

**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

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

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**Dated: March 7, 2023**

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(U 338-E) ON LOW INCOME ASSISTANCE PROGRAMS FOR DECEMBER 2022**

Southern California Edison Company (SCE) hereby submits this amended monthly status report on its Family Electric Rate Assistance (FERA) Program, Energy Savings Assistance (ESA) and California Alternate Rate for Energy (CARE) program efforts for December 2022, which was filed pursuant to Decision (D.) 21-06-015. SCE is filing this amendment specifically for the purpose of updating the numbers in Table 2B of the December 2022 report. The prior calculation represented in this table inadvertently reported the number of properties treated instead of the number of individual units in the column highlighted in yellow below.

<b>Multifamily Properties Treated</b>	<b>Number</b>
<b>Total Number of Multifamily Properties Treated</b>	44
<b>Subtotal of Master-metered Multifamily Properties</b>	3
<b>Total Number of buildings w/in Properties Treated</b>	44
<b>Total Number of Multifamily Tenant Units w/in Properties Treated</b>	3979

The amended information is the only update to the report and supersedes the information submitted on January 23, 2023, and all the numbers herein supersede those previously reported.

Respectfully submitted,

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*/s/ Joshua Burk*

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Dated: March 7, 2023

**Attachment A**

**Amended FERA, ESA and CARE Program Report for December 2022**



**Southern California Edison Company**

**Energy Savings Assistance (ESA) Program,**

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

**Program, and**

**Family Electric Rate Assistance (FERA) Program**

**Amended Report for December 2022**

**(Originally filed January 23, 2023)**

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# AMENDED ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT<sup>1</sup>

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.<sup>2</sup> 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.<sup>3</sup> It provides information on CARE and ESA Program accomplishments and expenditures in 2022 up to and including December 31, 2022.

## 1. ESA PROGRAM EXECUTIVE SUMMARY

### 1.1 ESA Program Overview

The objective of Southern California Edison's (SCE) 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.

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<sup>1</sup> Table 2B of the attached appendix is being revised in this amendment, and the updated information supersedes the information submitted on January 23, 2023.

<sup>2</sup> D. 21-06-015 at 472, Ordering Paragraph (OP) 3, and at 490-491, OP 82.

<sup>3</sup> *Ibid.*



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

<b>ESA (SF, MH, MF In-Unit) Program Summary Expenses for 2022</b>			
	<b>2022 Authorized / Planning Assumptions<sup>4</sup></b>	<b>Actual to Date</b>	<b>%</b>
Budget	\$63,719,040	\$56,120,540	88%
Homes Treated	27,051	35,646	132%
kWh Saved	18,788,420	18,082,438	96%
kW Demand Reduced	7,147	2,687	38%
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 by July 2023.

In December 2022, SCE conducted the 2023 Energy Savings Assistance Program Workshop. This workshop was attended by the ESA Core Program Contractors, Equipment Vendors, Inspection Agencies, and other stakeholders that will be working in SCE’s ESA Program for the 2023 - 2026 program cycle. The goals of the 3-day workshop were to:

- Get to know program partners and stakeholders
- Review program basics
- Coordinate program transition
- Know program strategy
- Learn about program changes
- Raise and discuss any program concerns

The following table tracks the actual-to-date expenses for the ESA MF Common Area Measures (CAM) program compared to the annual budget assumption and the actual-to-date kWh saved.

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<sup>4</sup> 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.

ESA MF CAM Program Summary Expenses for 2022			
	2022 Authorized / Planning Assumptions	Actual to Date	%
Budget	\$1,800,000	\$1,724,371	96%
Properties Treated	N/A	44	N/A
kWh Saved	N/A	1,385,607	N/A
kW Demand Reduced	N/A	33.98	N/A
Therms Saved	N/A	N/A	N/A

**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 10 projects. The budget has been allocated for these projects and SCE continues to accept new MF CAM projects. SCE plans to continue running MF CAM until the MFWB Program is open to participation in 2023.

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

Master Agreement Report Southern California Edison Sign Date from 1/1/2017 to 12/31/2022						
# Projects In Progress	# of Authorized Units		# Projects In Progress	# Projects In Progress	# of Authorized Units	
10	2849		1	0	0	
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
37	3388	1060	24	24	1723	559
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	0	0	
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	34	1810	589

<b>ESA Pilot Plus and Pilot Deep Summary Expenses for (2022)</b>			
	<b>2022 Authorized / Planning Assumptions</b>	<b>Actual to Date</b>	<b>%</b>
Budget	\$ 3,884,864	\$ 294,373	8%
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/Deep:**

ESA Program Pilot Plus/Deep (PP/D), also known as ESA Whole Home, 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 completed a competitive solicitation to select a single third-party Program Implementer to deliver PP/D gas and electric program services and an implementer has been selected and has begun their implementation process design work. Additionally, SCE concluded all respective solicitations for the Pilot for both Implementation and Evaluation. Customer contact began on December 20, 2022 and the implanter is in process of setting up appointments for enrollment and assessments to begin commencing mid to late January 2023.

<b>ESA Building Electrification Pilots Summary Expenses for 2022</b>			
	<b>2022 Authorized / Planning Assumptions</b>	<b>Actual to Date</b>	<b>%</b>
Budget	\$4,087,060	\$153,267	4%
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 income qualified customers living in single family homes located in disadvantaged communities (DACs). BE Pilot retrofits primarily consist of space and water heating to reduce the overall energy operating costs and greenhouse gas (GHG) emissions of customers currently using natural gas or propane to support some of their energy needs. Limited numbers of homes may receive additional electrification measures, such as induction cooking equipment and efficient clothes dryer. In August 2022, an implementer for the BE Pilot was selected, and the contract signed. SCE and the implementer are working on plans which include policies and procedures for a successful launch of the pilot in Q1 2023. In September 2022, a research consultant that will perform the BE Pilot evaluation was selected, and the contract signed. The kick-off meeting with the consultant was held on November 1, 2022. The consultant is developing an evaluation plan that can be implemented prior to the initial BE Pilot implementation.

ESA Clean Energy Homes Pilot Summary Expenses for (2022)			
	2022 Authorized / Planning Assumptions	Actual to Date	%
Budget	\$1,810,000	\$37,298	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 Clean Energy Homes Pilot (if applicable):**

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 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 Q2 2023. In September 2022, a successful candidate was selected, and the contract signed with the research consultant who will evaluate the CEH Pilot. The evaluation consultant was expected to be on boarded Q4 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.<sup>5</sup> There was one measure change established this month to take effect January 1, 2023: a temporary hold on attic insulation in areas requiring permits.

New Attic Insulation Installation building code standards went into effect on January 1, 2023. These were discussed at the Policy & Procedures and Installations Standards Sub-Working Group (PP/IS SWG) Ad Hoc meeting, held on December 7, 2022. Richard Heath and Associates (RHA) presented the existing attic insulation requirements, an overview of the new building code requirements by climate zone, and the implications of these new California Energy Commission (CEC) new requirements on the ESA Program.

ESA Program impacts include:

- Increase in measure cost
- Decrease in cost effectiveness
- Addition of a new measure (sealing protocol)
- Reduced number of households served
- Reimbursement rate changes and budget modifications

The SWG agreed that more assessment of the impacts of these factors is required and will be undertaken in early 2023. In the meantime, the SWG agreed to modify the IS Manual language for Attic Insulation to read as follows:

- Come January 1, 2023, in jurisdictions that require a permit to install attic insulation, temporarily make attic insulation non-feasible until the IOUs have assessed the program impact of the new building code requirements and developed a solution for moving forward. During this assessment period, contractors would:
  - Continue to install attic insulation using the existing IS Manual criteria for those non-permitted jobs, and
  - Not seal the attic floor (as now required by the CEC) on those feasible, non-permitted jobs.
- Once a resolution has been made, each IOU may allow contractors to return to those that were non-feasible because a permit was required.

