that may help them save 5% to 50% of their energy usage. Pilot Plus/Deep is only for single-family homes. SCE and SoCalGas are currently conducting competitive solicitations to select a single third-party Program Implementer to deliver PP/PD gas and electric program services. SCE and SoCalGas released the RFP on February 1, 2022, held the bid conference on February 8, 2022, and proposals were due from bidders on March 9, 2022. SCE expects to issue a contract with the successful bidder in Q3 2022 with the Pilot expected to be open to participation in November 2022.

ESA Building Electrification Pilots Summary Expenses for (Year, if applicable)			
	2022 Authorized / Planning Assumptions	Actual to Date	%
Budget	\$4,068,483	\$7,791	0.2%
Homes Treated	0	0	0%
kWh Saved	0	0	0%
kW Demand Reduced	0	0	0%
Therms Saved	N/A	N/A	N/A
GHG Emissions Reduced (Tons)	0	0	0%

Provide narrative summary of ESA Building Electrification Pilots (if applicable):

The ESA Building Electrification (BE) Pilot is for ESA Program customers who may be eligible for electrification measures. BE retrofits primarily consist of space and water heating to reduce the overall energy operating costs and GHG emissions of customers currently using natural gas or propane to support some of their energy needs. This BE Pilot is only for single-family homes located in disadvantaged communities (DACs). SCE is finalizing the contract for the 3rd party selected to implement the BE Pilot and is expected to be open for participation in Q4 2022. SCE is currently in negotiations with the research consultant who will evaluate the BE Pilot. The evaluation consultant is expected to be on board Q3 2022 prior to initial implementation to facilitate an embedded evaluation.

The ESA Clean Energy Homes (CEH) Pilot will provide incentives to low-income housing developers to incorporate innovative low-carbon technologies and building practices in the designs of residential new construction buildings that will reduce energy bills for tenants. The pilot supports the state's ambitious greenhouse (GHG) reduction goals and strives to bring environmental equity to vulnerable customers. SCE is finalizing the contract for the 3rd party selected to implement CEH and is expected to be open to participation in Q4 2022. The evaluation consultant is expected to be on board Q3 2022 prior to initial implementation to facilitate an embedded evaluation.

1.1.2 Program Measure Changes

Decision 21-06-015 allows the utilities, in consultation with the statewide ESA Program Working Group, to update the measure mix through the ESA Program monthly report.⁴ There are no measure changes that have taken place this month.

1.2. ESA Program Customer Outreach and Enrollment Update

SCE's outreach efforts in conjunction with the ESA program contractors use numerous channels and innovative approaches to inform and enroll customers. The following section describes some of the methods SCE implements monthly to enroll customers and conduct outreach activities that inform customers about the ESA program.

⁴ D.21-06-015 at 486, OP 69.

1.2.1. Provide a summary of the ESA Program outreach and enrollment strategies deployed this month.

SCE's ESA Service Providers continue to enroll customers through tablet PCs (also known as paperless enrollment) during the assessment process, which results in streamlined and expedited enrollments. Using tablet PCs eliminates the need for paper copies, ensures the protection of customer data, and helps protect the environment.

Continuing through the COVID-19 pandemic, in June there were 388 Program Representatives for 23 Service Providers. These representatives used the paperless enrollment process to enroll 6836 households.

ESA Main (SF, MH, and MF In-Unit) Program Contractor Outreach

SCE continued to partner with community-based organizations (CBOs), faith-based organizations (FBOs), and private-sector service providers to assess homes and deliver ESA Program services in local communities for the ESA Main program. The ESA program suspended contractor outreach (canvassing) to control leads and the program budget during this transition year. In June, the ESA program continued to suspend the direct targeting marketing campaigns such as direct mail and email. The suspension of these campaigns is an additional effort to control leads due to program ramp-down activities. ESA contractors are continuing to enroll customers in various ways, including SCE-generated leads.

SCE continues to offer a virtual ESA enrollment option for customers. Enrollment measures are delivered or dropped off through contactless delivery. ESA contractors also continue to adhere to state guidelines regarding COVID-19 safety protocols. In June, ESA contractors enrolled approximately 270 customers via the virtual enrollment option.

Specific ESA Programs marketing, education and outreach efforts are discussed in **Section 1.2.2**, below.

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

Outreach activities have been suspended since SCE has moved to a reservation process for MF CAM.

ESA Pilot Plus and Pilot Deep

Competitive solicitations are currently in progress. No activities to report until program is open to participation in Q4 2022.

ESA Building Electrification Pilots (if applicable)

Competitive solicitations are currently in progress. No activities to report until Pilot is open to participation, tentatively, in Q4 2022.

Language Line

SCE continues using Focus International to provide real-time language translations services. These services enable Enrollment and Outreach, Installation, and Inspections field personnel to overcome language barriers while completing their relative task(s). Various languages are available for translation, including American Sign Language (ASL). The following table denotes the number of calls made in the languages used in translation.

Language	Number of Calls
Vietnamese	9
Mandarin	4
Spanish	1
Korean	1

Tribal Outreach

No activities to report in June.

The following table shows a current list of the thirteen (13) tribes identified in SCE's service territory and the status of our efforts:

Tribal Nations in SCE's Territory: Outreach Status	Treated	Refused/ Ineligible	No longer served by SCE	In progress
Timbisha Shoshone	X			
Chemehuevi	X			
San Manuel Band of Mission Indians		X		
Agua Caliente Band of Cahuilla Indians		X		
Twenty-Nine Palms Band of Mission Indians		X		
Pechanga			X	
Benton Paiute				X
Bishop Paiute				X
Bridgeport Indian Colony				X
CRIT		X		
Morongo				X
Soboba				X
Tule River				X

1.2.2. Customer Assistance Marketing, Education and Outreach for the CARE/FERA and ESA Programs.

Refer to *Section 2.2* for CARE/FERA Marketing, Education & Outreach.

General Awareness Marketing

Online Advertising

In the month of June, no online advertising was conducted by the ESA Program.

Social Media

In the month of June, no social media was available through the ESA Program.

Direct Marketing

Direct SCE marketing efforts for this reporting month included the following tactics:

- **Email** — The ESA Program did not conduct any email campaigns in the month of June.

- **Direct Mail** — The ESA Program did not conduct any direct mail campaigns in the month of June.
- **SCE.com Website** — The ESA Program webpage (www.sce.com/esap) provides information on program eligibility and services. This messaging continues to direct customers to this page and allows them to apply for the ESA program directly online. In the month of June, SCE received about 1,100 ESA-related internet leads.

An illustration of the ESA webpage is shown below:

- **Outbound Calls** — SCE is focused on generating leads for its contractors from recent CARE participants who have never participated in the ESA program. In June, SCE provided approximately 12,500 CARE leads to ESA contractors. The ESA Program refers these new CARE customers to SCE's contractors as leads to enroll these households into the ESA Program and provide energy-saving services. SCE continued to leverage CARE's High Usage customers whose usage was identified as exceeding 400% to 600% (or more) above the baseline. In June, the ESA Program referred approximately 150 of these customers to SCE's contractors as leads to enroll these households into the ESA Program and provide energy-saving services.

ESA contractors can use these leads to build their pipeline for customer enrollments, whether the customers prefer to enroll through the virtual program or a face-to-face appointment.

- **Inbound Calls** — Customers who call SCE’s customer service center are informed of and referred to the ESA Program. Customers are assigned to a contractor in their service territory. The ESA contractor will then follow up on the lead and contact the customer to assess eligibility and enrollment in the ESA Program.

However, the ESA program will move to a waitlist for interested customers for the remaining months in 2022 due to program ramp-down activities and the limited budget. When customers call SCE’s customer service center, they will be informed that participation in the ESA program is currently waitlisted due to limited funding. Interested customers may provide their information and they may be contacted for enrollment and assessment scheduling should funding become available. In the month of June, SCE received approximately 1,500 ESA related calls from interested customers that were placed on the waitlist. As funding allowed in the month of June, about 500 waitlist leads were assigned to a contractor to follow up on the lead and contact the customer to assess eligibility and enrollment in the ESA Program.

- **Live CARE Call Campaign** — SCE has been meeting with the other statewide IOUs to simultaneously conduct a coordinated six-month outbound call pilot for “attempted but failed” Post-Enrollment Verification (PEV) households. These meetings have allowed the IOUs to discuss operational workflows and reporting requirements. The Outbound PEV Pilot launched on June 1st.

Community Outreach & Engagement

ESA Program contractors participate in a variety of community events to interact with customers and inform them about the ESA program and other low-income programs available to them. These events help increase ESA enrollments, and ESA contractors will also assist customers in completing the enrollment process during the events. The ESA Program and its contractors did not attend any in-person events in the month of June.

SCE’s Income Qualified Programs (IQP) and Foodservice Technology Center (FTC)⁵ groups are continuing to partner with the West San Gabriel Valley Boys and Girls Club to which SCE had provided over 1000 meals to prevent food waste and help families who are experiencing food scarcity. In addition to providing meals, IQP informational flyers were provided to potential income-qualified program participants.

CBO Activities

⁵ FTC conducts energy-efficiency studies and demonstrations related to commercial foodservice equipment and technologies for restaurants and foodservice facilities.

Refer to CARE *Sections 2.2.1* and *2.2.2*.

Multicultural Outreach

No activity this month.

Other Customer Engagement Efforts

No activity this month.

1.2.3. Managing Energy Use

SCE's contractors' Program Representatives continue to review the ESA Program Customer Energy Education and Resource Guide with each program enrollee at the time of in-home or virtual enrollment. This Energy Education focuses on no-cost actions that low-income customers can take to save energy and reduce their bills. Included in this education is instruction on how to sign up for My Account, which provides them with additional time- and money-saving tools and opportunities to participate in residential energy efficiency rebate programs. ESA Program Representatives also encourage customers to visit the Home Energy Advisor on sce.com, which is a free online survey that provides customers with customized savings recommendations.

1.2.4. Services to Reduce Energy Bill

The ESA program training and energy education materials were updated to include information on new programs such as the Arrearage Management Plan (AMP) and other assistance programs. Updated assistance program brochures have been made available to ESA contractors to utilize in their enrollment activities. ESA contractors encourage customers to visit <https://www.sce.com/residential/assistance> to learn about all the programs that SCE has available to assist them with most financial obstacles they may be facing. ESA contractors act as a communication channel to customers, informing them of the benefits and resources available through SCE, state, and local programs.

1.2.5. Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented? What were the results in terms of new enrollments?

Currently, SCE does not have any projects to leverage with the California Department of Community Services & Development (CSD). Even with changes in measure eligibility and feasibility, no projects have been identified for reimbursement.

1.3. Workforce Education & Training (WE&T)

1.3.1. 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.

SCE contracts with various local private contractors (LPCs), community-based organizations (CBOs) and faith-based organizations (FBOs) to provide ESA program services. Many of the organizations are located in low-income and disadvantaged communities.

In June 2022, approximately 804 individuals from these organizations are working in support of SCE's ESA Program, including three (3) new individuals.

As of June 30, 2022, SCE has approximately 142 active Program Representatives supporting virtual (not in-person) enrollment and assessment activities.

The CBT Learning System (CBT L/S) continues to remain available for ESA Program Service Providers and their respective staff to take free online training. There are 65 courses currently available in both English and Spanish.

In June 2022, there were approximately 313 users of the system. A total of 90 courses were completed, accounting for approximately 62.37 hours of learning.

1.4. Studies and Pilots

1.4.1. ESA Program Studies

2022 Low Income Needs Assessment (LINA) Study

The statewide Low Income Needs Assessment is a statewide study project-managed by SCE. The contractor hired to conduct the study is Evergreen Economics. The objective of the 2022 Needs Assessment is to better understand the needs of low-income renters. The research plan was vetted with stakeholders and finalized in March 2021. A market characterization was conducted based on current data collected by the Residential Appliance Saturation Survey (RASS) and census data. Interviews with CBOs and contractors were conducted, the data collection sampling plan was finalized, and data collection instruments have been developed. Study focus has been on completing surveys with 1200 income-qualified renters living in both single-family and multifamily housing. The consultant is finalizing interview guides which will be used during in-depth interviews with customers (tenants) and plans to conduct those interviews in the next few months. The project is on track to be completed in December 2022.

ESA/CARE Categorical Study

The statewide Categorical Study will examine the relative alignment of the means-tested programs currently used as proxies for low income to enable enrollment in ESA, CARE and FERA. The study will also examine other programs and the potential of the programs to facilitate automatic enrollment in the income qualified programs. SDG&E is the contract manager for the study. During January and February of 2022, the scope of work was discussed and vetted with the study working group. The work scope has been finalized and the Request for Proposals (RFP) were released to potential bidders. The proposal review process completed in April 2022. A consultant was selected and onboarded in May 2022. The study has commenced and is expected to be completed by December 2022.

ESA Multifamily CAM Process Evaluation

The ESA MF CAM Process Evaluation is a statewide evaluation contract managed by PG&E. The study commenced in July 2021 and is being conducted by Resource Innovations, Inc. The objectives of the study include: (1) assess the relative effectiveness of the IOU's MF CAM outreach and implementation strategies; (2) identify what data currently exists and may be needed to facilitate a reliable evaluation of program impacts; and (3) inform future program designs targeting the low-income MF customer segment. The research plan was finalized following input received after the public workshop conducted during September

2021. Program materials have been reviewed, and process flow diagrams, logic models, and an interim memo have been developed. In February 2022, a second public workshop was conducted to solicit stakeholder feedback on the interim memo. The consultant developed and mailed surveys for tenants and property managers / owners associated with the treated properties. The study is expected to be completed in September 2022.

1.4.2. ESA BE Program Pilots

ESA Pilot Plus and Pilot Deep

Competitive Solicitations currently in progress. No activities to report until program is open to participation in Q4 2022.

ESA Building Electrification (BE) Pilot

Competitive Solicitations currently in progress. No activities to report until program is open to participation in Q4 2022.

ESA Clean Energy Homes (CEH) Pilot

Competitive Solicitations currently in progress. No activities to report until program is open to participation in Q4 2022.

2. CARE EXECUTIVE SUMMARY

The CARE program is a low-income energy rate program that provides a monthly discount to qualifying households in SCE's service territory. To qualify for CARE, household income must be at or below the 200% Federal Poverty Guidelines. Through CARE, customers can save 30%-35% a month on their electric bill. Income-qualified customers include residential single-family households, customers in sub-metered residential facilities, nonprofit group living facilities, agricultural employee housing facilities, and migrant housing farm workers.