The IOUs will ensure ‘heads-up’ communications are sent to contractors as soon as possible.

This hold is not expected to significantly impact SCE’s ESA Program operations. SCE’s ESA contractors typically install attic insulation in fewer than five (electrically heated) homes per year.

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<sup>5</sup> D.21-06-015 at 486, OP 69.

To better manage the program year 2022 budget and address operational constraints, SCE decided to temporarily suspend new installations of various measures. This decision was made to optimize the measure mix to maximize savings and improve cost-effectiveness during program ramp down and for the remaining months of the year. SCE communicated these programmatic changes during an all-contractor program update webinar on March 1st, 2022. SCE presented that the installation of the following measures will be temporarily suspended: Weatherization, Freezers, Outdoor Porch Light Fixtures, Washing Machines, Efficient Fan Controllers (EFC), Room Air Conditioners, and Standalone Smart Thermostats in non-hot climate zones. SCE also communicated that contractors should continue to assess for these measures so that we have a record for possible delivery at some point in the future if budget allows for the work to be completed. SCE sent a subsequent communication memo to contractors on September 9<sup>th</sup>, 2022 stating that Weatherization services were inadvertently added to the suspended measures list and that Weatherization measures should continue to be offered to customers and provided when feasible.

SCE seeks to continue to optimize portfolio energy savings by installing high energy saving measures while balancing all programmatic objectives. Measures such as Room Air Conditioners and Standalone Smart Thermostats in non-hot climate zones were temporarily suspended due to the low savings they contribute. Freezers, Outdoor Porch Light Fixtures, Washing Machines, and Efficient Fan Controllers (EFC) are measures that are procured by the contractors themselves and not bulk purchased by SCE. SCE decided to suspend these measures so that contractors will not have to pay for them upfront and run the risk of not depleting their inventory by the end of the year.

During the 4<sup>th</sup> quarter of 2022, SCE has assigned some of these measures to contractors to complete installations. This was done to deplete existing inventory and continue work while waiting for other measure deliveries.

## **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.

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

SCE has retained one Service Provider to complete enrollments for CARE High Usage customers and Emergency Disaster Relief through the end of 2022. Leads SCE has obtained from these activities are assigned to the Service Provider to contact. The tablet PC process is used for these enrollments.

#### **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 December, 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.

The ESA program has moved to a waitlist approach for interested customers for the remaining months in 2022. SCE communicated these programmatic changes during an all contractor program update webinar on June 9th, 2022. SCE sent a subsequent communication memo to contractors on July 7th, 2022 which included the approved verbiage contractors were asked to use when customers contact them directly regarding enrollment within the ESA Program. Waitlisted customers are those who have expressed interest to enroll via our call center or online interest form. A contractor visit has not been scheduled, customer documents have not been submitted and no measures have been provided. Currently, SCE's call center representatives communicate the ESA Program funding status and advise customers that if funding becomes available, they will be contacted to schedule an assessment. Additionally, this message is displayed on SCE.com for those customers seeking ESA Program information online. Waitlisted customers from 2022 will be provided as leads to the ESA contractors as they start to ramp up in January 2023. Please reference the Direct Marketing section below for the quantities of these leads in the month of December.

The 2022 ESA budget is fully committed with remaining budget sufficient to cover the installations for existing ESA enrolled customers. SCE is taking initiatives to address operational constraints and to mitigate overspending by phasing out new ESA enrollments. SCE engaged with enrollment contractors through one on one meetings during the first week of August to discuss plans to cease new ESA enrollments by September 1, 2022. SCE used these meetings to

seek feedback and provide detail on plans to review contractor spend and rebalance budgets to avoid under/overspending. Once SCE met with all enrollment contractors, a communication memo was sent on August 10<sup>th</sup>, 2022 detailing the timeline and activities for ceasing enrollment activities by September 1st, 2022. As of September 1, 2022, new ESA enrollments have ceased and SCE continues to utilize the waitlist for interested customers.

SCE sent a letter to approximately 17,000 customers who had been eligible for the installation of an energy saving measure, however, the installation was never completed because the contractor was not able to contact the customer. The letter encouraged the customer to call the ESA contractor to schedule the appointment for installation of the measure before the end of the year. This effort was aimed at driving additional installation work to the ESA contractors as well as helping SCE work towards the energy saving goal for 2022.

In order to continue to serve SCE customers, waitlist customers will be offered alternative energy efficiency program offerings to help them save energy. The customers may still opt to wait to enroll in the ESA program once funding becomes available in 2023. These programs include:

- Residential Direct Install (RDI)
- Comprehensive Manufactured Homes Program (CMHP)
- Summer Reliability Program (SRP)





 FPO   
 <<Customer Name>>  
 <<Customer Mailing Address>>  
 <<City, State ZIP Code>>

Valarie Hernandez  
Principal Manager, Customer Care  
Southern California Edison

### **ESA Building Electrification Pilots (if applicable)**

Competitive solicitations for the BE Pilot have been completed, a contract has been signed as of August 2022. SCE and the 3rd party selected to implement the BE Pilot are working to begin the process of ramping-up for a successful launch of the pilot.

Competitive solicitations for the CEH Pilot have been completed and a contract has been signed. Contracts have been signed for both the Implementation and Evaluation processes and the respective vendors have begun working with SCE on their respective tasks.

### **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.

<b>Language</b>	<b>Number of Calls</b>
Vietnamese	13
Korean	1

### **Tribal Outreach**

SCE's tribal liaisons began engaging tribal leaders to offer mini grants. SCE secured one-on-one meetings with six tribes and will continue to outreach to tribal nations throughout SCE's service territory.

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

<b>Tribal Nations in SCE's Territory: Outreach Status</b>	<b>Treated</b>	<b>Refused</b>	<b>In progress</b>
Timbisha Shoshone	X		
Chemehuevi	X		
San Manual 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 December, no online advertising was conducted by the ESA Program.

##### **Social Media**

In the month of December, 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 December.

- **Direct Mail** — The ESA Program did not conduct any direct mail campaigns in the month of December.
- **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 December, SCE received about 67 ESA-related internet leads that were added to the SCE waitlist.

An illustration of the ESA webpage is shown below:

**Quick Services** ▲

**Your Home** —

Demand Response

Rebates, Incentives & Saving Tips ▲

Help Paying Your Bill —

FERA & CARE Discounted Rates

One-Time Bill Assistance

**Energy Savings Assistance Program**

Medical Baseline Allowance

Home Efficiency Guide ▲

Electric Vehicles ▲

Generating Your Own Power ▲

Energy Education Centers ▲

Residential Rate Plans ▲

**Your Business** ▲

**Customer Support** ▲

**Partners & Vendors** ▲

**Outage Center** ▲

**Energy Savings Assistance Program.**

[Home](#) > [Your Home](#) > [Help Paying Your Bill](#) > [Energy Savings Assistance Program](#)

**Are You Eligible for Free Appliances?**

The Energy Savings Assistance program is designed to help you conserve energy and save money. Income-qualified customers may be eligible to receive energy-efficient appliances at no charge or a minimal charge.

- In some instances, a copayment may be required.
- If you qualify, we'll cover the costs—including installation—of new energy-efficient appliances.

At this time, participation in the Energy Savings Assistance program is currently waitlisted due to limited funding. Interested customers may call 1-800-736-4777 to provide their information should funding become available. Customers may be contacted for enrollment and assessment scheduling.

[Apply Now >](#) [Check Your Enrollment Status >](#)

**Does Your Household Qualify?**

To be eligible for the program, you must meet the qualifications:

- Be a homeowner or renter who receives electric services through a residential meter
- Have an active SCE service account
- Meet the program eligibility requirements, including the installation requirements
- Meet either of the qualifications listed below

You can easily see if your eligible. There are two ways to qualify:

- **Outbound Calls** —SCE continued to leverage CARE's High Usage customers whose usage was identified as exceeding 400% to 600% (or more) above the baseline. In December, the ESA Program referred approximately 9 of these customers to an SCE contractor as leads to enroll these households into the ESA Program and provide energy-saving services. The customers continue to have the choice 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 has moved 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 December, SCE received approximately 1,130 ESA related calls from interested customers that were placed on the waitlist.

SCE continues to offer income qualified Customer Emergency Protections. When a customer contacts SCE to self-identify as being impacted as a result of a disaster occurring in SCE’s service territory, which can be a fire, earthquake, storm, heat wave, etc. SCE educates customers about the ESA program and, if interested, SCE can deploy an ESA contractor to their home to confirm ESA Program qualification and assist in the enrollment process. In the month of December, SCE received approximately 7 calls of this nature and referred the customer lead to a contractor for enrollment and assessment scheduling.

- **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 1<sup>st</sup>, 2022.

### **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 December.

SCE’s Income Qualified Programs (IQP) and Foodservice Technology Center (FTC)<sup>6</sup> 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**

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

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<sup>6</sup> FTC conducts energy-efficiency studies and demonstrations related to commercial foodservice equipment and technologies for restaurants and foodservice facilities.

### **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.

#### **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 in low-income and disadvantaged communities.

In December 2022, approximately 757 individuals from these organizations are working in support of SCE's ESA Program with one new person being added to the roles. These numbers will be updated in January 2023 as a result of closing out and removing personnel for the roster as a result of them no longer having contracts with SCE.

As of December 31, 2022, SCE has approximately 136 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 December 2022, SCE removed inactive users from the system; there are now approximately 230 active users. For December 2022, a total of 32-courses were completed, accounting for approximately 32 hours of learning.

Due to low system usage, the CBT Learning System was sunset at the expiration of the current contract on December 12, 2022.

SCE continues to encourage ESA Contractors to take advantage of Workforce Education & Training Resources. SCE's Energy Education Centers (EEC) located in Irwindale and Tulare, CA offer a wide range of low-cost and free resources for ESA contractors. In November 2022, EEC calendars were shared with all ESA Contractors and Vendors; all were encouraged to take advantage of the free and low-cost offerings that were being made available.

In November 2022, SCE will coordinate training opportunities at both EEC's. This training will in partnership with TECH Clean California and will provide training on Heat Pump Water Heaters (HPWH) to help advance the state's mission to achieve carbon neutrality by 2045 while also assisting SCE's network of contractors learn new and valuable job skills that they can immediately put into practice. The November 8, 2022 session was conducted in Tulare, CA with 15 persons participating. The next session will be facilitated in January 2023 in Irwindale, CA.

We will continue to utilize SCE's local WE&T Integrated Energy Education & Training subprogram as a valuable resource to develop curriculum tailored to supporting ESA contractors. Additionally, SCE will coordinate with the Technical

Upskill Trainings WE&T sub program to provide opportunities for incumbent workers in energy efficiency related jobs/careers. In conjunction with these efforts, SCE will engage with our partners at PG&E to explore the SW Energize Careers subprogram that aims to create a diverse and representational energy workforce; the Energize Careers Program provides holistic services to support disadvantaged workers through technical training, job placement, and wrap-around service support.



## **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 data collection has been completed and the consultant is conducting additional analyses and drafting the report. The study was completed in December. The final report and appendices are available on both the CALMAC site and the CPUC's Public Documents Area [2022 LINA Appendicies 120922 FINAL \(calmac.org\)](https://calmac.org/2022_LINA_Appendicies_120922_FINAL) [2022 LINA Report 120922 FINAL \(calmac.org\)](https://calmac.org/2022_LINA_Report_120922_FINAL)

#### **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. Evergreen Economics has been selected as the research consultant. A public workshop was held on August 31, 2022. During December, the consultant completed most of the analyses of the programs and provided preliminary results. The consultant expects to provide draft results for review in Q1 2023.

#### **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 was completed in September 2022. A public workshop was held on September 7, 2022 to present the findings. The final report was posted to CALMAC and Energy Division's public documents area (PDA) in October 2022.

#### **1.4.2 ESA BE Program Pilots**

##### **ESA Pilot Plus and Pilot Deep**

Competitive Solicitations has been completed for both implementation and evaluation. Administrative activities were underway for both Implementation and Evaluation preparing for the final stages of the launch; on December 20, 2022 the implementer began making the 1<sup>st</sup> customer contacts.

##### **ESA Building Electrification (BE) Pilot**

Competitive solicitations for the BE Pilot have been completed, a contract has been signed as of August 2022. SCE and the 3rd party selected to implement the BE Pilot are working to begin the process of ramping-up for a successful launch of the pilot.

##### **ESA Clean Energy Homes (CEH) Pilot**

SCE is finalizing the contract for the 3rd party selected to implement the CEH Pilot. A Notice to Proceed from the Association for Energy Affordability was issued on December 2, 2022 so the implementer can proceed with planning and work towards implementation.

## 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.

### 2.1 CARE Program Summary

#### 2.1.1 Please provide CARE Program summary costs.

<b>CARE Budget Categories</b>	<b>Authorized Budget</b>	<b>Expenses Year-to-Date</b>	<b>% of 2022 Budget Spent</b>
Outreach	\$3,724,630	\$3,228,078	87%
Processing / Certification Re-certification	\$1,530,979	\$1,227,364	83%
Post Enrollment Verification	\$483,467	\$661,415	137%
IT Programming	\$570,000	\$29,873	5%
Pilots	\$-	\$-	0%
CHANGES Program	\$525,000	\$490,735	93%
Studies	\$36,000	\$68,286	190%
Regulatory Compliance	\$478,809	\$221,129	46%
General Administration	\$1,337,746	\$1,194,025	89%
CPUC Energy Division	\$135,625	\$118,816	88%
Total Expenses	<b>\$8,822,256</b>	<b>\$7,289,721</b>	83%
Subsidies and Benefits	<b>\$404,343,437</b>	<b>\$666,223,958</b>	165%
Total Program Costs & Discounts	<b>\$413,165,693</b>	<b>\$673,513,680</b>	163%

### **2.1.2 Provide the CARE Program enrollment rate to date.**

<b>CARE Enrollment</b>		
<b>Participants Enrolled</b>	<b>Eligible Participants<sup>7</sup></b>	<b>Enrollment Rate</b>
1,165,186	1,276,922	91%

## **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 December, approximately 190,000 e-mails were sent out for CARE and approximately 148,000 direct mail pieces were sent to potential CARE applicants. See an illustration of a sample marketing piece below.

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<sup>7</sup> 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.