Regarding SCE's current Disproportionate Stratified Random Sampling (DSRS) modeling approach, the Income Qualified Program (IQP) will continue to use the DSRS framework to capture more of those customers who are more likely to fail the CARE and FERA eligibility verification. Due to this, IQP shall sample a greater share of customers residing in "high-income" areas as well as those who have been enrolled in either program for only a short period of time. More specifically, customers living in areas where the proportion of households with incomes that are 200% of the Federal Poverty Level (FPL) and below is lower than the overall median level of this measure for the entire low-income population will be oversampled 1.5 times relative to customers who reside in areas where the proportion of households with incomes of 200% FPL and below is at or above the median of the same poverty measure. Additionally, customers who have been enrolled in either CARE or FERA for two years or less will also be oversampled 1.5 times relative to customers who have been with either low-income program for more than two years.

2.1. CARE Program Summary

2.1.1. Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget	Expenses Year-to-Date	% of 2022 Budget Spent
Outreach	\$3,724,630	\$2,127,643	57%
Processing / Certification Re-certification	\$1,530,979	\$364,621	24%
Post Enrollment Verification	\$483,467	\$388,699	80%
IT Programming	\$570,000	\$18,818	3%
Pilots	\$-	\$-	0%
CHANGES Program	\$525,000	\$177,830	34%
Studies	\$36,000	\$37,444	104%
Regulatory Compliance	\$478,809	\$175,946	37%
General Administration	\$1,337,746	\$603,615	45%
CPUC Energy Division	\$135,625	\$67,982	50%
Total Expenses	\$8,822,256	\$3,962,598	45%
Subsidies and Benefits	\$404,343,437	\$276,105,887	68%
Total Program Costs & Discounts	\$413,165,693	\$280,068,486	68%

2.1.2. Provide the CARE Program enrollment rate to date.

CARE Enrollment		
Participants Enrolled	Eligible Participants ⁶	Enrollment Rate
1,219,937	1,276,922	96%

2.2. Outreach

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

The CARE and Family Electric Rate Assistance (FERA) outreach efforts and communications to SCE's in-language and underpenetrated areas continue to be a priority. SCE's CARE/FERA programs partner with internal departments such as Local Public Affairs (LPA), Consumer Affairs, Marketing, Corporate Communications, Strategic Engagement, and Business Solutions. SCE also conducts external outreach efforts with various chambers, foundations, faith-based and community-based organizations in different activities that target SCE's hard-to-reach customer base.

SCE continues to provide all customers who contact SCE's Customer Contact Center (CCC) to request payment arrangements the opportunity to sign up for CARE/FERA immediately.

SCE marketing approach was to distinguish CARE and FERA customers by having noticeable differences in the campaign, understanding the demographics and target audience for each program, and tailoring the marketing to the specific groups. Currently, SCE is engaging customers in multiple channels to match the customer's preferred way to communicate, either via social media, text message campaigns, direct mail, email, sce.com, webinars, community-based organizations, and banner ads in applications.

Direct Marketing

Email & Direct Mail

SCE targets customers that may be eligible for and benefit from income-qualified programs. CARE customers can receive an average of 30% off their bills. In June, as part of the rate-discount annual solicitation process,

⁶ On February 14, 2022, PG&E, on behalf of the IOUs, filed the Annual Estimates of CARE Eligible Customers and Related Information. This number reflects estimates of SCE's CARE Eligible Participants for 2022, as reflected in filing A. 19-11-003, et al., Annual CARE Eligibility Estimates.

SCE included CARE / FERA enrollment applications in the bills of non-CARE residential customers who receive a paper bill. A similar digital communication was sent to non-CARE residential customers who receive paperless billing.

Internal Outreach

SCE's CCC continues using various methods to directly enroll customers in the CARE program during incoming calls to the center. CARE is offered on all new customer turn-on requests and/or when a customer expresses a need for help with their bill or has expressed financial hardship. CARE representatives will first offer to take the enrollment over the phone or if requested by the customer, be directly transferred to the Interactive Voice Response (IVR) system. The IVR allows customers who prefer a self-service phone option to enroll. Additionally, if requested, the Customer Service Representative may alternately send a paper Rate Discount Application to the customer. These enrollment options provide customers with choices and maximizes their opportunity to enroll in the CARE program.

SCE.com Website

SCE provides information on programs and services for income-eligible customers and those experiencing financial hardship. Customers can utilize self-service and enroll into various programs on sce.com. Customers may also find additional resources and assistance beyond SCE/IOU programs. SCE continually updates sce.com/billhelp and sce.com/findsupport to include information for SCE and non-SCE assistance programs. Landing pages include program descriptions and direct links to external organizations' websites for more information and/or enrollment. Assistance programs include, but are not limited to, the Low-Income Home Energy Assistance Program (LIHEAP); the CA COVID-19 Rental Assistance Program / Emergency Renters Assistance Program; California LifeLine; County 2-1-1; as well as low-cost solar options through GRID Alternatives. As required by the Joint Stipulation approved through the Income Qualified Programs Final Decision A.19-11-003, a web link and contact information for the California Emerging Technology Fund's (CETF) affordable broadband and computers offer has been updated on sce.com/billhelp. To date, SCE has tracked 858 clicks on CETF's link which directs customers to everyoneon.org/getconnected

An illustration of the Billing Assistance Programs page on sce.com appears below.

Quick Services

Your Home

Demand Response

Rebates, Incentives & Saving Tips

Help Paying Your Bill

CARE/FERA Discounted Rates

One-Time Bill Assistance

Energy Savings Assistance Program

Medicaid Baseline Allowance

Home Efficiency Guide

Electric Vehicles

Generating Your Own Power

Rates

Energy Education Centers

Your Business

Customer Support

Partners & Vendors

Outage Center

Safety

Wildfire Safety

Bill Assistance Programs

[Home](#) > [Your Home](#) > [Help Paying Your Bill](#)



Need Time to Pay Your Bill?

If you are having trouble paying your bill, we encourage you to learn more about our [long-term assistance options](#).

If you have lost your job recently or your income has changed, you may also qualify for a reduced energy rate through our [CARE or FERA programs](#).

12-month Payment Arrangements Plan

Residential customers with a past due balance may qualify for a 12-month repayment plan. Call us at [1-800-655-4555](#) for more information.

On-going Bill Support

You may be eligible for a discount on your monthly bill through the California Alternate Rates for Energy (CARE) or Family Electric Rate Assistance (FERA) programs.

[Learn More >](#)

1-Time Assistance

Need a little extra help this month? The Energy Assistance Fund provides up to \$300 to eligible customers once a year. You can participate by applying for assistance or make a donation.

[Learn More >](#)

Free Upgrades

We can help you save over time through the Energy Savings Assistance Program. If you're eligible, we'll cover the cost of efficient new appliances and installation.

[Learn More >](#)

Energy Management Center

Manage your energy use with Smart products, programs and tools by visiting the Energy Management Center.

[Learn More >](#)

Low Income Home Energy Assistance Program (LIHEAP)

LIHEAP is a federally funded program aimed to assist low-income households that pay a high portion of their income to meet their energy needs. LIHEAP is funded by the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services.

[Learn More >](#)

COVID-19 Rent Relief

COVID-19 Rent Relief will help income-eligible households pay rent and utilities.

[Learn More >](#)

Low-Cost Internet and Computers

You may be eligible for low-cost internet and computers.

Learn more at [everyoneon.org/getconnected](#) or call [\(866\) 519-8655](#).

Experiencing Financial Hardship?


If you're a renter who has experienced financial hardship as a result of COVID-19 and meets income guidelines, you may be eligible for rent and utility bill assistance. Depending on where you live, you may apply to the program administered in your community.

SCE continues to improve communications with customers to increase awareness of all assistance programs.

In June, SCE revamped the sce.com CARE/FERA main page to provide more customer-friendly language, visuals, and referrals to other assistance programs.

FERA & CARE Discounted Rates


[Home](#) > [Your Home](#) > [Help Paying Your Bill](#) > FERA & CARE Discounted Rates




Financial Assistance for Families and Individuals

SCE understands that many customers continue to struggle financially, and that sometimes other expenses must come first. Our **Family Electric Rate Assistance (FERA)** and **California Alternate Rates for Energy (CARE)** financial assistance programs help qualifying families of all sizes lower their monthly energy bills when they need it most.

Apply or Recertify Now >

 **Learn About FERA and CARE**


Both FERA and CARE provide significant discounts to customers who qualify for bill assistance based on their household size and income. A single application takes two minutes to complete. No additional documentation is required.



FERA

Qualifying families and households of three or more receive an 18% discount on their electric bills.

Apply Now >



CARE

Qualifying individuals and households of two or more receive up to 30% off their electric bills. Learn more or apply by phone at [1-800-447-6620](tel:1-800-447-6620).

Apply Now >

20

How to Apply



Apply Online

Applying is quick and easy.
No additional
documentation is required.

[\(Application tips\)](#)

[Apply Now >](#)



Mail-In Application

Download an application,
print, and mail it to us.

[Large Print Application](#) 

[Standard Print
Application](#) 



Call Us

Customer support

M-F 7 am - 7 pm PST
Sat 8 am - 5 pm PST

[Call 1-800-447-6620](#)

Already Enrolled?

Recertify

CARE and FERA participants must re-enroll every
two years. If you received a recertification notice in
the mail, it's time to re-enroll.

[Recertify Now >](#)

CARE Post-Enrollment Verification

CARE program participants may be asked to verify
their eligibility.

[Verify Now >](#)



Additional Economic Assistance

Our commitment to meeting your needs continues with additional bill-pay and financial assistance programs.

Arrearage Management Plan (AMP)

Customers enrolled in CARE or FERA with past-due bills at least 90 days old totaling \$500 or more, and who has been a customer of SCE for at least six months and made an on-time payment within the last 24 months, maybe forgiven one-twelfth (1/12) of their eligible past-due amounts in exchange for on-time payment of the current monthly bill.

[Learn More >](#)



Medical Baseline Allowance Program

Users of electrically powered medical equipment may qualify for an additional 16.5 kilowatt-hours per day at the lowest baseline rate to help offset the cost of operating the medical equipment.

[Learn More >](#)

Low Income Home Energy Assistance Program (LIHEAP)

Offered by the U.S. Department of Health and Human Services, LIHEAP provides additional federally funded assistance for home energy costs.

[Learn More >](#)

Energy Assistance Fund (EAF)

Qualifying customers can receive one-time monetary assistance with their energy bill. We work with over 80 community-based organizations to make applying easy and accessible.

[Learn More >](#)



Other Discounts

SCE helps lower energy costs for income-qualified customers.

Submetered Tenants

Rate discounts are available for qualified tenants billed for energy usage through their landlords in apartment buildings, mobile-home parks, residential RV parks, or marinas.

[Apply Now >](#)

CA Lifeline Program


CARE recipients may qualify to lower the cost of their phone bills through the California Lifeline Program offering discounted home phone or cell phone services to eligible households.

Call [1-866-272-0349](tel:1-866-272-0349) (English), or

[1-866-272-0350](tel:1-866-272-0350) (Spanish)


Solar

Qualified homeowners residing in a disadvantaged community (DAC) and considering solar may qualify for a free solar power system from our partner, GRID Alternatives.

[Learn More >](#) 

Capitation Fee Program

If your organization dedicates resources to enrolling individuals and families in these programs, you could be entitled to a [capitation fee to help offset your expenses](#).

[Apply Now >](#) 

Nonprofit Group Living Facility

The CARE program offers a monthly discount on energy bills for qualifying nonprofit group-living facilities. Learn if your tax-exempt group-living facility

Low-Cost Internet and Computers

You may be eligible for discounts up to \$30 per month for fast home Internet service, and up to \$100 for a computer or tablet.

Leveraging Current Partnerships

SCE continues to leverage its network of community-based organizations (CBOs) and faith-based organizations (FBOs) to promote the CARE/FERA Programs. SCE instructed its network of agencies to promote the increase of customer outreach by way of email and telephone. This outreach includes educating customers on the number of ways to enroll in the CARE/FERA program,

including utilizing SCE's website and the CCC whereby customers can instantly enroll in the programs and receive CARE/FERA discounts within the current bill cycle. SCE is making efforts to reach different segments of potential income-qualified customers and customers in need by working more extensively with CBOs. These CBOs may focus on segments such as refugees, veterans, religions, homeless prevention, family outreach and assistance, and food banks.

Capitation Fee Program

The CARE/FERA Capitation Fee Program team is continuing its efforts to engage existing Capitation Agencies while strategically registering additional contractors to overcome enrollment barriers, including language, culture, and special needs, to enroll the hardest-to-reach customers. Because of these efforts, the Capitation Fee Program continues to show enrollments from agencies that were previously inactive. In 2022, SCE has begun recruiting dedicated FERA Capitation Agencies in order to bolster FERA enrollments.

SCE currently has 65 CARE/FERA Capitation Agencies which help income-qualified customers gain assistance through the CARE and FERA programs. In June capitation contractors and outbound calling efforts successfully enrolled 274 new customers in the CARE/FERA Program. Current and ongoing campaign strategies and efforts include:

- Leveraging events sponsored by communities and cultural celebrations to reach populations that may be eligible to enroll in the CARE Program.
- Partnering with SCE personnel to leverage existing SCE relationships with FBOs, CBOs, and local governments.
- Utilizing existing channels to develop creative approaches for agencies to conduct CARE/FERA outreach, including community-based virtual outreach events and 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 enrolls new CARE customers through the Energy Assistance Fund (EAF) program, an income-qualified program that helps residential households pay their electric bills. In June, 420 customers who received EAF grants were enrolled in CARE. EAF is funded through voluntary donations from SCE employees, shareholders, and customers. EAF partners with the United Way of Greater Los Angeles and 80+ community-based organizations to process EAF assistance requests and applications.

SCE utilizes social media such as Facebook and Instagram to promote EAF as well as inform customers on how to apply for grants.

SCE coordinates CARE enrollment with other income-qualified programs, such as ESA, LIHEAP, SoCalGas and certain water utilities. ESA

participants are automatically enrolled in CARE each month. As described in this report, the CARE Program continuously makes efforts to integrate messaging with the ESA Program at outreach events, through communications, and through marketing campaigns that inform attendees about the ESA and CARE program available to qualifying customers.

Community Outreach & Engagement

SCE increased its collaboration with Community Based Organizations (CBO). SCE shared information with CBOs which in turn shared it with their constituents. The resources include rates, wildfire and emergency preparedness, critical care backup battery, IQP (CARE/FERA/ESA), medical baseline, and COVID-19 assistance to low-income, senior, access and functional needs, tribal, multicultural, hard-to-reach, and high fire risk communities.