YOU COULD SAVE AN  
AVERAGE OF \$33 ON YOUR  
MONTHLY ENERGY BILL



«Date»

«Customer Name»  
«Mailing Address »  
«City, State Zip+4»  
«BAR CODE»

### Help for Couples and Households of Two or More

At Southern California Edison (SCE), we understand household expenses can add up quickly. That's why, last year, we helped customers save an average of \$33 a month on their electricity bills when they enrolled in the **California Alternate Rates for Energy (CARE)** program.<sup>1</sup> That's money that can be used toward other important things in life, such as saving for the future or sharing experiences with loved ones.

#### Lower your electric bill by up to 30%.

With CARE, you'll receive up to a 30% discount on your electric bill each month. Qualifying for CARE depends on household income and household size (see chart at right). Or, you may qualify if anyone in your household participates in one of the public assistance programs shown on the enclosed application.

#### Applying is fast and simple.

It takes just two minutes to complete and return the enclosed application in the postage-paid envelope provided. Or, if you prefer, apply online at [sce.com/care](https://sce.com/care).



#### Did you know?

SCE and the State of California offer more ways to save or receive bill assistance. The following programs may be beneficial to you.

#### FERA

Don't qualify for CARE? Our **Family Electric Rate Assistance (FERA)** program can help eligible households of three or more receive an 18% discount on electric bills. Apply for FERA at [sce.com/fera](https://sce.com/fera).

#### AMP

Customers enrolled in our CARE/FERA programs with qualifying past-due bills may be able to participate in our **Arrearage Management Plan (AMP)**. AMP will forgive **up to \$8,000** in eligible late payments. Apply for AMP at [sce.com/amp](https://sce.com/amp).

**California Lifeline** is a state program that provides discounted home phone and cell phone services to eligible households. To see if you qualify, visit [californialifeline.com](https://californialifeline.com).

**California Emerging Technology Fund (CETF)** provides eligible households with low-cost internet and computers. Find out how at [everyoneon.org/getconnected](https://everyoneon.org/getconnected) or call 1-866-519-8655.

#### Maximum Household Income

Effective June 1, 2021

Persons in Household	Total Combined Annual Income <sup>1</sup>
1 – 2	Up to \$34,840
3	Up to \$43,920
4	Up to \$53,000
5	Up to \$62,080
6	Up to \$71,160
7	Up to \$80,240
8	Up to \$89,320
Each additional person	\$9,080

<sup>1</sup> Current gross (before taxes) household income from all sources. Households of three or more persons with higher incomes that do not qualify for CARE, may qualify for the Family Electric Rate Assistance program.

#### Our Commitment to Customers

SCE offers many cost-saving programs and payment-plan options that are secure, accessible, and easy to understand. Applying for programs does not affect the immigration status of you or anyone in your household. Learn more at [sce.com/findsupport](https://sce.com/findsupport).

<sup>1</sup> Southern California Edison Companies (U338-E) Low Income Annual Report for Program Year 2020

Income qualified programs are funded by California utility ratepayers and administered by Southern California Edison under the auspices of the California Public Utilities Commission. Programs are subject to change without notice. Terms and conditions apply.

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### **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](http://sce.com). Customers may also find additional resources and assistance beyond SCE/IOU programs. SCE continually updates [sce.com/billhelp](http://sce.com/billhelp) and [sce.com/findsupport](http://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](http://sce.com/billhelp) which directs customers to [everyoneon.org/getconnected](http://everyoneon.org/getconnected)

An illustration of the Billing Assistance Programs page on [sce.com](http://sce.com) appears below.

Quick Services ▲

Your Home —

Demand Response

Rebate, Incentives & Saving Tip ▲

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.

### **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 67 CARE/FERA Capitation Agencies which help income-qualified customers gain assistance through the CARE and FERA programs. In December capitation contractors and outbound calling efforts successfully enrolled 167 new customers in the CARE/FERA Program<sup>8</sup>. 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.

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<sup>8</sup> The figure for new enrollees in the CARE/FERA program will be entered once the data is obtained and this will be corrected in an amendment.



### **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 December, 238 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, and recertifications were allowed to resume in October 2021. During the month of December, SCE received twenty-one recertification complaints of which three were resolved and closed. At the end of December 2022, there were a total of eighteen 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
8/31/2022	Fairview Fire	Riverside
9/16/2022	Tropical Storm Kay	Multiple Counties
11/19/2022	Route Fire	Los Angeles

### 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 following 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

## 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 has been completed as of December 9 and the final report and appendices are available on The California Measurement Advisory Council (CALMAC) website as well as the CPUC's Public Documents Area (PDA) [i2022\\_LINA\\_Appendicies\\_120922\\_FINAL](#) (calmac.org) [2022\\_LINA\\_Report\\_120922\\_FINAL](#) (calmac.org)

### **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. Evergreen Economics has been selected as the research consultant. A public workshop on the draft research plan was held on August 31, 2022. The consultant expects to provide draft results for review in Q1 2023.

### **CARE CHANGES Evaluation**

The CHANGES program will have two 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, and the evaluation consultant was selected in December 2021. Opinion dynamics was selected to evaluate the project. During the first quarter of 2022 the study team and the evaluator discussed potential adjustments to the submitted scope prior to finalizing the full research plan. Opinion Dynamics and CHANGES stakeholder team have finalized the survey and recruiting lists in anticipation of fielding during Q1 2023. Other study activities including an assessment of CBO data gaps and population and cost-benefit analysis are expected during Q1, 2023.

### **2.5.2 CARE Program Pilot (Outbound PEV Pilot)**

SCE has been meeting with the other statewide IOUs to simultaneously conduct a coordinated nine-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 1<sup>st</sup>. An SCE representative is calling customers who have submitted incomplete verification documentation sets to inform them of what they need to complete the request and answer any questions the customer may have.

### 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.

**Please provide FERA Program summary costs.**

The following table provides the FERA budget ad expenses by category.<sup>9</sup>

<b>FERA Budget Categories</b>	<b>Authorized Budget</b>	<b>Expenses Year-to-Date</b>	<b>% of 2022 Budget Spent</b>
Outreach	\$665,695	\$807,225	121%
Processing / Certification Re-certification	\$382,745	\$30,463	8%
Post Enrollment Verification	\$120,867	\$13,849	11%
IT Programming	\$30,000	\$7,036	23%
Pilot(s)	\$-	\$-	0%
Studies	\$24,000	\$-	0%
Regulatory Compliance	\$15,445	\$-	0%
General Administration	\$43,153	\$18,254	42%
CPUC Energy Division	\$4,375	\$-	0%
<b>Total Expenses</b>	<b>\$1,286,280</b>	<b>\$876,827</b>	<b>68%</b>
<b>Subsidies and Benefits</b>	<b>\$28,746,536</b>	<b>\$11,482,677</b>	<b>40%</b>
<b>Total Program Costs &amp; Discounts</b>	<b>\$30,032,816</b>	<b>\$12,359,504</b>	<b>41%</b>

com

**Provide the FERA Program enrollment rate to date.**

<b>FERA Enrollment</b>		
<b>Participants Enrolled</b>	<b>Eligible Participants</b>	<b>Enrollment Rate</b>
26,112	221,674	12%

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<sup>9</sup> FERA budget reflects what was authorized in D.21-06-015 at 472, OP 1.

## 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 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 distinguishes 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<sup>10</sup>. 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.

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<sup>10</sup> D.21-06-015, OP 24.

## 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 December, approximately 145,000 emails were sent out for FERA and approximately 49,000 direct mail pieces were sent to potential FERA applicants. See illustrations of the marketing pieces below.




Energy for What's Ahead®

«Date»

«Customer Name»  
«Mailing Address »  
«City, State Zip+4»  
«BAR CODE»

### YOU COULD SAVE AN AVERAGE OF \$34 ON YOUR MONTHLY ENERGY BILL



#### Help for Families and Households of Three or More

At Southern California Edison (SCE), we understand household expenses can add up quickly. That's why, last year, we helped customers save an average of \$34 a month on their electricity bills through our **Family Electric Rate Assistance (FERA)** program.<sup>1</sup> That's money that can be saved for the future or used for other household or family needs.

**Lower your electric bill by 18% every month.**  
Once enrolled in FERA, you'll receive a discount of 18% on each monthly bill. Qualifying for FERA depends on household income and household size (see chart at right).

**Applying is fast and simple.**  
It takes just two minutes to complete and return the enclosed application in the postage-paid envelope provided. Or, if you prefer, apply online at [sce.com/fera](https://sce.com/fera).

**Maximum Household Income**  
Effective June 1, 2022

Persons in Household	Total Combined Annual Income <sup>1</sup>
1 – 2	Not eligible
3	\$46,061 - \$57,575
4	\$55,501 - \$69,375
5	\$64,941 - \$81,175
6	\$74,381 - \$92,975
7	\$83,821 - \$104,775
8	\$93,261 - \$116,575
Each additional person	\$9,440 - \$11,800

<sup>1</sup>Current gross (before taxes) household income from all sources. Households with lower incomes that do not qualify for FERA may qualify for the California Alternate Rates for Energy (CARE) program.

**Did you know?**  
SCE and the State of California offer more ways to save or receive bill assistance. The following programs may be beneficial to you.

**AMP**  
Customers enrolled in our CARE/FERA programs with qualifying past-due bills may be able to participate in our **Arrearage Management Plan (AMP)**. AMP will forgive up to \$8,000 in eligible late payments. Apply for AMP at [sce.com/amp](https://sce.com/amp).

**Our Commitment to Customers**  
SCE offers many cost-saving programs and payment-plan options that are secure, accessible, and easy to understand. Applying for programs does not affect the immigration status of you or anyone in your household. Learn more at [sce.com/findsupport](https://sce.com/findsupport).

**California Lifeline** is a state program that provides discounted home phone and cell phone services to eligible households. To see if you qualify, visit [californialifeline.com](https://californialifeline.com) or call 1-866-272-0349.

**California Emerging Technology Fund (CETF)** provides eligible households with low-cost internet and computers. Find out how at [everyoneon.org/getconnected](https://everyoneon.org/getconnected) or call 1-866-519-8655.

<sup>1</sup>Estimated savings based on current calculations for Program Year 2021.  
Income-qualified programs are funded by California utility ratemakers and administered by Southern California Edison under the auspices of the California Public Utilities Commission. Programs are subject to change without notice. Terms and conditions apply.  
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## 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	1
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 December.

## 3.4 Pilots and Studies

### 3.4.1 FERA Program Studies

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. Evergreen Economics was selected as the research consultant. A public workshop on the draft research plan was held on August 31, 2022. The consultant expects to provide draft results for review in Q1 2023.

### 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**

**Energy Savings Assistance Program Table - Summary Expenses**  
**Southern California Edison**  
**Through December 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)	\$ 63,719,040		\$ 63,719,040	\$ 3,118,715		\$ 3,118,715	\$ 56,120,540		\$ 56,120,540	88%		88%
ESA Multifamily In-Unit	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
ESA Multifamily Common Area Measures	\$ 1,800,000		\$ 1,800,000	\$ 266,218		\$ 266,218	\$ 1,724,371		\$ 1,724,371	96%		96%
ESA Multifamily Whole Building	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
ESA Pilot Plus and Pilot Deep	\$ 3,884,864		\$ 3,884,864	\$ 291,900		\$ 291,900	\$ 294,373		\$ 294,373	8%		8%
Building Electrification Retrofit Pilot	\$ 4,087,060		\$ 4,087,060	\$ 78,867		\$ 78,867	\$ 153,267		\$ 153,267	4%		4%
Clean Energy Homes New Construction Pilot	\$ 1,810,000		\$ 1,810,000	\$ 10,302		\$ 10,302	\$ 37,298		\$ 37,298	2%		2%
CSD Leveraging	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
<b>ESA Program TOTAL</b>	<b>\$ 75,300,964</b>		<b>\$ 75,300,964</b>	<b>\$ 3,766,002</b>		<b>\$ 3,766,002</b>	<b>\$ 58,329,850</b>		<b>\$ 58,329,850</b>	<b>77%</b>		<b>77%</b>

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

Appliances	Authorized Budget [1]			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	\$ 38,151,624		\$ 38,151,624									
AL 4702-E Approved Budget [2]	\$ 14,727,388		\$ 14,727,388									
Appliances				\$ 682,007		\$ 682,007	\$ 14,390,781		\$ 14,390,781			
Customer Enrollment				\$ 5,024		\$ 5,024	\$ 2,883,617		\$ 2,883,617			
Domestic Hot Water				\$ 47		\$ 47	\$ 5,820		\$ 5,820			
Enclosure				\$ 130		\$ 130	\$ 16,627		\$ 16,627			
HVAC				\$ 1,105,415		\$ 1,105,415	\$ 27,946,015		\$ 27,946,015			
In Home Education				\$ 1,375		\$ 1,375	\$ 846,950		\$ 846,950			
Lighting				\$ 68		\$ 68	\$ 960,154		\$ 960,154			
Miscellaneous [5]				\$ 190,223		\$ 190,223	\$ 3,293,282		\$ 3,293,282			
Pilot				\$ -		\$ -	\$ -		\$ -			
<b>Energy Efficiency TOTAL</b>	<b>\$ 52,879,012</b>		<b>\$ 52,879,012</b>	<b>\$ 1,984,289</b>		<b>\$ 1,984,289</b>	<b>\$ 50,343,247</b>		<b>\$ 50,343,247</b>	<b>95%</b>		<b>95%</b>
Training Center	\$ 600,650		\$ 600,650	\$ 23,323		\$ 23,323	\$ 57,099		\$ 57,099	10%		10%
Workforce Education and Training	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Inspections	\$ 1,677,406		\$ 1,677,406	\$ 113,134		\$ 113,134	\$ 1,091,185		\$ 1,091,185	65%		65%
Marketing and Outreach [4]	\$ 1,374,878		\$ 1,374,878	\$ 132,193		\$ 132,193	\$ 343,019		\$ 343,019	25%		25%
Studies	\$ 225,000		\$ 225,000	\$ 16,703		\$ 16,703	\$ 85,707		\$ 85,707	38%		38%
Regulatory Compliance	\$ 691,730		\$ 691,730	\$ 19,808		\$ 19,808	\$ 538,096		\$ 538,096	78%		78%
General Administration	\$ 6,218,785		\$ 6,218,785	\$ 818,037		\$ 818,037	\$ 3,611,267		\$ 3,611,267	58%		58%
CPUC Energy Division	\$ 51,579		\$ 51,579	\$ 11,229		\$ 11,229	\$ 50,921		\$ 50,921	99%		99%
SPOC	\$ 171,929		\$ 171,929	\$ 13		\$ 13	\$ (456)		\$ (456)	0%		0%
<b>TOTAL PROGRAM COSTS</b>	<b>\$ 63,719,040</b>		<b>\$ 63,719,040</b>	<b>\$ 3,118,715</b>		<b>\$ 3,118,715</b>	<b>\$ 56,120,540</b>		<b>\$ 56,120,540</b>	<b>88%</b>		<b>88%</b>
<b>Funded Outside of ESA Program Budget</b>												
Indirect Costs				\$ 90,034		\$ 90,034	\$ 1,038,009		\$ 1,038,009			
NGAT Costs												

[1] Reflects the authorized 2022 Program Year budget approved in CPUC Decision 21-06-015, June 13, 2021. Includes ESA Core budget only. BE Pilot budgets reflected in Table 1A.