2.3. CARE Recertification Complaints

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

In response to the COVID-19 State of Emergency and associated protections, all CARE and FERA recertifications and verifications had been halted. The protections ended on September 30, 2021, so recertifications were allowed to resume in October 2021. During the month of June, SCE received eleven recertification complaints of which five were resolved and closed. At the end of June, there were a total of six recertification complaints pending to be resolved.

2.4 Miscellaneous

CPUC Resolution M-4835 and D.19-07-015 established a permanent set of emergency disaster customer protection measures that the utilities are mandated to implement in the event of a declared emergency. In response to the mandated customer protections, SCE has implemented a CARE post-enrollment verification (PEV) freeze to low-income customers impacted by the California emergencies / events for a period of one year commencing from the date the Governor of California issued an emergency proclamation due to a disaster.

Per Resolution M-3835 and D.19-07-015, the following table shows a list of affected counties currently under emergency protections.

Date of Proclamation	Disaster Name	Affected County
10/21/2021	Alisal Fire	Santa Barbara
10/22/2021	French, Windy, and KNP Complex Fires	Kern and Tulare

Recertification Extensions

SCE identified that our new SAP-based customer service system cannot initiate more than 4,500 recertification requests per day or risk potential system failures which would result in recertification requests not being mailed. To ensure all customers receive their recertification requests, the system will issue the first 4,500 requests and extend the due dates for the additional recertifications to a day that has a lower volume of requests. See the follow table for an example:

Sample of Recertification Extension Methodology

Current Recert Date	Batch Date (RECERT Date 90 days) 2021	Current Count of Records	Extra/Less than optimum (#4500)	RECERT date Move-to	Move Ahead Days	Remarks	Expected New count
1/7/2022	9-Oct	6784	-2284	1/10/2022	3	Move to 10-Jan	4500
1/8/2022	10-Oct	6475	-1975	1/11/2022	3	Move to 11-Jan	4500
1/9/2022	11-Oct	6162	-1662	1/17/2022	8	Move to 17-Jan	4500
1/10/2022	12-Oct	1464	3036	N/A	N/A	N/A	3748
1/11/2022	13-Oct	518	3982	N/A	N/A	N/A	2493

CARE/FERA and CCAs

Western Community Energy (WCE), a Community Choice Aggregator (CCA), recently filed for bankruptcy and 113.5K customers were transitioned back to Southern California Edison (SCE) generation service. During the transition, a billing system issue resulted in accounts being incorrectly enrolled in or de-enrolled from the CARE and FERA programs. SCE has corrected these accounts and is working to ensure customers receive an accurate, updated bill.

SCE held a virtual townhall meeting to update WCE customers and answered their questions. A special Call Center phone number was implemented specifically for WCE customers which bypasses normal wait times and is staffed by trained representatives familiar with the WCE transition. Additionally, letters were mailed to all impacted customers explaining the transition. These letters included the special WCE phone number should the customers have additional questions.

In our commitment to continuous improvement, SCE has leveraged the lessons learned from the WCE transition and has developed new processes to mitigate the issues outlined above. These processes include technical enhancements to our customer service system, updated technical analytics, and the use of robotics for timely, mass corrections. As a result, SCE has been able to transition customers better to and from CCAs.

2.5 Pilots and Studies

2.5.1 CARE Program Studies

2022 Low Income Needs Assessment (LINA) Study

The statewide Low Income Needs Assessment is a statewide study project-managed by SCE. The contractor hired to conduct the study is Evergreen Economics. The objective of the 2022 Needs Assessment is to better understand the needs of low-income renters. In terms of status, the research plan was finalized in March 2021. Since then, a market characterization has been conducted based on current census data, interviews with CBOs and contractors were conducted, the data collection sampling plan was finalized, and data collection instruments have been developed. The project is on track to be completed by December 2022.

ESA/CARE Categorical Study

The statewide Categorical Study will examine the relative alignment of the means-tested programs currently used as proxies for low income to enable enrollment in ESA, CARE and FERA. The study will also examine the potential of these programs to facilitate automatic enrollment in the income qualified programs. The study is expected to be completed by December 2022.

CARE CHANGES Evaluation

The CHANGES program will have 2 evaluations during the program cycle. The CPUC's Customer Affairs division is leading the evaluation with assistance from Energy Division staff. PG&E is managing the contract on behalf of the four IOUs and the CPUC. The first evaluation work scope was distributed in November and the evaluation consultant was selected in December 2021. Opinion dynamics was selected to evaluate the project. During first quarter the study team and the evaluator discussed potential adjustments to the submitted word scope prior to finalizing the full research plan.

2.5.2 CARE Program Pilot (Outbound PEV Pilot)

SCE has been meeting with the other statewide IOUs to simultaneously conduct a coordinated six-month outbound call pilot for "attempted but failed" Post-Enrollment Verification (PEV) households. These meetings have allowed the

IOUs to discuss operational workflows and reporting requirements. The Outbound PEV Pilot launched on June 1st.

3. FERA EXECUTIVE SUMMARY

3.1. FERA Program Summary

The FERA program is a low-income energy rate program that provides a monthly discount to qualifying households in SCE's service territory. To qualify for FERA, households of three or more must have income above 200% of the Federal Poverty Guidelines and be at or below 250% of the Federal Poverty Guidelines. Through FERA, customers can save about 18% a month on their electric bill. Income qualified customers include residential single-family households and customers in sub-metered residential facilities.

On our current DSRS modeling approach: The Income Qualified Program (IQP) will continue to use Disproportionate Stratified Random Sampling (DSRS) framework to capture more of those customers who are more likely to fail the FERA eligibility verification. In this light, IQP shall sample a greater share of customers residing in "high income" areas as well as those who have been enrolled in either program for only a short period of time. More specifically, customers living in areas where the proportion of households having incomes of 200% of the Federal Poverty Level (FPL) and below is lower than the overall median level of this measure for the entire low-income population will be oversampled 1.5 times relative to customers who reside in areas where the proportion of households with incomes of 200% FPL and below is at or above the median of the same poverty measure. Additionally, customers who have been enrolled in FERA for two years or less will also be oversampled 1.5 times relative to customers who have been with either low-income program for more than two years.

Please provide FERA Program summary costs.

The following table provides the FERA budget ad expenses by category.⁷

FERA Budget Categories	Authorized Budget	Expenses Year-to-Date	% of 2022 Budget Spent
Outreach	\$665,695	\$484,135	73%
Processing / Certification Re-certification	\$382,745	\$-	0%
Post Enrollment Verification	\$120,867	\$-	0%
IT Programming	\$30,000	\$4,021	13%
Pilot(s)	\$-	\$-	0%
Studies	\$24,000	\$-	0%
Regulatory Compliance	\$15,445	\$-	0%
General Administration	\$43,153	\$13,820	32%
CPUC Energy Division	\$4,375	\$-	0%
Total Expenses	\$1,286,280	\$501,976	39%
Subsidies and Benefits	\$28,746,536	\$4,781,012	17%
Total Program Costs & Discounts	\$30,032,816	\$5,282,988	18%

Provide the FERA Program enrollment rate to date.

FERA Enrollment		
Participants Enrolled	Eligible Participants	Enrollment Rate
25,358	221,674	11%

3.2 Outreach

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

The CARE and Family Electric Rate Assistance (FERA) outreach efforts and communications to SCE's in-language and underpenetrated areas continue to be a priority. SCE's CARE/FERA programs partner with internal departments such as Local Public Affairs (LPA), Consumer Affairs, Marketing, Corporate Communications, Strategic Engagement, and Business Solutions. SCE also conducts external outreach efforts with

⁷ FERA budget reflects what was authorized in D.21-06-015 at 472, OP 1.

various chambers, foundations, faith-based and community-based organizations in different activities that target SCE's hard-to-reach customer base.

SCE continues to provide all customers who contact SCE's Customer Contact Center (CCC) to request payment arrangements the opportunity to sign up for CARE/FERA immediately.

SCE marketing effort to distinguish CARE and FERA customers by having noticeable differences in the campaign, understanding the demographics and target audience for each program, and tailoring the marketing to the specific groups. SCE is ramping up outreach activities to FERA customers to meet the 50% penetration goal by 2023. This campaign will help target FERA customers in a different way than previous years. SCE will engage customers in multiple channels to fit the customers' preferred way to communicate via social media, text message campaigns, direct mail, email, sce.com, webinars, community-based organizations, and banner ads in applications. SCE will increase its digital communication and email methodology for efficient and effective marketing to grow FERA participation.

Direct Marketing

SCE targets customers who may be eligible for and benefit from income qualified programs. FERA customers can receive an average of 18% off their bill. In June, as part of the rate-discount annual solicitation process, SCE included CARE / FERA enrollment applications in the bills of non-CARE residential customers who receive a paper bill. A similar digital communication was sent to non-CARE residential customers who receive paperless billing.

Community Outreach & Engagement

SCE increased its collaboration with Community Based Organizations (CBOs). SCE shared information with CBOs which in turn shared it with their constituents. The resources include information regarding rates, wildfire and emergency preparedness, critical care backup battery, IQP (CARE/FERA/ESA), medical baseline, and COVID-19 assistance to low-income, senior, access and functional needs, tribal, multicultural, hard-to-reach, and high fire risk communities.

FERA Partners (Capitation Agencies)

Capitation Agencies	
ESA Leads	N/A
FERA Enrollments	0
FERA Recertifications	N/A

3.3 FERA Recertification Complaints

3.3.1 Report the number of customer complaints received (formal or informal, however and wherever received) about their FERA recertification efforts, with the nature of the complaints and resolution.

There were no FERA recertification complaints for the month of June.

3.4 Pilots and Studies

3.4.1 FERA Program Studies

Categorical Study

3.4.2 FERA Program Pilot

FERA currently has no program pilot underway.

4. APPENDIX A – ESA, CARE, AND FERA PROGRAM TABLES

4.1 ESA Program Summary Expenses

ESA Program - Table 1 - Main Program (SF, MH, MF In-Unit) Expenses

ESA Program - Table 1A – MF In-Unit, MF CAM, MFWB, Pilot(s) and CSD Leveraging Program Expenses

ESA Program - Table 2 - Program Expenses & Energy Savings by Measures Installed (SF, MH, MF In-Unit)

ESA Program - Table 2A - Program Expenses & Energy Savings by Measures Installed (CSD Leveraging)

ESA Program - Table 2B - Program Expenses & Energy Savings by Measures Installed (Multifamily Common Area Measures)

ESA Program – Table 2B-1 – Eligible Common Area Measures List

ESA Program - Table 2C - Pilot Plus and Pilot Deep Program Expenses & Energy Savings by Measures Installed

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

ESA Program - Table 3A, 3B, 3C, 3D, & 3F - Average Bill Savings per Treated Home

ESA Program - Table 4A, 4B, 4C, & 4D – Homes/Buildings Treated

ESA Program - Table 5A, 5B, 5C, & 5D - Program Customer Summary

ESA Program - Table 6 - Expenditures for Pilots and Studies

ESA Program – Table 7 – Customer Segment Participation/Enrollments

ESA Program – Table 8 – Clean Energy Referral, Leveraging, and Coordination

ESA Program – Table 9 – Tribal Outreach

4.2 CARE Program Tables

CARE Program - Table 1 - CARE Overall Program Expenses

CARE Program - Table 2 - CARE Enrollment, Recertification, Attrition, and Penetration

CARE Program - Table 3a & 3b - CARE Post-Enrollment Verification Results (Model & High Usage)

CARE Program - Table 4 - Enrollment by County

CARE Program - Table 5 - Recertification Results

CARE Program - Table 6 - Capitation Contractors

CARE Program - Table 7 - Expenditures for Pilots and Studies

CARE Program - Table 8 - Disadvantage Communities Enrollment Rate

CARE Program - Table 8a - Top 10 Lowest Enrollment Rates

4.3 FERA Program Tables

FERA Program - Table 1 - FERA Overall Program Expenses

FERA Program - Table 2 - FERA Enrollment, Recertification, Attrition, and Penetration

FERA Program - Table 3a & 3b - FERA Post-Enrollment Verification Results (Model & High Usage)

FERA Program - Table 4 - Enrollment by County

FERA Program - Table 5 - Recertification Results

FERA Program - Table 6 - Capitation Contractors

Table 1: Intensified ESA Activity in the Impacted Area Pursuant to D.16-04-040 ¹

Reporting Month/Year – June 2022 [1]			
1. Total Homes Eligible:		1,322,388	
2. Total Homes Visited in Aliso Canyon Territory:		450,562	
2a. “Go-Back” Homes:		238,878	
2b. First Touch Homes:		166,684	
3. Percent of treated homes prioritized due to “High Usage”:		1.18%	
4. Percent of treated “Multi-Family” units prioritized:		37.99%	
5. Percent of homes jointly treated by SCE and SoCalGas:		55.02%	
6. Average Per Home Savings for Homes Treated as a result of suspended program rules:		453.09 kWh / 0.066 kW	
7. Number of homes in the pipeline:		492	
8. Installed Measures by SoCalGas		9. Installed Measures by SCE	
HE Clothes Washers:	N/A	CFLs [2]:	431,811
Water Heater Blankets:	N/A	Fluorescent Torchiere Lamps:	11,969
Low Flow Showerheads	N/A	LED A-Lamps:	1,950,450
Water Heater Pipe Insulation:	N/A	LED Torchiere and LED Reflector Lamps:	131,648
Faucet Aerator:		Exterior Fixture	1,054
Thermostatic Shower Valve:	N/A	Tier 1 and Tier 2 Smart Power Strips:	357,138
Air Sealing/Envelope:	N/A	Energy Education	357,048
Attic Insulation:	N/A	Refrigerator Replacement:	57,657
Duct Testing & Sealing:	N/A	Freezer Replacement	248
Furnace Clean & Tune:	N/A	Room A/C Replacement:	1,715
		Evaporative Cooler Installation:	37,664
		Pool Pump Replacement:	8,046
		Central A/C & Heat Pump Replacement:	11,204
		Duct Test and Sealing	10,401
		Smart Thermostats	877
		Efficient Fan Control	207
		High Efficiency Clothes Washer	23
		Envelope Air Sealing	3,008
		Attic Insulation	9
		Tank and Pipe Insulation	214
		Other Hot Water	1,514
		Thermostatic Shower Valves Combined	1
		Thermostatic Shower Valve	30

¹ Table 1: Intensified ESA Activity in the Impacted Area Pursuant to D.16-04-040

Therms Saved:	N/A	kWh Saved:	204,145,174
		kW Saved:	29,870
Total Expenses:	N/A	Total Expenses:	\$239,921,802

Footnotes:

1. Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect Program-To-Date adjustments.
2. Includes exterior hard wired CFL fixtures.