[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] The charges for the December 2021 accrual have been reversed as of October, 2022.

[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 activity

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 December 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	\$ 266,218		\$ 266,218	\$ 1,724,371		\$ 1,724,371	96%		96%
ESA Multifamily Whole Building	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
<b>ESA Program (Multifamily)TOTAL</b>	<b>\$ 1,800,000</b>		<b>\$ 1,800,000</b>	<b>\$ 266,218</b>		<b>\$ 266,218</b>	<b>\$ 1,724,371</b>		<b>\$ 1,724,371</b>	<b>96%</b>		<b>96%</b>

[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	\$ 291,900		\$ 291,900	\$ 294,373		\$ 294,373	8%		8%
<b>TOTAL</b>	<b>\$ 3,884,864</b>		<b>\$ 3,884,864</b>	<b>\$ 291,900</b>		<b>\$ 291,900</b>	<b>\$ 294,373</b>		<b>\$ 294,373</b>	<b>8%</b>		<b>8%</b>

[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	\$ 4,087,060		\$ 4,087,060	\$ 78,867	\$ -	\$ 78,867	\$ 153,267		\$ 153,267	4%		4%
<b>TOTAL</b>	<b>\$ 4,087,060</b>		<b>\$ 4,087,060</b>	<b>\$ 78,867</b>	<b>\$ -</b>	<b>\$ 78,867</b>	<b>\$ 153,267</b>		<b>\$ 153,267</b>	<b>4%</b>		<b>4%</b>

[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	\$ 1,810,000		\$ 1,810,000	\$ 10,302	\$ -	\$ 10,302	\$ 37,298		\$ 37,298	2%		2%
<b>TOTAL</b>	<b>\$ 1,810,000</b>		<b>\$ 1,810,000</b>	<b>\$ 10,302</b>	<b>\$ -</b>	<b>\$ 10,302</b>	<b>\$ 37,298</b>		<b>\$ 37,298</b>	<b>2%</b>		<b>2%</b>

[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%
<b>TOTAL</b>	<b>\$ -</b>		<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>		<b>\$ -</b>	<b>0%</b>		<b>0%</b>

[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 Program Table 2 (SF, MH, MF In-Unit)**  
**Southern California Edison**  
**Through December 2022**

	ESA Program (Summary)Total						
		Year-To-Date Completed & Expensed Installation					
Measures	Units	Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
<b>Appliances</b>							
High Efficiency Clothes Washer	Home	25	2,441	0		\$ 25,642	0.1%
Refrigerators	Home	10,223	5,971,066	717		\$ 14,191,331	28.2%
Clothes Dryer	Each	-	-	-		\$ -	0.0%
Dishwasher	Each	-	-	-		\$ -	0.0%
Freezer	Each	199	168,752	20		\$ 173,808	0.3%
<b>Domestic Hot Water</b>							
Faucet Aerator	Each	-	-	-		\$ -	0.0%
Other Domestic Hot Water	Home	95	5,406	1		\$ 3,895	0.0%
Water Heater Tank and Pipe Insulation	Home	1	47	0		\$ 34	0.0%
Low-Flow Showerhead / Combined Showerhead/TSV	Home	-	-	-		\$ -	0.0%
Water Heater Repair/Replacement	Home	-	-	-		\$ -	0.0%
Heat Pump Water Heater	Each	-	-	-		\$ -	0.0%
Thermostatic Tub Spout/Diverter	Each	-	-	-		\$ -	0.0%
Thermostatic Shower Valve	Each	22	1,003	0		\$ 1,892	0.0%
New - Solar Water Heating	Each	-	-	-		\$ -	0.0%
<b>Enclosure[1]</b>							
Air Sealing / Envelope [1]	Home	95	6,566	1		\$ 14,160	0.0%
Caulking	Home	-	-	-		\$ -	0.0%
Diagnostic Air Sealing	Home	-	-	-		\$ -	0.0%
Attic Insulation	Home	2	430	0		\$ 2,468	0.0%
Floor Insulation	Home	-	-	-		\$ -	0.0%
<b>HVAC</b>							
Furnace Repair/Replacement	Home	-	-	-		\$ -	0.0%
Room A/C Replacement	Home	192	(29,637)	(4)		\$ 207,641	0.4%
Central A/C Replacement	Home	3,615	1,234,486	185		\$ 21,905,774	43.5%
Heat Pump Replacement	Home	73	92,458	42		\$ 438,524	0.9%
Evaporative Cooler (Replacement)	Each	-	-	-		\$ -	0.0%
Evaporative Cooler (Installation)	Home	2,812	1,576,971	237		\$ 3,652,282	7.3%
Duct Testing and Sealing	Home	3,421	-	-		\$ 715,040	1.4%
Efficient Fan Control	Home	47	3,206	2		\$ 14,805	0.0%
Prescriptive Duct Sealing	Home	-	-	-		\$ -	0.0%
Smart Thermostat	Each	3,215	889,549	-		\$ 1,011,949	2.0%
Portable A/C	Each	-	-	-		\$ -	0.0%
Central Heat Pump-FS (propane or gas space)	Each	-	-	-		\$ -	0.0%
Wholehouse Fan	Each	-	-	-		\$ -	0.0%
<b>Maintenance</b>							
Furnace Clean and Tune	Home	-	-	-		\$ -	0.0%
Central A/C Tune up	Home	-	-	-		\$ -	0.0%
Evaporative Cooler Maintenance	Home	-	-	-		\$ -	0.0%
Cold Storage	Each	-	-	-		\$ -	0.0%
<b>Lighting</b>							
Compact Fluorescent Lights (CFL)	Each	(4)	(69)	(0)		\$ (28)	0.0%
Exterior Hard wired CFL fixture	Each	-	-	-		\$ -	0.0%
Exterior Hard wired LED fixture	Each	87	1,271	-		\$ 8,124	0.0%
LED A-lamp	Each	83,212	3,220,076	391		\$ 738,826	1.5%
LED Torchiere Lamp	Each	2,886	206,360	24		\$ 203,518	0.4%
Torchiere	Each	-	-	-		\$ -	0.0%
LED Reflector Lamp	Each	1,186	25,263	3		\$ 9,714	0.0%
<b>Miscellaneous</b>							
Pool Pumps	Home	984	983,983	305		\$ 1,295,749	2.6%
Smart Power Strip - Tier 1	Home	22	(24)	(0)		\$ 1,198	0.0%
Smart Power Strip - Tier 2	Each	26,612	3,722,835	764		\$ 1,993,612	4.0%
Air Purifier	Home	-	-	-		\$ -	0.0%
Comprehensive Home Health and Safety Check-up	Home	-	-	-		\$ -	0.0%
CO and Smoke Alarm	Each	-	-	-		\$ -	0.0%
<b>Pilots</b>							
<b>Customer Enrollment</b>							
ESA Outreach & Assessment	Home	39,617	-	-		\$ 2,883,617	5.7%
ESA In-Home Energy Education	Home	33,877	-	-		\$ 846,950	1.7%
<b>Total Savings/Expenditures</b>			<b>18,082,438</b>	<b>2,687</b>		<b>\$ 50,340,524</b>	
Total Households Weatherized [2]		130					
<b>Households Treated</b>		Total					
- Single Family Households Treated	Home	25,181					
- Multi-family Households Treated (In-unit)	Home	8,274					
- Mobile Homes Treated	Home	2,191					
<b>Total Number of Households Treated</b>		Home	35,646				
<b># Eligible Households to be Treated for PY [3]</b>		Home	27,051				
<b>% of Households Treated</b>		%	132%				
- Master-Meter Households Treated	Home	1,783					

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs

[3] Based on authorized 2022 Program Year budget approved in CPUC decision 21-06-015, June 13, 2021.