10. SCE and SoCalGas are to prioritize near-term electric and natural gas savings respectively.

a. Which measures have been identified as providing the highest near-term savings, and how are they being prioritized?

SCE has identified refrigerator replacements and pool pump replacements as “Go Back” targets due to their large near term, and enduring long term, energy savings. SCE analyzed data from assessed homes that did not previously qualify for replacement of these measures to identify homes most likely to qualify for replacement of these two high impact and cost-effective measures.

11. SCE and SoCalGas should target a minimum average energy savings increase of 10 percent in the affected region as compared to pre-emergency savings for the duration of the emergency time period.

a. Please provide your methodology for establishing pre-emergency baselines and comparing average energy savings achieved in the affected regions indicate and whether any automated measurement and verification tools are being utilized or considered.

A pre-emergency baseline was established from the 2015 program year. The 2015 total kWh and kW savings in the affected region was divided by 12 to obtain an average monthly savings number of 704,000 kWh and 97kW. From this baseline, the monthly savings goal in the Aliso Canyon area will be approximately 774,000 kWh and 107 kW. The estimated monthly targets are based on previous metered consumption analysis of an average treated home.

SCE may validate the achieved savings using a bill comparison methodology as is consistently used for the ESA program for all IOUs. The pre- and post-treatment comparison of AMI consumption data for treated homes is based on the standard metered data-based measurement and verification protocols for measuring savings for ESA treated homes. The validation of achieved savings may use a combination of automated metered consumption and/or planned impact evaluation depending on the timing of data needs. The needed lag in metered consumption data analysis necessitates use of existing estimates for the required monthly reporting of program accomplishments.

b. Please also discuss your progress in achieving the 10 percent savings increase.

Since April 28, 2016, 76,881,005 kWh and 10,310 kW have been saved in the Aliso Canyon area, for an average of 20,078,872 kWh and 273 kW per month, which continues to exceed the 10 percent savings.

12. SCE's and SoCalGas' suspension of the "3MM" and "Go-Back" rules should help capture significant savings of at least 4 and 3 percent respectively on average.

a. Please provide your methodology for calculating average kWh saved for homes made eligible through the aforementioned rule-suspensions and indicate whether any automated measurement and verification tools are being utilized or considered.

SCE has determined 501 kWh per month baseline kWh usage of homes in the impacted area by averaging a sample of homes on CARE in Los Angeles, Orange, Riverside, San Bernardino, and Ventura counties, an area which approximates the impacted area. SCE will strive to attain 4% savings over this baseline, while still providing *all* eligible and feasible measures to qualified homes in the identified impacted area.

See response to #11a above regarding automated measurement and verification tools.

13. SCE and SoCalGas should provide the treatment of the most energy-intensive single- and multi-family properties and target high energy using households first.

a. Please explain your strategy and progress identifying and targeting multi-family and high-usage homes.

SCE continues to leverage information determined via the CARE High Usage Verification process to identify and target energy intensive single-family, multi-family and mobile home households in the impacted area. Letters are sent to customers with the name and contact phone number for their local-area ESA program contractor, allowing interested customers to receive program information and a more direct ESA enrollment. Approximately 2% of the homes treated in Aliso Canyon area are CARE high usage customers.

14. SCE and SoCalGas are to leverage program offerings outside of the ESA Program portfolio that could also achieve energy savings (such as demand response or deployment of solar thermal water heaters).

a. Please discuss your strategy for encouraging customer participation in other demand response programs.

The CSI Thermal program had low participation rates and no longer has funding. SCE has ceased marketing the program.

In addition, SCE's contractor's Program Representatives continue to review the ESA Program Customer Energy Education and Resource Guide with each program enrollee at time of in-home enrollment. This Energy Education focuses on no-cost actions these low income customers can take to save energy and reduce their bills. Included in this education is instruction on how to sign up for My Account, which provides them with additional time and money savings tools and opportunities to participate in residential energy efficiency rebate programs.

Energy Savings Assistance Program Table - Summary Expenses
Southern California Edison
Through June 2022

ESA Program:	Authorized Budget			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Main Program (SF and MH)	\$ 63,665,148		\$ 63,665,148	\$ 5,587,106		\$ 5,587,106	\$ 34,141,915		\$ 34,141,915	54%		54%
ESA Multifamily In-Unit	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
ESA Multifamily Common Area Measures	\$ 1,800,000		\$ 1,800,000	\$ 46,778		\$ 46,778	\$ 966,659		\$ 966,659	54%		54%
ESA Multifamily Whole Building	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
ESA Pilot Plus and Pilot Deep	\$ 3,884,864		\$ 3,884,864	\$ -		\$ -	\$ -		\$ -	0%		0%
Building Electrification Retrofit Pilot	\$ 4,068,483		\$ 4,068,483	\$ 7,005		\$ 7,005	\$ 7,791		\$ 7,791	0%		0%
Clean Energy Homes New Construction Pilot	\$ 1,882,469		\$ 1,882,469	\$ -		\$ -	\$ -		\$ -	0%		0%
CSD Leveraging	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
ESA Program TOTAL	\$ 75,300,964		\$ 75,300,964	\$ 5,640,889		\$ 5,640,889	\$ 35,116,365		\$ 35,116,365	47%		47%

Energy Savings Assistance Program Table 1 - Main (SF, MH, MF In-Unit) Expenses
Southern California Edison
Through June 2022

Appliances	Authorized Budget			Current Month Expenses [3]			Year to Date Expenses			% of Budget Spent YTD		
ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency [1]	\$ 44,048,684		\$ 44,048,684									
AL 4702-E Approved Budget	\$ 14,727,388		\$ 14,727,388									
Appliances				\$ 1,647,540		\$ 1,647,540	\$ 8,701,191		\$ 8,701,191			
Customer Enrollment				\$ 277,766		\$ 277,766	\$ 2,696,778		\$ 2,696,778			
Domestic Hot Water				\$ 391		\$ 391	\$ 5,733		\$ 5,733			
Enclosure				\$ 844		\$ 844	\$ 15,816		\$ 15,816			
HVAC				\$ 2,909,681		\$ 2,909,681	\$ 16,079,687		\$ 16,079,687			
In Home Education				\$ 84,400		\$ 84,400	\$ 795,100		\$ 795,100			
Lighting				\$ 96,751		\$ 96,751	\$ 922,062		\$ 922,062			
Miscellaneous [5]				\$ 343,999		\$ 343,999	\$ 2,681,935		\$ 2,681,935			
Pilot				\$ -		\$ -	\$ -		\$ -			
Energy Efficiency TOTAL	\$ 58,776,072		\$ 58,776,072	\$ 5,361,372		\$ 5,361,372	\$ 31,898,301		\$ 31,898,301	54%		54%
Training Center	\$ 600,650		\$ 600,650	\$ -		\$ -	\$ 33,775		\$ 33,775	6%		6%
Workforce Education and Training	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Inspections	\$ 1,677,406		\$ 1,677,406	\$ 92,286		\$ 92,286	\$ 587,715		\$ 587,715	35%		35%
Marketing and Outreach [4]	\$ 1,374,878		\$ 1,374,878	\$ 10,104		\$ 10,104	\$ (119,717)		\$ (119,717)	-9%		-9%
Studies	\$ 225,000		\$ 225,000	\$ (313)		\$ (313)	\$ 58,747		\$ 58,747	26%		26%
Regulatory Compliance	\$ 691,730		\$ 691,730	\$ 21,761		\$ 21,761	\$ 292,190		\$ 292,190	42%		42%
General Administration	\$ 6,218,785		\$ 6,218,785	\$ 101,895		\$ 101,895	\$ 1,361,770		\$ 1,361,770	22%		22%
CPUC Energy Division	\$ 51,579		\$ 51,579			\$ -	\$ 29,135		\$ 29,135	56%		56%
SPOC	\$ 171,929		\$ 171,929	\$ 3,748		\$ 3,748	\$ 18,233		\$ 18,233	11%		11%
TOTAL PROGRAM COSTS	\$ 69,616,100		\$ 69,616,100	\$ 5,587,106		\$ 5,587,106	\$ 34,141,915		\$ 34,141,915	49%		49%
Funded Outside of ESA Program Budget												
Indirect Costs				\$ 79,324		\$ 79,324	\$ 520,818		\$ 520,818			
NGAT Costs												

[1] Reflects the authorized 2022 Program Year budget approved in CPUC Decision 21-06-015, June 13, 2021. Includes budget for two BE Pilots.

[2] Reflects the budget approved in AL 4702-E, Jan 26, 2022.

[3] Financial data for Energy Efficiency total monthly and year-to-date expenses are obtained from EMAPS; financial data for Training Center, Inspections, Marketing & Outreach, Measurement & Evaluation Studies, Regulatory Compliance, General Administration, and CPUC Energy Division monthly and year-to-date expenses are obtained from SAP.

[4] Negative amounts reflect reversal of December 2021 accruals

[5] Includes contractor advance payments

[X] Please indicate whether authorized budget includes shifted funds from previous years and/or prior program cycles. (Yes or No) If yes, please specify amount, date fund-shifting

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Energy Savings Assistance Program Table 1A - MF In-Unit, MF CAM, and MFWB Expenses
Southern California Edison
Through June 2022

ESA Program (Multifamily):	Authorized Budget [1] [2]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Multifamily In-Unit	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
ESA Multifamily Common Area Measures	\$ 1,800,000		\$ 1,800,000	\$ 46,778		\$ 46,778	\$ 966,659		\$ 966,659	54%		54%
ESA Multifamily Whole Building	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
ESA Program (Multifamily)TOTAL	\$ 1,800,000		\$ 1,800,000	\$ 46,778		\$ 46,778	\$ 966,659		\$ 966,659	54%		54%

[1] Expenditures for MF In-Unit by end use is shown on ESA Summary Table.

[2] Expenditures for MF Common Area Measures by end use is shown on ESA Table 2B.

Energy Savings Assistance Program Table 1A-1 - Pilot Plus and Pilot Deep Expenses

	Authorized Budget [1]			Current Month Expenses [2]			Year to Date Expenses [2]			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Pilot Plus and Pilot Deep Program	\$ 3,884,864		\$ 3,884,864	\$ -		\$ -	\$ -		\$ -	0%		0%
TOTAL	\$ 3,884,864		\$ 3,884,864	\$ -		\$ -	\$ -		\$ -	0%		0%

[1] Expenditures for Pilot Plus and Pilot Deep by end use is shown on ESA Table 2C.

[2] Data will be reported once program is launched. Timing TBD.

Energy Savings Assistance Program Table 1A-2 - Building Electrification Expenses

	Authorized Budget [1]			Current Month Expenses [2]			Year to Date Expenses [2]			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Building Electrification Program	\$ 4,068,483		\$ 4,068,483	\$ 7,005	\$ -	\$ 7,005	\$ 7,791		\$ 7,791	0%		0%
TOTAL	\$ 4,068,483		\$ 4,068,483	\$ 7,005	\$ -	\$ 7,005	\$ 7,791		\$ 7,791	0%		0%

[1] Expenditures for Building Electrification by end use is shown on ESA Table 2D.

[2] Data will be reported once program is launched. Timing TBD.

Energy Savings Assistance Program Table 1A-3 - Clean Energy Homes Expenses

	Authorized Budget [1] [2]			Current Month Expenses [2]			Year to Date Expenses [2]			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Clean Energy Homes Program	\$ 1,882,469		\$ 1,882,469	\$ -	\$ -	\$ -	\$ -		\$ -	0%		0%
TOTAL	\$ 1,882,469		\$ 1,882,469	\$ -	\$ -	\$ -	\$ -		\$ -	0%		0%

[1] Expenditures for Clean Energy Homes by end use is shown on ESA Table 2D.

[2] Data will be reported once program is launched. Timing TBD.

Energy Savings Assistance Program Table 1A-4 - Leveraging - CSD Expenses

	Authorized Budget [1]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Program Leveraging - CSD	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
TOTAL	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	0%		0%

[1] Expenditures for CSD Leveraging by end use is shown on ESA Table 2A.

NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Energy Savings Assistance Common Area Measures Program Table 2B
Southern California Edison
Through June 2022

Table 2B ESA Program - Multifamily Common Area Measures ⁸								% of Expenditure
ESA CAM Measures[1][6]	Units (of Measure such as "each")	Year-To-Date Completed & Expensed Installation						
		Quantity Installed	Number of Units for Cap-kBTU/h and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	
Appliances								
MF Freezer	Each	-		-	-		\$ -	0.0%
MF High Efficiency Clothes Washer	Home	-		-	-		\$ -	0.0%
MF Refrigerators	Each	-		-	-		\$ -	0.0%
Domestic Hot Water								
Central Boiler	Cap-kBTU/h	-		-	-		\$ -	0.0%
Faucet Aerator	Each	-		-	-		\$ -	0.0%
Pipe Insulation	Home	-		-	-		\$ -	0.0%
Envelope								
								0.0%
								0.0%
HVAC								
AC Tune-up	Cap-Tons	-		-	-		\$ -	0.0%
MF Central A/C Replacement	Home	1		568	0.09	-	\$ 13,626	1.4%
MF Duct Testing and Sealing	Home	1		-	-	-	\$ 690	0.1%
Furnace Replacement	Cap-kBTU/h	-		-	-		\$ -	0.0%
HEAT Pump Split System	Cap-Tons	-		-	-		\$ -	0.0%
HEAT Pump Split System	Each	-		-	-		\$ -	0.0%
MF Inspection	Each	7					\$ 1,470	0.2%
Programmable Thermostat	Each	27		7,183	-		\$ 6,360	0.7%
Lighting								
Exterior Parking Lot	Each	1,082		1,224,391			\$ 125,864	13.0%
LED A-Lamp	Each	476		108,805	2.16		\$ 5,028	0.5%
MF LED Exit Sign	Each	2		721	0.12		\$ 121	0.0%
Exterior LED Fixture	Each	3,524		186,602	-		\$ 480,507	49.7%
Interior LED Fixture	Fixture	2,447		55,823	6.49		\$ 303,451	31.4%
Exterior LED Lighting	Fixture	-		-	-		\$ -	0.0%
Exterior LED Lighting - Pool	Lamp	-		-	-		\$ -	0.0%
Interior LED Exit Sign	Fixture	-		-	-		\$ -	0.0%
Interior LED Lighting	KiloLumen	-		-	-		\$ -	0.0%
Interior LED Screw-in	Lamp	-		-	-		\$ -	0.0%
Interior TLED Type A Lamps	Lamp	-		-	-		\$ -	0.0%
Interior TLED Type C Lamps	Lamp	-		-	-		\$ -	0.0%
LED PL-Lamps	Each	540		41,289	0.42		\$ 6,117	0.6%
LED Pool and Spa Lighting	Each	3		2,628			\$ 1,449	0.1%
LED Reflector Lamp	Each	3		481	0.00		\$ 48	0.0%
MF LED T-Lamp	Each	774		37,930	0.62		\$ 7,173	0.7%
Miscellaneous								
Tier-2 Smart Power Strip	Each	-		-	-		\$ -	0.0%
Pool Pumps	Home	1		9,239	0.39		\$ 4,949	0.5%
Variable Speed Pool Pump	Each	-		-	-		\$ -	0.0%
MF CAM Enrollment Fees								
Enrollment Fees	Homes	22		-	-		\$ 9,808	1.0%
Ancillary Services								
Audit				-	-		\$ -	0.0%
Total								
		8,910		1,675,660	10.28		\$ 966,659	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated ²	26
Subtotal of Master-metered Multifamily Properties Treated	3
Total Number of Multifamily Tenant Units w/in Properties Treated ³	27
Total Number of buildings w/in Properties Treated	26

Year to Date Expenses			
ESA Program - Multifamily Comm	Electric	Gas	Total
Administration			\$ -
Direct Implementation (Non-Incendive)			\$ -
Direct Implementation	\$ 966,659		\$ 966,659
TOTAL MF CAM COSTS	\$ 966,659	\$ -	\$ 966,659

<<Includes measures costs

1. Measures are customized by each IOU, see "Table 2B-1, Eligible Measures List". Measures list may change based on available information on both costs and benefits and may vary across climate zones. Each IOU should fill out Table 2B as it pertains to their program. Table 2B-1 Column A should match Table 2B Column A for eligible (not canceled) measures.

2. Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings.

3. Multifamily tenant units are the number of dwelling units located within properties treated. This number does not represent the same number of

4. Audit costs may be covered by other programs or projects may utilize previous audits. Not all participants will have an audit cost associated with their project.

5. Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022, modified by D.17-12-009,

6. Commissioning costs, as allowable per the Decision, are included in measures total cost unless otherwise noted.

7. All savings are calculated based on SCE or Statewide Work Papers, or proxy values from most recent ESA Program Impact Evaluation for

8. MF lighting also includes occupancy sensors.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Energy Savings Assistance CAM Program Table 2B-1, Eligible Common Area Measures List
Southern California Edison
Through June 2022

Common Area Measures Category and Eligible Measures Title [1]	Effective Date	End Date[2]	Eligible Climate Zones [3]
Appliances			
Pool Pumps	10/1/2018	6/30/2021	All
Domestic Hot Water			
Envelope			
Enclosure			
Air Sealing / Envelope [1]	10/1/2018	6/30/2021	All
Attic Insulation	10/1/2018	6/30/2021	All
HVAC			
Room A/C Replacement	10/1/2018	6/30/2021	10, 13, 14, 15, 16
Central A/C replacement	10/1/2018	6/30/2021	13, 14, 15
Heat Pump Replacement	10/1/2018	6/30/2021	13, 14, 15
Evaporative Cooler (Installation)	10/1/2018	6/30/2021	10, 13, 14, 15, 16
MF Smart Thermostat	10/1/2018	6/30/2021	10, 13, 14, 15, 16
Lighting			
MF Ext Parking Lot	1/1/2021	6/30/2021	All
MF Landscape Lighting	10/1/2018	6/30/2021	All
MF LED A-Lamp	10/1/2018	6/30/2021	All
MF LED Exit Sign	10/1/2018	6/30/2021	All
MF LED Exterior Fixture	10/1/2018	6/30/2021	All
MF LED Interior Fixture	10/1/2018	6/30/2021	All
MF LED PL-Lamps	10/1/2018	6/30/2021	All
MF LED Pool and Spa Lighting	10/1/2018	6/30/2021	All
MF LED Reflector Lamp	10/1/2018	6/30/2021	All
MF LED Torchiere Lamp	10/1/2018	6/30/2021	All
MF LED T5 UL Type A	8/17/2019	6/30/2021	All
MF LED T8 UL Type A	8/17/2019	6/30/2021	All
Miscellaneous			
Smart Power Strips - Tier 1	10/1/2018	6/30/2021	All
New - Smart Power Strips - Tier 2	10/1/2018	6/30/2021	All

Standard Notes (do not delete)

1. Measures list may change based on available information on both costs and benefits (including energy benefits as well as non-energy benefits) and may vary across climate zones. This is not a list of installed measures, it is a list of eligible measures.

Table 2B-1 Column A should match Table 2B Column A for eligible (not canceled) measures.

2. Only complete if measure is canceled or discontinued

3. Defined as CEC California Building Climate Zones

https://www.energy.ca.gov/maps/renewable/building_climate_zones.html

Energy Savings Assistance Program Table 2C Pilot Plus and Pilot Deep
Southern California Edison
Through June 2022

Measures	Units	ESA Program - Pilot Plus [1]						Measures	Units	ESA Program - Pilot Deep [1]					
		Year-To-Date Completed & Expensed Installation								Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure			Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances								Appliances							
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
Domestic Hot Water								Domestic Hot Water							
	Home	-	-	-		\$ -	0.0%		Home	-	-	-		\$ -	0.0%
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
Enclosure								Enclosure							
	Home	-	-	-		\$ -	0.0%		Home	-	-	-		\$ -	0.0%
	Home	-	-	-		\$ -	0.0%		Home	-	-	-		\$ -	0.0%
	Home	-	-	-		\$ -	0.0%		Home	-	-	-		\$ -	0.0%
HVAC								HVAC							
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
	Home	-	-	-		\$ -	0.0%		Home	-	-	-		\$ -	0.0%
	Home	-	-	-		\$ -	0.0%		Home	-	-	-		\$ -	0.0%
	Home	-	-	-		\$ -	0.0%		Home	-	-	-		\$ -	0.0%
Maintenance								Maintenance							
	Home	-	-	-		\$ -	0.0%		Home	-	-	-		\$ -	0.0%
	Home	-	-	-		\$ -	0.0%		Home	-	-	-		\$ -	0.0%
Lighting								Lighting							
	Each					\$ -	0.0%		Each					\$ -	0.0%
	Each					\$ -	0.0%		Each					\$ -	0.0%
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
Miscellaneous								Miscellaneous							
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
	Each	-	-	-		\$ -	0.0%		Each	-	-	-		\$ -	0.0%
Customer Enrollment								Customer Enrollment							
ESA Outreach & Assessment	Home	-				\$ -	0.0%	ESA Outreach & Assessment	Home	-				\$ -	0.0%
ESA In-Home Energy Education	Home	-				\$ -	0.0%	ESA In-Home Energy Education	Home	-				\$ -	0.0%
Total Savings/Expenditures			-	-		\$ -	0.0%	Total Savings/Expenditures			-	-		\$ -	0.0%
Households Treated	Total							Households Treated	Total						
- Single Family Households Treated	Home							- Single Family Households Treated	Home						
- Mobile Homes Treated	Home							- Mobile Homes Treated	Home						
Total Number of Households Treated	Home							Total Number of Households Treated	Home						

[1] Data will be reported once program is launched. Timing TBD.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may

Note: IOUs - If there are new measures that are approved through the ESA Working Group, mark in column A as such to indicate that it is a new measure.

Energy Savings Assistance Program Table 2D Pilots
Southern California Edison
Through June 2022

ESA Program - Building Electrification Retrofit Pilot [1]							
Measures	Units	Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances							
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water							
	Home	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Enclosure							
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
HVAC							
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
Maintenance							
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
Lighting							
	Each					\$ -	0.0%
	Each					\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Miscellaneous							
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Customer Enrollment							
ESA Outreach & Assessment	Home	-				\$ -	0.0%
ESA In-Home Energy Education	Home	-				\$ -	0.0%
Total Savings/Expenditures			-	-	-	\$ -	0.0%
Households Treated	Total						
- Single Family Households Treated	Home						
- Mobile Homes Treated	Home						
Total Number of Households Treated	Home						

ESA Program - Clean Energy Homes New Construction Pilot							
Measures	Units	Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances							
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water							
	Home	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Enclosure							
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
HVAC							
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
Maintenance							
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
Lighting							
	Each					\$ -	0.0%
	Each					\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Miscellaneous							
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
Customer Enrollment							
ESA Outreach & Assessment	Home	-				\$ -	0.0%
ESA In-Home Energy Education	Home	-				\$ -	0.0%
Total Savings/Expenditures			-	-	-	\$ -	0.0%
Households Treated	Total						
- Single Family Households Treated	Home						
- Mobile Homes Treated	Home						
Total Number of Households Treated	Home						

[1] Data will be reported once program is launched. Timing TBD.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

**Energy Savings Assistance Program Tables 3A-F - Energy Savings and Average Bill Savings per
Treated Home/Common Area
Southern California Edison
Through June 2022**

Table 3A, ESA Program (SF, MH, MF In-Unit)	
Annual kWh Savings	13,754,615
Annual Therm Savings	
Lifecycle kWh Savings	115,454,763
Lifecycle Therm Savings	
Current kWh Rate	\$ 0.14
Current Therm Rate	
Average 1st Year Bill Savings / Treated households	\$ 60
Average Lifecycle Bill Savings / Treated Household	\$ 501

Table 3B, ESA Program - CSD Leveraging	
Annual kWh Savings	-
Annual Therm Savings	
Lifecycle kWh Savings	-
Lifecycle Therm Savings	
Current kWh Rate	\$ -
Current Therm Rate	\$ -
Average 1st Year Bill Savings / Treated Households	\$ -
Average Lifecycle Bill Savings / Treated Household	\$ -

Table 3C, ESA Program - Multifamily Common Area	
Annual kWh Savings	1,675,660
Annual Therm Savings	
Lifecycle kWh Savings	4,472,159
Lifecycle Therm Savings	
Current kWh Rate	\$ 0.14
Current Therm Rate	
Average 1st Year Bill Savings / Treated Property	\$ 5,972
Average Lifecycle Bill Savings / Treated Property	\$ 15,939

Table 3D, ESA Program - Pilot Plus [2]	
Annual kWh Savings	-
Annual Therm Savings	
Lifecycle kWh Savings	-
Lifecycle Therm Savings	
Current kWh Rate	\$ -
Current Therm Rate	\$ -
Average 1st Year Bill Savings / Treated Property	\$ -
Average Lifecycle Bill Savings / Treated Property	\$ -

Table 3E, ESA Program - Pilot Deep [2]	
Annual kWh Savings	-
Annual Therm Savings	
Lifecycle kWh Savings	-
Lifecycle Therm Savings	
Current kWh Rate	\$ -
Current Therm Rate	\$ -
Average 1st Year Bill Savings / Treated Property	\$ -
Average Lifecycle Bill Savings / Treated Property	\$ -

Table 3F, Summary - ESA Program (SF, MH, MF In-Unit)/CSD Leveraging/MF CAM/Pilot Plus and Pilot Deep [1]	
Annual kWh Savings	15,430,275
Annual Therm Savings	
Lifecycle kWh Savings	119,926,921
Lifecycle Therm Savings	
Current kWh Rate	\$ 0.14
Current Therm Rate	\$ -
Average 1st Year Bill Savings / Treated Households	\$ 6,032
Average Lifecycle Bill Savings / Treated Households	\$ 16,441

[1] Summary is the sum of ESA Program + CSD Leveraging + MF CAM + Pilot Plus + Pilot Deep
[2] Data will be reported once program is launched. Timing TBD.

Energy Savings Assistance Program Table 4 - Homes/Buildings Treated
Southern California Edison
Through June 2022

Table 4A, ESA Program (SF, MH, MF In-Unit)						
County	Eligible Households			Households Treated YTD		
	Rural [1]	Urban	Total	Rural	Urban	Total
Fresno	0	633	633	0	0	0
Imperial	282	0	282	0	0	0
Inyo	1,362	9	1,371	0	0	0
Kern	17,886	13,428	31,314	903	1	904
Kings	7,611	0	7,611	276	0	276
Los Angeles	2,884	501,121	504,005	140	13,439	13,579
Madera	0	2	2	0	0	0
Mono	2,292	0	2,292	0	0	0
Orange	0	200,645	200,645	0	3,502	3,502
Riverside	79,988	83,702	163,690	780	3,909	4,689
San Bernardino	43,828	193,062	236,890	850	6,048	6,898
San Diego	1	0	1	0	0	0
Santa Barbara	0	14,824	14,824	0	6	6
Tulare	37,874	12,323	50,197	778	262	1,040
Ventura	2,452	60,710	63,162	52	1,068	1,120
Total	196,460	1,080,459	1,276,919	3,779	28,235	32,014

Table 4B, ESA Program - CSD Leveraging						
County				Households Treated YTD		
				Rural	Urban	Total
						0
						0
Total				0	0	0

Table 4C, ESA Program - Multifamily Common Area						
County	Eligible Properties [2]			Properties Treated YTD		
				Rural [1]	Urban	Total
Fresno				0	0	0
Imperial				0	0	0
Inyo				0	0	0
Kern				0	0	0
Kings				0	0	0
Los Angeles				0	4	4
Madera				0	0	0
Mono				0	0	0
Orange				0	2	2
Riverside				2	3	5
San Bernardino				7	7	14
San Diego				0	0	0
Santa Barbara				0	0	0
Tulare				1	0	1
Ventura				0	0	0
Total				10	16	26

Table 4D, ESA Program - Pilot Plus and Pilot Deep [3]						
County	Eligible Households			Households Treated YTD		
	Rural [1]	Urban	Total	Rural	Urban	Total
Total					0	0

[1] For IOU low income-related and Energy Efficiency reporting and analysis, the Goldsmith definition is applied.

[2] Do not currently have Eligible Properties for ESA CAM.