[4] Savings are based on DNV/GL Impact Evaluation Program Years 2015-2017 for measures studied by that evaluation. Savings for all other measures are based on SCE or Statewide Work Papers.

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

Note: Any measures noted as 'NEW' have been added during the course of this program year.

Note: Any measures noted as 'REMOVED', are no longer offered by the program but have been kept for tracking purposes.

**Energy Savings Assistance Program Table 2A  
Southern California Edison  
Through December 2022**

Measures	Units	ESA Program - CSD Leveraging					
		Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses (\$)	% of Expenditure
<b>Appliances</b>							
High Efficiency Clothes Washer	Each						
Refrigerator	Each						
New - Clothes Dryer	Each						
New - Dishwasher	Each						
Freezers	Each						
<b>Domestic Hot Water</b>							
Faucet Aerator	Each						
Other Domestic Hot Water[3]	Home						
Water Heater Tank and Pipe Insulation	Home						
Water Heater Repair/Replacement	Home						
Low-Flow Showerhead / Combined Showerhead/TSV	Home						
Heat Pump Water Heater	Each						
Thermostatic Tub Spout/Diverter	Each						
Thermostatic Shower Valve	Each						
New - Solar Water Heating							
<b>Enclosure[1]</b>							
Air Sealing	Home						
Caulking	Home						
New - Diagnostic Air Sealing	Home						
Attic Insulation	Home						
New - Floor Insulation	Home						
<b>HVAC</b>							
Removed - FAU Standing Pilot Conversion	Each						
Furnace Repair/Replacement	Each						
Room A/C Replacement	Each						
Central A/C replacement	Each						
Heat Pump Replacement	Each						
Evaporative Cooler (Replacement)	Each						
Evaporative Cooler (Installation)	Each						
Duct Test and Seal	Home						
Energy Efficient Fan Control	Home						
New - Prescriptive Duct Sealing	Home						
High Efficiency Forced Air Unit (HE FAU)	Home						
Removed - A/C Time Delay	Home						
Smart Thermostat	Home						
New - Portable A/C	Each						
New - Central Heat Pump-FS (propane or gas space)							
New - Wholehouse Fan							
<b>Maintenance</b>							
Furnace Clean and Tune	Home						
Central A/C Tune up	Home						
New - Evaporative Cooler Maintenance	Home						
<b>Lighting</b>							
Removed - Interior Hard wired LED fixtures	Each						
Exterior Hard wired LED fixtures	Each						
Removed - LED Torchiers	Each						
Removed - Occupancy Sensor	Each						
Removed - LED Night Light	Each						
LED Reflector Bulbs	Each						
LED A-Lamps	Each						
<b>Miscellaneous</b>							
Pool Pumps	Each						
Power Strip	Each						
Power Strip Tier II	Each						
NEW - Air Purifier	Home						
Cold Storage	Each						
New - Comprehensive Home Health and Safety Check-up	Home						
New - CO and Smoke Alarm	Each						
<b>Pilots</b>							
<b>Customer Enrollment</b>							
ESA Outreach & Assessment	Home						
ESA In-Home Energy Education	Home						
<b>Total Savings/Expenditures</b>							
Total Households Weatherized [2]							
<b>CSD MF Tenant Units Treated</b>			<b>Total</b>				

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor  
[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.  
[3] Savings are based on DNV/GL Impact Evaluation Program Years 2015-2017 for measures studied by that evaluation. Savings for all other measures are based on SCE or Statewide Work Papers

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

Common Area Measures Category and Eligible Measures Title [1]	Effective Date	End Date[2]	Eligible Climate Zones [3]
<b>Appliances</b>			
Pool Pumps	10/1/2018	6/30/2021	All
<b>Domestic Hot Water</b>			
<b>Envelope</b>			
<b>Enclosure</b>			
Air Sealing / Envelope [1]	10/1/2018	6/30/2021	All
Attic Insulation	10/1/2018	6/30/2021	All
<b>HVAC</b>			
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
<b>Lighting</b>			
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
<b>Miscellaneous</b>			
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](https://www.energy.ca.gov/maps/renewable/building_climate_zones.html)

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

<b>Table 2B ESA Program - Multifamily Common Area Measures<sup>5</sup></b>								
<b>Year-To-Date Completed &amp; Expensed Installation</b>								
<b>ESA CAM Measures[1][6]</b>	<b>Units (of Measure such as "each")</b>	<b>Quantity Installed</b>	<b>Number of Units for Cap-kBTU/h and Cap-Tons</b>	<b>kWh (Annual)<sup>7</sup></b>	<b>kW (Annual)<sup>7</sup></b>	<b>Therms (Annual)</b>	<b>Expenses (\$)</b>	<b>% of Expenditure</b>
<b>Appliances</b>								
Freezer	Each	-		-	-		\$ -	0.0%
High Efficiency Clothes Washer	Home	-		-	-		\$ -	0.0%
Refrigerators	Each	2		1,212	0		\$ 2,752	0.2%
<b>Domestic Hot Water</b>								
Central Boiler	Cap-kBTU/h	-		-	-		\$ -	0.0%
Faucet Aerator	Each	-		-	-		\$ -	0.0%
Pipe Insulation	Home	-		-	-		\$ -	0.0%
<b>Envelope</b>								
								0.0%
								0.0%
<b>HVAC</b>								
AC Tune-up	Cap-Tons	-		-	-		\$ -	0.0%
Central A/C Replacement	Home	6		1,704	0.26		\$ 50,478	2.9%
MF Duct Test Inspection	Home	3		-	-		\$ 315	0.0%
Duct Testing and Sealing	Home	6		-	-		\$ 2,830	0.2%
Furnace Replacement	Cap-kBTU/h	-		-	-		\$ -	0.0%
HEAT Pump Split System	Cap-Tons	-		-	-		\$ -	0.0%
HEAT Pump Split System	Each	-		-	-		\$ -	0.0%
Heat Pump Replacement	Each	1		1,636	0.74		\$ 15,818	0.9%
Inspection	Each	17		-	-		\$ 3,570	0.2%
Programmable Thermostat	Each	-		-	-		\$ -	0.0%
Smart Thermostat	Each	32		8,306	-		\$ 7,675	0.4%
<b>Lighting<sup>8</sup></b>								
Exterior Parking Lot	Each	1,328		384,178	-		\$ 172,237	10.0%
LED A-Lamp	Each	791		180,809	3.59		\$ 8,683	0.5%
LED Exit Sign	Each	186		67,024	10.85		\$ 16,767	1.0%
Exterior LED Fixture	Each	6,956		368,333	-		\$ 857,652	49.7%
Interior LED Fixture	Fixture	5,598		123,218	14.32		\$ 521,810	30.3%
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	1,327		101,463	1.04		\$ 14,888	0.9%
LED Pool and Spa Lighting	Each	3		2,628	-		\$ 1,449	0.1%
LED Reflector Lamp	Each	279		2,724	0.03		\$ 1,824	0.1%
LED T-Lamp	Each	2,332		114,656	1.87		\$ 22,928	1.3%
<b>Miscellaneous</b>								
Tier-2 Smart Power Strip	Each	-		-	-		\$ -	0.0%
Pool Pumps	Home	3		27,717	1.16		\$ 7,310	0.4%
Variable Speed Pool Pump	Each	-		-	-		\$ -	0.0%
<b>MF CAM Enrollment Fees</b>								
Enrollment Fees	Homes	37		-	-		\$ 15,386	0.9%
<b>Ancillary Services</b>								
Audit		-		-	-		\$ -	0.0%
<b>Total</b>		<b>18,907</b>		<b>1,385,607</b>	<b>33.98</b>		<b>\$ 1,724,371</b>	