[3] Data will be reported once program is launched. Timing TBD.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior

Energy Savings Assistance Program Table 5 - Energy Savings Assistance Program Customer Summary
Southern California Edison
Through June 2022

Table 5A, ESA Program (SF,MH, MF In-Unit)												
Month	Gas & Electric			Gas Only			Electric Only			Total		
	# of Household Treated by	(Annual)			# of Household Treated by	(Annual)			# of Household Treated by	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January												
February												
March												
April												
May												
June												
July												
August												
September												
October												
November												
December												
YTD	-	-	-	-	-	-	-	-	-	32,014	13,754,615	2,085

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Table 5B, ESA Program - CSD Leveraging												
Month	Gas & Electric			Gas Only			Electric Only			Total		
	# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January												
February												
March												
April												
May												
June												
July												
August												
September												
October												
November												
December												
YTD	-	-	-	-	-	-	-	-	-	-	-	-

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2A.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Table 5C, ESA Program - Multifamily Common Area												
Month	Gas & Electric			Gas Only			Electric Only			Total		
	# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January												
February												
March												
April												
May												
June												
July												
August												
September												
October												
November												
December												
YTD	-	-	-	-	-	-	-	-	-	26	1,675,660	10.3

Table 5D, ESA Program - Pilot Plus and Pilot Deep [1]												
Month	Gas & Electric			Gas Only			Electric Only			Total		
	# of Household Treated by	(Annual)			# of Household Treated by	(Annual)			# of Household Treated by	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January												
February												
March												
April												
May												
June												
July												
August												
September												
October												
November												
December												
YTD	-	-	-	-	-	-	-	-	-	-	-	-

[1] Data will be reported once program is launched. Timing TBD.

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2B.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Energy Savings Assistance Program Table 6 - Expenditures for Pilots and Studies
Southern California Edison
Through June 2022

	Authorized 2021-26 Funding [1]			Current Month Expenses			Year to Date Expenses			Cycle to Date Expenses [2]			% of Budget Expended		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots															
	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Total Pilots	\$ -		\$ -			\$ -			\$ -			\$ -	0%		0%
Studies															
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study [3]	\$ 75,000		\$ 75,000	\$ 5,830		\$ 5,830	\$ 43,080		\$ 43,080	\$ 69,181		\$ 69,181	92%		92%
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study	\$ 75,000		\$ 75,000	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study	\$ 75,000		\$ 75,000	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Joint IOU - Statewide CARE-ESA Categorical Study [4]	\$ 22,500		\$ 22,500	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Load Impact Evaluation Study	\$ 450,000		\$ 450,000	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Equity Criteria and Non Energy Benefits Evaluation (NEB's)	\$ 150,000		\$ 150,000	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Rapid Feedback Research and Analysis [5]	\$ 155,000		\$ 155,000	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Joint IOU - Multifamily CAM Process Evaluation [6]	\$ 90,000		\$ 90,000	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Joint IOU - Process Evaluation Studies (1-4 Studies)			\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Process Evaluation Studies (1-4 Studies)	\$ 150,000		\$ 150,000	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Discretionary [5]	\$ 300,000		\$ 300,000	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Total Studies	\$1,542,500		\$ 1,542,500	\$ 5,830		\$ 5,830	\$ 43,080		\$ 43,080	\$ 69,181		\$ 69,181	4%		4%

[1] Authorized per D.21-06-015. Funds for pilots and studies may be rolled over to the next program year or borrowed from a future program year within the cycle, to allow for flexibility in scheduling changes with these efforts. Funding amounts listed reflect SCE's 30% allocation among the IOUs. Final authorized budgets may be adjusted by the ESA/CARE Studies Working Group per D.21-06-015.

[2] Some studies cover multiple cycles. Hence this column total reflects the total study spending (as opposed to cycle spending)

[3] Advice letter approved Joint Utilities' 2022 LINA Study for \$500,000. SCE holds the statewide contract for this co-funded study. This report includes ONLY SCE portion of the totals. SCE is cross-billing the other IOUs, but may currently hold more of the total project expense until bills are reconciled. SCE's 30% allocation is \$150,000, funded 50/50 via the ESA and CARE budgets. The 2022 LINA commenced in January 2021. The Joint Utilities would carry over committed, unspent 2021 LINA funding forward to 2022 and until the study is completed.

[4] Authorized per D.21-06-015, the Categorical Study will be funded 50/50 via the ESA and CARE budgets.

[5] Authorized per D.21-06-015, for each IOU to use for IOU-specific studies as needed. Unused annual budget may be carried forward until the end of the cycle. SCE is using unspent funds from the "Rapid Feedback Research and Analysis" to fund the MF CAM Process Evaluation

[6] SCE is using unspent funds from the "Rapid Feedback Research and Analysis" to fund the MF CAM Process Evaluation. PG&E holds the statewide contract for this co-funded study. The study commenced in July 2021.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Energy Savings Assistance Program Table - 7 Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions
Southern California Edison
Through June 2022

ESA Main (SF, MH, MF in-unit)

Customer Segments	# of Households Eligible [1]	# of Households Treated [2]	Enrollment Rate = (C/B)	# of Households Contacted [3]	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measure) [4]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households
Demographic											
Housing Type											
SF	1,038,567	22,404	2.16%	45,007	50%		368	0.059			\$ 685
MH	112,319	1,984	1.77%	2,524	79%		358	0.051			\$ 685
MF In-Unit	413,248	7,626	1.85%	12,271	62%		292	0.043			\$ 365
Rent vs. Own											
Own	659,240	16,094	2.44%	34,995	46%		378	0.060			\$ 784
Rent	907,776	15,920	1.75%	24,807	64%		320	0.049			\$ 432
Previous	-	10,018		29,571	34%		334	0.051			\$ 586
New Participant	27,051	21,996	81.31%	30,231	73%		356	0.056			\$ 619
Seniors	434,847	7,062	1.62%	17,286	41%		361	0.055			\$ 715
Veterans [5]	87,251										
Hard-to-Reach [6]		29,997		53,296	56%		348	0.054			\$ 614
Vulnerable [7]											
Location											
DAC		15,956		32,586	49%		333	0.052			\$ 485
Rural	196,460	5,129	2.61%	8,147	63%		419	0.066			\$ 1,252
Tribal [5]											
PSPS Zone		411		415	99%		413	0.068			\$ 595
Wildfire Zone		4,824		8,030	60%		394	0.063			\$ 679
Climate Zone 06		2,136		4,099	52%		281	0.038			\$ 370
Climate Zone 08		8,436		18,748	45%		285	0.042			\$ 337
Climate Zone 09		6,801		13,770	49%		348	0.054			\$ 391
Climate Zone 10		8,959		13,099	68%		378	0.064			\$ 517
Climate Zone 13		2,034		3,744	54%		411	0.067			\$ 1,730
Climate Zone 14		2,075		3,971	52%		473	0.067			\$ 1,704
Climate Zone 15		873		1,557	56%		392	0.059			\$ 1,312
Climate Zone 16		700		814	86%		389	0.062			\$ 521
CARB Communities		28,546		52482	54%		344	0.054			\$ 569
Financial											
CARE	1,276,922	19,724	1.54%	49,916	40%		356	0.055			\$ 668
FERA	221,674	230	0.10%				375	0.060			\$ 743
Disconnected [8]				32,633							
Arrearages		14,965		2,279	657%		346	0.054			\$ 589
High Usage		74					364	0.059			\$ 985
High Energy Burden [7]				682							
SEVI - Unknown		152					282	0.042			\$ 437
SEVI - HIGH (59.6 to MAX)		10,640		39,455	27%		335	0.052			\$ 536
SEVI - MEDIUM (35.8 to 59.5)		10,659		15,490	69%		348	0.053			\$ 607
SEVI - LOW (3.2 to 35.6)		10,563		4,175	253%		366	0.059			\$ 685
Affordability Ratio [7]											
Health Condition											
Medical Baseline		945		3,462	27%		402	0.066			\$ 939
Respiratory [7]											
Disabled	322,035	3,315	1.03%	5,030	66%		353	0.053			\$ 640

Notes:

[1] Eligible household counts by segment provided by Athens. Segments with no data will be calculated internally at a later date.

[2] Households Treated data is not additive because customers may be represented in multiple categories.

[3] Includes only households that SCE contacted by direct mail or email campaigns for CY2021. Customers could also have been contacted multiple times within a year. They could also be contacted by other means, such as by contractors or another utility, which is not reflected in this value. SCE only tracks its direct mail and email campaign efforts.

[4] SCE does not currently offer HCS measures.

[5] Data for this segment is currently not being captured.

[6] Defined as a customer who meets at least one of the following characteristics: Prefers non-English language, is low income, lives in a mobile home or multifamily dwelling unit, is a renter/tenant, or is Rural.

[7] Currently evaluating definition, data sources, and/or calculation methodology. Will begin reporting with July 2022 data in August 2022.

[8] Based on calendar year 2021.

Res. M-4842 (approved on April 16, 2020) suspended service disconnections of residential and small business customers for non-payment. Disconnection suspension is in effect until April 16, 2021.

Res. M-4849 (approved on February 11, 2021) extends the existing Emergency Customer Protections for residential and small business customer through June 30, 2021. These protections include suspending of disconnection for nonpayment, waiving of late payment charges, and halting of verification for CARE, FERA, and Medical Baseline.

Pilot Plus and Pilot Deep [1]

Customer Segments	# of Households Eligible [1]	# of Households Treated [2]	Enrollment Rate = (C/B)	# of Households Contacted [3]	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measure) [4]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households
Demographic											
Housing Type											
SF											
MH											
MF In-Unit											
Rent vs. Own											
Own											
Rent											
Previous											
New Participant											
Seniors											
Veterans											
Hard-to-Reach											
Vulnerable											
Location											
DAC											
Rural											
Tribal											
PSPS Zone											
Wildfire Zone											
Climate Zone 06											
Climate Zone 08											
Climate Zone 09											
Climate Zone 10											
Climate Zone 13											
Climate Zone 14											
Climate Zone 15											
Climate Zone 16											
CARB Communities											
Financial											
CARE											
FERA											
Disconnected											
Arrearages											
High Usage											
High Energy Burden											
SEVI - Unknown											
SEVI - HIGH (59.6 to MAX)											
SEVI - MEDIUM (35.8 to 59.5)											
SEVI - LOW (3.2 to 35.6)											
Affordability Ratio											
Health Condition											
Medical Baseline											
Respiratory											
Disabled											

[1] ESA Pilot Plus/Deep program has not begun implementation.

Energy Savings Assistance Program Table - 8 Clean Energy Referral, Leveraging, and Coordination [1]
Southern California Edison
Through June 2022

Partner	Brief Description of Effort	# of Referral	# of Leveraging	# of Coordination Efforts	# of Leads	# of Enrollments
LIHEAP						
CSD						
SASH						
SDCWA						
CARE/Medical Baseline						
CARE High Usage						
Etc.						

Note to IOUs:

Leveraging activities would include when programs share resources to jointly support program delivery or administration.

While coordination refers more generally to program communication, collaboration, and alignment of activities to support individual program delivery.

[1] Table will be populated later in 2022

**Energy Savings Assistance Program Table - 9 Tribal Outreach
Southern California Edison
Through June 2022**

OUTREACH STATUS	Quantity (Includes CARE, FERA, and ESA)	List of Participating Tribes
Tribes completed ESA Meet & Confer	6	Benton Paiute, Bishop Paiute, Timbisha Shoshone, Chemehuevi, CRIT, Morongo
Tribes requested outreach materials or applications	2	Soboba, Agua Caliente
Tribes who have not accepted offer to Meet and Confer	4	Bridgeport Indian colony, Tule River, San Manuel, 29 Palms
Non-Federally Recognized Tribes who participated in Meet & Confer	N/A	
Tribes and Housing Authority sites involved in Focused Project/ESA	1	
Partnership offer on Tribal Lands	0	
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	0	
Housing Authority and TANF offices who participated in Meet and Confer	0	

**CARE Table 1 - CARE Program Expenses
Southern California Edison
Through June 2022**

CARE Program:	Authorized Budget			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Outreach	\$ 3,724,630	\$ -	\$ 3,724,630	\$ 944,907	\$ -	\$ 944,907	\$ 2,127,643	\$ -	\$ 2,127,643	57%	0%	57%
Processing / Certification Re-certification	\$ 1,530,979	\$ -	\$ 1,530,979	\$ 55,860	\$ -	\$ 55,860	\$ 364,621	\$ -	\$ 364,621	24%	0%	24%
Post Enrollment Verification	\$ 483,467	\$ -	\$ 483,467	\$ 72,382	\$ -	\$ 72,382	\$ 388,699	\$ -	\$ 388,699	80%	0%	80%
IT Programming	\$ 570,000	\$ -	\$ 570,000	\$ 11,895	\$ -	\$ 11,895	\$ 18,818	\$ -	\$ 18,818	3%	0%	3%
Pilots	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
CHANGES Program	\$ 525,000	\$ -	\$ 525,000	\$ 39,958	\$ -	\$ 39,958	\$ 177,830	\$ -	\$ 177,830	34%	0%	34%
Studies	\$ 36,000	\$ -	\$ 36,000	\$ 37,444	\$ -	\$ 37,444	\$ 37,444	\$ -	\$ 37,444	104%	0%	104%
Regulatory Compliance	\$ 478,809	\$ -	\$ 478,809	\$ 2,844	\$ -	\$ 2,844	\$ 175,946	\$ -	\$ 175,946	37%	0%	37%
General Administration	\$ 1,337,746	\$ -	\$ 1,337,746	\$ 98,108	\$ -	\$ 98,108	\$ 603,615	\$ -	\$ 603,615	45%	0%	45%
CPUC Energy Division	\$ 135,625	\$ -	\$ 135,625	\$ -	\$ -	\$ -	\$ 67,982	\$ -	\$ 67,982	50%	0%	50%
SUBTOTAL MANAGEMENT COSTS	\$ 8,822,256	\$ -	\$ 8,822,256	\$ 1,263,398	\$ -	\$ 1,263,398	\$ 3,962,598	\$ -	\$ 3,962,598	45%	0%	45%
CARE Rate Discount	\$ 404,343,437	\$ -	\$ 404,343,437	\$ 55,885,774	\$ -	\$ 55,885,774	\$ 276,105,887	\$ -	\$ 276,105,887	68%	0%	68%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 413,165,693	\$ -	\$ 413,165,693	\$ 57,149,172	\$ -	\$ 57,149,172	\$ 280,068,486	\$ -	\$ 280,068,486	68%	0%	68%
Other CARE Rate Benefits												
- DWR Bond Charge Exemption				\$2,067,059		\$ 2,067,059	\$10,980,110		\$ 10,980,110			
- CARE Surcharge Exemption				\$3,157,654		\$ 3,157,654	\$18,620,522		\$ 18,620,522			
- California Solar Initiative Exemption				\$ -		\$ -	\$ -		\$ -			
- kWh Surcharge Exemption				\$ -		\$ -	\$ -		\$ -			
- Vehicle Grid Integration Exemption				\$ -		\$ -	\$ -		\$ -			
Total Other CARE Rate Benefits				\$ 5,224,713	\$ -	\$ 5,224,713	\$ 29,600,632	\$ -	\$ 29,600,632			
Indirect Costs				\$ 92,560	\$ -	\$ 92,560	\$ 566,093	\$ -	\$ 566,093			

[1] Decision 15-12-047 transitioned from CHANGES pilot to CHANGES program and funding for the effort is captured herein.