<b>Multifamily Properties Treated</b>	<b>Number</b>
<b>Total Number of Multifamily Properties Treated<sup>2</sup></b>	<b>44</b>
<b>Subtotal of Master-metered Multifamily Properties Treated</b>	<b>3</b>
<b>Total Number of Multifamily Tenant Units w/in Properties Treated<sup>3</sup></b>	<b>3,979</b>
<b>Total Number of buildings w/in Properties Treated<sup>4</sup></b>	<b>44</b>

<b>ESA Program - Multifamily Common Area</b>	<b>Year to Date Expenses</b>		
	<b>Electric</b>	<b>Gas</b>	<b>Total</b>
<b>Administration</b>			\$ -
<b>Direct Implementation (Non-Incentive)</b>			\$ -
<b>Direct Implementation</b>	\$ 1,724,371		\$ 1,724,371
<b>TOTAL MF CAM COSTS</b>	<b>\$ 1,724,371</b>	<b>\$ -</b>	<b>\$ 1,724,371</b>

<<Includes measures costs

- 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.
- Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings.
- This calculation has been amended to reflect the total number of units within the properties treated.
- Number of common area meters enrolled at the property.
- Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022, modified by D.17-12-009, where 65% of tenants are income eligible based (at or below 200% of the Federal Poverty Guidelines).
- Commissioning costs, as allowable per the Decision, are included in measures total cost unless otherwise noted.
- All savings are calculated based on SCE or Statewide Work Papers, or proxy values from most recent ESA Program Impact Evaluation for limited instances where no workpapers exist pending results from next impact evaluation including MF CAM measures
- 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 Program Table 2C Pilot Plus and Pilot Deep**  
**Southern California Edison**  
**Through December 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 reflect 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 December 2022**

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

Measures	Units	ESA Program - Clean Energy Homes New Construction Pilot [1]					
		Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
<b>Appliances</b>	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
<b>Domestic Hot Water</b>	Home	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
<b>Enclosure</b>	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
<b>HVAC</b>	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
<b>Maintenance</b>	Home	-	-	-	-	\$ -	0.0%
	Home	-	-	-	-	\$ -	0.0%
<b>Lighting</b>	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
<b>Miscellaneous</b>	Each	-	-	-	-	\$ -	0.0%
	Each	-	-	-	-	\$ -	0.0%
<b>Customer Enrollment</b>	Home	-	-	-	-	\$ -	0.0%
ESA Outreach & Assessment	Home	-	-	-	-	\$ -	0.0%
ESA In-Home Energy Education	Home	-	-	-	-	\$ -	0.0%
<b>Total Savings/Expenditures</b>			-	-	-	\$ -	0.0%
<b>Households Treated</b>	<b>Total</b>						
- Single Family Households Treated	Home						
- Mobile Homes Treated	Home						
<b>Total Number of Households Treated</b>	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 December 2022**

<b>Table 3A, ESA Program (SF, MH, MF In-Unit)</b>	
Annual kWh Savings	18,082,438
Annual Therm Savings	
Lifecycle kWh Savings	167,323,527
Lifecycle Therm Savings	
Current kWh Rate	\$ 0.14
Current Therm Rate	
Average 1st Year Bill Savings / Treated households	\$ 71
Average Lifecycle Bill Savings / Treated Household	\$ 652

<b>Table 3B, ESA Program - CSD Leveraging</b>	
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	\$ -

<b>Table 3C, ESA Program - Multifamily Common Area</b>	
Annual kWh Savings	1,385,607
Annual Therm Savings	
Lifecycle kWh Savings	9,690,143
Lifecycle Therm Savings	
Current kWh Rate	\$ 0.14
Current Therm Rate	
Average 1st Year Bill Savings / Treated Property	\$ 3,379
Average Lifecycle Bill Savings / Treated Property	\$ 23,630

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

Table 4A, ESA Program (SF, MH, MF In-Unit)						
	Eligible Households			Households Treated YTD		
County	Rural [1]	Urban	Total	Rural	Urban	Total
Fresno	0	799	799	0	0	0
Imperial	287	1	288	0	0	0
Inyo	1,607	232	1,839	0	0	0
Kern	20,062	18,672	38,734	1,005	2	1,007
Kings	8,824	1,185	10,009	364	0	364
Los Angeles	3,395	651,709	655,104	159	14,656	14,815
Madera	0	2	2	0	0	0
Mono	2,886	420	3,306	0	0	0
Orange	0	257,743	257,743	0	3,768	3,768
Riverside	93,260	124,229	217,489	847	4,278	5,125
San Bernardino	49,540	251,636	301,176	1,052	6,605	7,657
San Diego	1	0	1	0	0	0
Santa Barbara	0	21,161	21,161	0	7	7
Tulare	42,764	20,489	63,253	1,339	384	1,723
Ventura	2,948	82,712	85,660	58	1,122	1,180
<b>Total</b>	<b>225,574</b>	<b>1,430,990</b>	<b>1,656,564</b>	<b>4,824</b>	<b>30,822</b>	<b>35,646</b>

Table 4B, ESA Program - CSD Leveraging						
	Eligible Households			Households Treated YTD		
County	Rural	Urban	Total	Rural	Urban	Total
						0
						0
<b>Total</b>				<b>0</b>	<b>0</b>	<b>0</b>

Table 4C, ESA Program - Multifamily Common Area						
	Eligible Properties [2]			Properties Treated YTD		
County				Rural [1]	Urban	Total
Fresno				0	0	0
Imperial				0	0	0
Inyo				0	0	0
Kern				0	0	0
Kings				3	0	3
Los Angeles				0	7	7
Madera				0	0	0
Mono				0	0	0
Orange				0	5	5
Riverside				3	3	6
San Bernardino				9	7	16
San Diego				0	0	0
Santa Barbara				0	0	0
Tulare				7	0	7
Ventura				0	0	0
<b>Total</b>				<b>22</b>	<b>22</b>	<b>44</b>

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

[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.

**Energy Savings Assistance Program Table 5 - Energy Savings Assistance Program Customer Summary**  
**Southern California Edison**  
**Through December 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							4,042				1,607,903	249
February							10,601				4,631,533	709
March							16,889				7,264,292	1,113
April							22,298				9,501,880	1,447
May							27,930				11,743,054	1,784
June							31,883				13,707,244	2,078
July							32,988				14,659,527	2,209
August							34,196				15,597,920	2,340
September							34,689				16,114,446	2,401
October							34,986				16,824,240	2,499
November							35,365				17,546,489	2,600
December							35,646				18,082,438	2,687
YTD	-	-	-	-	-	-	35,646	-	-	-	18,082,438	2,687

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	# of Household Treated by Month	Gas & Electric			# of Household Treated by Month	Gas Only			# of Household Treated by Month	Electric Only			# of Household Treated by Month	Total		
		(Annual)				(Annual)				(Annual)				(Annual)		
		Therm	kWh