[2] Reflects the authorized 2021 H1 bridge funding amounts.

[3] Monthly and year-to-date expenses data was obtained from SAP database.

NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration
Southern California Edison
Through June 2022

	New Enrollment										Recertification ^{7,8}				Attrition (Drop Offs)					Enrollment		Total CARE Participants	Estimated CARE Eligible	Enrollment ⁷ Rate % (W/X)	Total Residential Accounts	Gas Only	Electric Only	
	Automatic Enrollment				Self-Certification (Income or Categorical)				Total New Enrollment (E+J)	Scheduled ⁵	Non-Scheduled (Duplicates) ⁵	Automatic	Total Recertification (L+M+N)	No Response ^{4,7}	Failed PEV	Failed Recertification ^{7,8}	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)								
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation													Combined (F+G+H+I)							
January	687	2	0	689	8,158	5,225	10,172	186	23,741	24,430	14,305	1,051	0	15,356	51	2	19	78,262	78,334	39,786	-53,904	1,348,032	1,276,922	106%	4,573,551		4,573,551	
February	734	26	0	760	8,212	12,214	10,119	195	30,740	31,500	10,545	794	0	11,339	36	6	10	68,407	68,459	42,839	-36,959	1,311,125	1,276,922	103%	4,582,068		4,582,068	
March	222	6	0	228	7,804	9,205	12,373	226	29,608	29,836	7,326	655	0	7,981	13	1	5	69,674	69,693	37,817	-39,857	1,271,287	1,276,922	100%	4,581,468		4,581,468	
April	239	6	0	245	7,680	3,768	8,525	199	20,172	20,417	10,110	878	0	10,988	6	0	2	36,895	36,903	31,405	-16,486	1,254,809	1,276,922	98%	4,580,375		4,580,375	
May	178	1	0	179	7,462	1,846	7,236	300	16,844	17,023	12,699	1,060	0	13,759	2	2	7	24,383	24,394	30,782	-7,371	1,247,449	1,276,922	98%	4,591,558		4,591,558	
June	160	266	0	426	10,336	2,309	9,317	274	22,236	22,662	4,909	481	0	5,390	1	0	2	50,174	50,177	28,052	-27,515	1,219,937	1,276,922	96%	4,604,299		4,604,299	
July																												-
August																												-
September																												-
October																												-
November																												-
December																												-
YTD Total	2,220	307	0	2,527	49,652	34,567	57,742	1,380	143,341	145,868	59,894	4,919	0	64,813	109	11	45	327,795	327,960	210,681	-182,092	1,219,937	1,276,922	96%	4,604,299		4,604,299	

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 Recertification results are tied to the month initiated. Therefore, recertification results may be pending due to the time permitted for a participant to respond.

⁵ Recertification results include volumes for COVID-19 protections and reinstatements.

⁶ Penetration Rate and Enrollment Rate are the same value.

⁷ The total number of Recertifications requested is correct, however, due to known issue with data reporting in the customer database system, recertification volumes are lower than the average number in previous years. SCE is working to correct this issue, but will continue to experience lower than average volumes for at least one year or more until the update is made. Customers have not been negatively impacted because of this issue.

⁸ Total Recertifications volumes are based on program enrollment status (enrolled/de-enrolled).

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

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

Southern California Edison

Through June 2022

Month	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible)	Total Households De-enrolled	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-enrolled
January	1,348,032	0	0.0%	0	0	0	0.0%	0.0%
February	1,311,125	0	0.0%	0	0	0	0.0%	0.0%
March	1,271,287	186	0.0%	166	0	166	89.2%	0.0%
April	1,254,809	0	0.0%	0	0	0	0.0%	0.0%
May	1,247,449	5,712	0.5%	182	4	186	3.3%	0.0%
June	1,219,937	6,743	0.6%	160	1	161	2.4%	0.0%
July			0.0%			0	0.0%	0.0%
August			0.0%			0	0.0%	0.0%
September			0.0%			0	0.0%	0.0%
October			0.0%			0	0.0%	0.0%
November			0.0%			0	0.0%	0.0%
December			0.0%			0	0.0%	0.0%
YTD Total	1,219,937	12,641	1.0%	508	5	513	4.1%	0.0%

¹ Includes all customers who failed SCE'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.

⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD

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

Southern California Edison

Through June 2022

Month	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible)	Total Households De-enrolled	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-enrolled
January	1,348,032	7,499	0.6%	6,632	4	6,636	88.5%	0.5%
February	1,311,125	7,289	0.6%	6,501	9	6,510	89.3%	0.5%
March	1,271,287	1,527	0.1%	1,335	1	1,336	87.5%	0.1%
April	1,254,809	1,062	0.1%	840	0	840	79.1%	0.1%
May	1,247,449	2,405	0.2%	1,579	3	1,582	65.8%	0.1%
June	1,219,937	2,406	0.2%	33	0	33	1.4%	0.0%
July								
August								
September								
October								
November								
December								
YTD Total	1,219,937	22,188	1.8%	16,920	17	16,937	76.3%	1.4%

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.

⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 4 - Enrollment by County
Southern California Edison
Through June 2022

County	Estimated Eligible Households ^{1,4}			Total Households Enrolled ²			Enrollment Rate ³		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Fresno	633	0	633	53	0	53	8%	0%	8%
Imperial	0	282	282	24	52	76	0%	18%	27%
Inyo	9	1,362	1,371	23	970	993	256%	71%	72%
Kern	13,428	17,886	31,314	9,380	13,412	22,792	70%	75%	73%
Kings	0	7,611	7,611	67	8,364	8,431	0%	110%	111%
Los Angeles	501,121	2,884	504,005	505,757	2,004	507,761	101%	69%	101%
Madera	2	0	2	0	0	0	0%	0%	0%
Mono	0	2,292	2,292	8	807	815	0%	35%	36%
Orange	200,645	0	200,645	162,517	0	162,517	81%	0%	81%
Riverside	83,702	79,988	163,690	87,026	91,983	179,009	104%	115%	109%
San Bernardino	193,062	43,828	236,890	185,484	35,811	221,295	96%	82%	93%
San Diego	0	1	1	0	1	1	0%	100%	100%
Santa Barbara	14,824	0	14,824	9,779	0	9,779	66%	0%	66%
Tulare	12,323	37,874	50,197	11,837	41,064	52,901	96%	108%	105%
Ventura	60,710	2,452	63,162	51,707	1,807	53,514	85%	74%	85%
Total	1,080,459	196,460	1,276,919	1,023,662	196,275	1,219,937	95%	100%	96%

¹ As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 14, 2022.

² Total Households Enrolled includes submeter tenants.

³ Penetration Rate and Enrollment Rate are the same value.

⁴ Does not tie to Hi Level estimate (~3) due to rounding.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 5 - Recertification Results
Southern California Edison
Through June 2022

Month	Total CARE Households	Households Requested to Recertify ^{1,6}	% of Households Total (C/B)	Households Recertified ^{2,5,6,7}	Households De-enrolled ^{3,6,7}	Recertification Rate % ⁴ (E/C)	% of Total Households De-enrolled (F/B)
January	1,348,032	15,532	1.2%	14,819	70	95.4%	0.0%
February	1,311,125	11,566	0.9%	11,079	46	95.8%	0.0%
March	1,271,287	8,434	0.7%	8,191	18	97.1%	0.0%
April	1,254,809	13,049	1.0%	10,988	8	84.2%	0.0%
May	1,247,449	14,968	1.2%	13,759	29	91.9%	0.0%
June	1,219,937	6,908	0.6%	5,390	3	78.0%	0.0%
July							
August							
September							
October							
November							
December							
YTD	1,219,937	70,457	5.8%	64,226	174	91.2%	0.01%

¹ Excludes count of customers recertified through the probability model.

² Recertification results are tied to the month initiated and the recertification process allows customers 90 days to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.

³ Includes customers who did not respond or who requested to be de-enrolled.

⁴ Percentage of customers recertified compared to the total participants requested to recertify in that month.

⁵ Recertification results include volumes for COVID-19 protections and reinstatements.

⁶ The total number of Recertifications requested is correct, however, due to known issue with data reporting in the customer database system, recertification volumes are lower than the average number in previous years. SCE is working to correct this issue, but will continue to experience lower than average volumes for at least one year or more until the update is made. Customers have not been negatively impacted because of this issue.

⁷ Total Recertifications volumes are based on program enrollment status (enrolled/de-enrolled).

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 6 - Capitation Contractors¹
Southern California Edison
Through June 2022

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date ²
2-1-1 ORANGE COUNTY		x			5	98
ALPHA ENTERPRISES		x			-	-
APAC SERVICE CENTER	x				6	29
ARMENIAN RELIEF SOCIETY	x				-	-
ASIAN AMERICAN DRUG ABUSE PROG	x				-	-
ASIAN AMERICAN RESOURCE CENTER	x		x		-	4
ASIAN YOUTH CENTER	x				-	-
BEST PARTNERS	x				233	1,145
BETHEL BAPTIST CHURCH	x				-	-
DELHI CENTER	x				-	-
BETHEL BAPTIST CHURCH	x				-	-
BISHOP PAIUTE TRIBE	x				-	-
C.O.R. COMM DEVELOPMENT CORP	x				-	-
CAREGIVERS VOLUNTEERS ELDERLY		x			-	-
CHINESE CHRISTIAN HERALD CRUS.	x				-	-
CHINO NEIGHBORHOOD HOUSE		x			-	-
CITIHOUSING REAL ESTATE SERVIC		x			-	-
CITY IMPACT	x				-	-
CITY OF BEAUMONT SENIOR CENTER		x	x		-	-
COMMUNITY HEALTH INITIATIVE of OC		x			-	-
DESERT COMMUNITY ENERGY		x			-	-
DESERT MANNA MINISTRIES INC	x				-	-
DISABLED RESOURCES CTR, INC		x	x		-	6
EL CONCILIO DEL CONDADO DE	x		x		-	-
FAMILY SVC ASSOC OF REDLANDS	x				-	-
FOOD SHARE	x				-	-
GO THE CALENDAR		x			-	-
GRID ALTERNATIVES INLAND EMPIRE INC			x		10	10
HELP OF OJAI, INC.	x				-	-
HOUSING AUTHORITY OF KINGS CO	x		x		-	-
INLAND SOUTHERN CALIFORNIA 211+	x	x			11	48
KERNVILLE UNION SCHOOL DISTRIC	x				-	-
KINGS COMMUNITY ACTION ORG	x				-	-
KINGS CTY COMMISSION ON AGING	x				-	-
LA COUNTY HOUSING AUTHORITY		x			-	-

LEAGUE OF CALIF HOMEOWNERS	X				-	-
LIFT TO RISE	X				-	-
LTSC COMM. DEVEL. CORP	X				-	1
MENIFEE VALLEY CHAMBER OF COMMERCE		X			-	-
MEXICAN AMERICAN OPPORTUNITY		X	X		-	-
MTN COMM FAM RESOURCE CNTR	X				-	-
NEW GREATER CIR. MISSION, INC	X				-	-
NEW HOPE VILLAGE, INC	X				-	-
NEW HORIZONS CAREGIVERS GROUP		X			-	1
OCCC	X				-	-
OPERATION GRACE	X				-	-
OUR COMMUNITY WORKS	X				9	34
PACIFIC ISLANDER HLTH (PIHP)	X				-	-
PACIFIC PRIDE FOUNDATION	X				-	-
RIVERSIDE DEPT COMM ACTION		X	X	X	-	-
SALVATION ARMY SANTA FE SPGS	X				-	-
SALVATION ARMY VISALIA CORPS	X				-	-
SANTA ANITA FAMILY SERVICE	X				-	-
SENIOR ADVOCATES OF THE DESERT	X				-	-
SHARE OUR SELVES	X				-	-
SHIELDS FOR FAMILIES	X	X			-	4
SMILES FOR SENIORS FOUND.	X				-	-
SOUTHEAST CITIES SERVICE CTR.		X			-	-
SOUTHEAST COMMUNITY DEVELOPMEN	X				-	-
ST VINCENT DE PAUL		X			-	-
THE CAMBODIAN FAMILY	X				-	-
UNITED CAMBODIAN COMMUNITY INC		X			-	-
VICTOR VALLEY COMM SVC COUNCIL	X				-	-
VIETNAMESE COMMUNITY OF OC INC	X				-	-
VOLUTNEERS OF EAST LOS ANGELES	X		X		-	-
XFINITI SOLUTIONS, LLC		X			-	-
Total Enrollments					274	1,380

¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.

² Numbers reflect customers that have been placed on the rate YTD. Capitation payments may lag by a month or more depending on when SCE is invoiced by the contractors.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Program Table 7 - Expenditures for Pilots and Studies
Southern California Edison
Through June 2022

2022	Authorized 2021-2026 Budget			Current Month Expenses			Year to Date Expenses			Cycle to Date Expenses [1]		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots												
CARE Outbound Calling Pilot	\$ 80,000	\$ -	\$ 80,000	\$ 230		\$ 230	\$ 230	\$ -	\$ 230	\$ -	\$ -	\$ -
Studies												
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study [2]	\$ 75,000	\$ -	\$ 75,000	\$ 5,830	\$ -	\$ 5,830	\$ 43,080	\$ -	\$ 43,080	\$ 69,181	\$ -	\$ 69,181
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study	\$ 75,000	\$ -	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study	\$ 75,000	\$ -	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Joint IOU - Statewide CARE-ESA Categorical Study	\$ 22,500	\$ -	\$ 22,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Joint IOU - CHANGES Evaluation [3]	\$ 120,000	\$ -	\$ 120,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Studies	\$ 367,500	\$ -	\$ 367,500	\$ 5,830	\$ -	\$ 5,830	\$ 43,080	\$ -	\$ 43,080	\$ 69,181	\$ -	\$ 69,181

[1] Some studies cover multiple cycles. Hence this column total reflects the total study spending (as opposed to cycle spending)

[2] Advice letter approved Joint Utilities' 2022 LINA Study for \$500,000. SCE holds the statewide contract for this co-funded study. This report includes ONLY SCE portion of the totals. SCE is cross-billing the other IOUs, but may currently hold more of the total project expense until bills are reconciled. SCE's 30% allocation is \$150,000, funded 50/50 via the ESA and CARE budgets. The 2022 LINA commenced in January 2021. The Joint Utilities would carry over committed, unspent 2021 LINA funding forward to 2022 and until the study is completed.

[3] CHANGES Evaluation is not part of EM&V budget, but funded out of CARE budget as part of the CHANGES program. The evaluation commenced in February 2022. Opinion Dynamics is the evaluation consultant. PG&E holds the contract. SCE pays 30% if the study cost. SCE has not yet been cross-billed by PG&E.

NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 8
CARE and Disadvantage Communities Enrollment Rate for Zip Codes
Southern California Edison
Through June 2022

Total CARE Households Enrolled				
Month	CARE Enrollment Rate for Zip Codes that have 10% or more disconnections	CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG)	CARE Enrollment Rate for Zip Codes in High Poverty (with 70% or Less CARE Penetration)	CARE Enrollment Rate for DAC (Zip/Census Tract) Codes in High Poverty (with 70% or Less CARE Enrollment Rate)
January				
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				
YTD				

Note:

Data is not available and table will be populated at a later time
Penetration Rate and Enrollment Rate are the same value.

DACs are defined at the census tract level. Corresponding zip codes are provided for the purpose of this table; however, the entire zip code listed may not be considered a DAC.

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 8A

CARE Top 10 Lowest Enrollment Rates in High Disconnection, High Poverty, and DAC Communities by Zip Code Southern California Edison Through June 2022

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes that have 10% or more Disconnections
ZIP00001	
ZIP00002	
ZIP00003	
ZIP00004	
ZIP00005	
ZIP00006	
ZIP00007	
ZIP00008	
ZIP00009	
ZIP00010	

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG)
ZIP00001	
ZIP00002	
ZIP00003	
ZIP00004	
ZIP00005	
ZIP00006	
ZIP00007	
ZIP00008	
ZIP00009	
ZIP00010	

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in DAC
ZIP00001	
ZIP00002	
ZIP00003	
ZIP00004	
ZIP00005	
ZIP00006	
ZIP00007	
ZIP00008	
ZIP00009	
ZIP00010	

Note:

Data is not available and table will be populated at a later time

Some zip codes rolled up to the nearest zip code for privacy reasons due to the number of people residing in that zip code.

DACs are defined at the census tract level. Corresponding zip codes are provided for the purpose of this table; however, the entire zip code listed may not be considered a DAC.

FERA Table 1 - FERA Program Expenses
Southern California Edison
Through June 2022

	Authorized Budget	Current Month Expenses	Year to Date Expenses	% of Budget Spent YTD
FERA Program:	Electric	Electric	Electric	Electric
Outreach	\$ 665,695	\$ 126,244	\$ 484,135	73%
Processing / Certification Re-certification	\$ 382,745	\$ -	\$ -	0%
Post Enrollment Verification	\$ 120,867	\$ -	\$ -	0%
IT Programming	\$ 30,000	\$ 503	\$ 4,021	13%
Pilot(s)	\$ -	\$ -	\$ -	0%
Studies	\$ 24,000	\$ -	\$ -	0%
Regulatory Compliance	\$ 15,445	\$ -	\$ -	0%
General Administration	\$ 43,153	\$ 1,866	\$ 13,820	32%
CPUC Energy Division	\$ 4,375	\$ -	\$ -	0%
SUBTOTAL MANAGEMENT COSTS	\$ 1,286,280	\$ 128,613	\$ 501,976	39%
FERA Rate Discount	\$28,746,536	\$ 956,077	\$ 4,781,012	17%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 30,032,816	\$ 1,084,690	\$ 5,282,988	18%
Indirect Costs		\$ 611	\$ 3,965	

NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

FERA Table 2 - Enrollment, Recertification, Attrition, & Penetration
Southern California Edison
Through June 2022

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment		Total FERA Participants	Estimated FERA Eligible	Enrollment ⁵ Rate % (W/X)
	Automatic Enrollment				Self-Certification (Income or Categorical)					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)			
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)															
January	0	0	0	0	353	88	185	0	626	626	123	13	0	136	1	0	0	1,539	1,540	762	-914	28,380	221,674	13%
February	0	0	0	0	341	225	127	0	693	693	111	11	0	122	3	0	0	1,392	1,395	815	-702	27,681	221,674	12%
March	0	0	0	0	319	159	213	3	694	694	96	10	0	106	0	0	0	1,934	1,934	800	-1,240	26,441	221,674	12%
April	0	0	0	0	310	79	169	1	559	559	126	14	0	140	0	0	0	813	813	699	-254	26,187	221,674	12%
May	0	0	0	0	291	27	125	2	445	445	138	14	0	152	0	0	0	588	588	597	-143	26,044	221,674	12%
June	0	0	0	0	335	20	146	0	501	501	55	3	0	58	0	0	0	1,187	1,187	559	-686	25,358	221,674	11%
July																								
August																								
September																								
October																								
November																								
December																								
YTD Total	0	0	0	0	1,949	598	965	6	3,518	3,518	649	65	0	714	4	0	0	7,453	7,457	4,232	-3,939	25,358	221,674	11%

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.

⁵ Penetration Rate and Enrollment Rate are the same value.

⁶ The total number of Recertifications requested is correct, however, due to known issue with data reporting in the customer database system, recertification volumes are lower than the average number in previous years. SCE is working to correct this issue, but will continue to experience lower than average volumes for at least one year or more until the update is made. Customers have not been negatively impacted because of this issue.

⁷ Total Recertifications volumes are based on program enrollment status (enrolled/de-enrolled).

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

FERA Table 3A - Post-Enrollment Verification Results (Model)

Southern California Edison

Through June 2022

Month	Total FERA Households Enrolled	Households Requested to Verify	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible)	Total Households De-enrolled	% De-enrolled through Post Enrollment Verification	% of Total FERA Households De-enrolled
January	28,380	0	0.0%	0	0	0	0.0%	0.0%
February	27,681	0	0.0%	0	0	0	0.0%	0.0%
March	26,441	3	0.0%	1	0	1	33.3%	0.0%
April	26,187	0	0.0%	0	0	0	0.0%	0.0%
May	26,044	133	0.5%	0	0	0	0.0%	0.0%
June	25,358	0	0.0%	0	0	0	0.0%	0.0%
July								
August								
September								
October								
November								
December								
YTD Total	25,358	136	0.5%	1	0	1	0.7%	0.0%

¹ Includes all customers who failed SCE'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.

⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD

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

Southern California Edison

Through June 2022

Month	Total FERA Households Enrolled	Households Requested to Verify	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible)	Total Households De-enrolled	% De-enrolled through Post Enrollment Verification	% of Total FERA Households De-enrolled
January	28,380	14	0.05%	5	0	5	35.7%	0.0%
February	27,681	10	0.04%	5	0	5	50.0%	0.0%
March	26,441	56	0.21%	50	0	50	89.3%	0.2%
April	26,187	3	0.01%	0	0	0	0.0%	0.0%
May	26,044	11	0.04%	0	0	0	0.0%	0.0%
June	25,358	0	0.00%	0	0	0	0.0%	0.0%
July								
August								
September								
October								
November								
December								
YTD Total	25,358	94	0.4%	60	0	60	63.8%	0.2%

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

⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD

FERA Table 4 - Enrollment by County
Southern California Edison
Through June 2022

County	Estimated Eligible Households ^{1,4}			Total Households Enrolled ²			Enrollment Rate ³		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Fresno	54	0	54	2	0	2	4%	0%	4%
Imperial	0	2	2	0	0	0	0%	0%	0%
Inyo	1	155	156	0	17	17	0%	11%	11%
Kern	1,665	2,217	3,882	169	199	368	10%	9%	9%
Kings	0	1,690	1,690	0	160	160	0%	9%	9%
Los Angeles	87,868	506	88,374	9,427	103	9,530	11%	20%	11%
Madera	0	0	0	0	0	0	0%	0%	0%
Mono	0	456	456	0	22	22	0%	5%	5%
Orange	30,801	0	30,801	4,015	0	4,015	13%	0%	13%
Riverside	16,418	15,689	32,107	1,926	2,425	4,351	12%	15%	14%
San Bernardino	32,937	7,477	40,414	3,802	733	4,535	12%	10%	11%
San Diego	0	0	0	0	0	0	0%	0%	0%
Santa Barbara	2,331	0	2,331	194	0	194	8%	0%	8%
Tulare	2,201	6,766	8,967	224	664	888	10%	10%	10%
Ventura	11,956	483	12,439	1,229	47	1,276	10%	10%	10%
Total	186,232	35,441	221,673	20,988	4,370	25,358	11%	12%	11%

¹ As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2021.

² Total Households Enrolled includes submeter tenants.

³ Penetration Rate and Enrollment Rate are the same value.

⁴ Does not tie to Hi Level estimate (~1) due to rounding.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD

FERA Table 5 - Recertification Results
Southern California Edison
Through June 2022

Month	Total FERA Households	Households Requested to Recertify ^{1,6}	% of Households Total (C/B)	Households Recertified ^{2,5,6,7}	Households De-enrolled ^{3,6,7}	Recertification Rate % ⁴ (E/C)	% of Total Households De-enrolled (F/B)
January	28,380	136	0.5%	134	1	98.5%	0.0%
February	27,681	122	0.4%	118	3	96.7%	0.0%
March	26,441	106	0.4%	106	0	100.0%	0.0%
April	26,187	140	0.5%	140	0	100.0%	0.0%
May	26,044	152	0.6%	152	0	100.0%	0.0%
June	25,358	58	0.2%	50	0	86.2%	0.0%
July							
August							
September							
October							
November							
December							
YTD	25,358	714	2.8%	700	4	98.0%	0.02%

¹ Excludes count of customers recertified through the probability model.

² Recertification results are tied to the month initiated and the recertification process allows customers 90 days to respond to the recertification request.

³ Includes customers who did not respond or who requested to be de-enrolled.

⁴ Percentage of customers recertified compared to the total participants requested to recertify in that month.

⁵ Recertification results include volumes for COVID-19 protections and reinstatements.

⁶ The total number of Recertifications requested is correct, however, due to known issue with data reporting in the customer database system, recertification volumes are lower than the average number in previous years. SCE is working to correct this issue, but will continue to experience lower than average volumes for at least one year or more until the update is made. Customers have not been negatively impacted because of this issue.

⁷ Total Recertifications volumes are based on program enrollment status (enrolled/de-enrolled).

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

FERA Table 6 - Capitation Contractors¹
Southern California Edison
Through June 2022

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date ²
2-1-1 ORANGE COUNTY		X			-	-
ALPHA ENTERPRISES		X			-	-
APAC SERVICE CENTER	X				-	-
ARMENIAN RELIEF SOCIETY	X				-	-
ASIAN AMERICAN DRUG ABUSE PROG	X				-	-
ASIAN AMERICAN RESOURCE CENTER	X		X		-	-
ASIAN YOUTH CENTER	X				-	-
BEST PARTNERS	X				-	1
BETHEL BAPTIST CHURCH	X				-	-
DELHI CENTER	X				-	-
BETHEL BAPTIST CHURCH	X				-	-
BISHOP PAIUTE TRIBE	X				-	-
C.O.R. COMM DEVELOPMENT CORP	X				-	-
CAREGIVERS VOLUNTEERS ELDERLY		X			-	-
CHINESE CHRISTIAN HERALD CRUS.	X				-	-
CHINO NEIGHBORHOOD HOUSE		X			-	-
CITIHOUSING REAL ESTATE SERVIC		X			-	-
CITY IMPACT	X				-	-
CITY OF BEAUMONT SENIOR CENTER		X	X		-	-
COMMUNITY HEALTH INITIATIVE of OC		X			-	-
DESERT COMMUNITY ENERGY		X			-	-
DESERT MANNA MINISTRIES INC	X				-	-
DISABLED RESOURCES CTR, INC		X	X		-	-
EL CONCILIO DEL CONDADO DE	X		X		-	-
FAMILY SVC ASSOC OF REDLANDS	X				-	-
FOOD SHARE	X				-	-
GO THE CALENDAR		X			-	-
GRID ALTERNATIVES INLAND EMPIRE INC			X		-	-
HELP OF OJAI, INC.	X				-	-
HOUSING AUTHORITY OF KINGS CO	X		X		-	-
INLAND SOUTHERN CALIFORNIA 211+	X	X			-	1
KERNVILLE UNION SCHOOL DISTRIC	X				-	-
KINGS COMMUNITY ACTION ORG	X				-	-
KINGS CTY COMMISSION ON AGING	X				-	-
LA COUNTY HOUSING AUTHORITY		X			-	-

LEAGUE OF CALIF HOMEOWNERS	X				-	-
LIFT TO RISE	X				-	-
LTSC COMM. DEVEL. CORP	X				-	-
MENIFEE VALLEY CHAMBER OF COMMERCE		X			-	-
MEXICAN AMERICAN OPPORTUNITY		X	X		-	-
MTN COMM FAM RESOURCE CNTR	X				-	-
NEW GREATER CIR. MISSION, INC	X				-	-
NEW HOPE VILLAGE, INC	X				-	-
NEW HORIZONS CAREGIVERS GROUP		X			-	-
OCCC	X				-	-
OPERATION GRACE	X				-	-
OUR COMMUNITY WORKS	X				-	-
PACIFIC ISLANDER HLTH (PIHP)	X				-	-
PACIFIC PRIDE FOUNDATION	X				-	-
PRM CONSULTING INC.	X	X	X		-	4
RIVERSIDE DEPT COMM ACTION		X	X	X	-	-
SALVATION ARMY SANTA FE SPGS	X				-	-
SALVATION ARMY VISALIA CORPS	X				-	-
SANTA ANITA FAMILY SERVICE	X				-	-
SENIOR ADVOCATES OF THE DESERT	X				-	-
SHARE OUR SELVES	X				-	-
SHIELDS FOR FAMILIES	X	X			-	-
SMILES FOR SENIORS FOUND.	X				-	-
SOUTHEAST CITIES SERVICE CTR.		X			-	-
SOUTHEAST COMMUNITY DEVELOPMEN	X				-	-
ST VINCENT DE PAUL		X			-	-
THE CAMBODIAN FAMILY	X				-	-
UNITED CAMBODIAN COMMUNITY INC		X			-	-
VICTOR VALLEY COMM SVC COUNCIL	X				-	-
VIETNAMESE COMMUNITY OF OC INC	X				-	-
VOLUTNEERS OF EAST LOS ANGELES	X		X		-	-
XFINITI SOLUTIONS, LLC		X			-	-
Total Enrollments					-	6

¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.

² Numbers reflect customers that have been placed on the rate YTD. Capitation payments may lag by a month or more depending on

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD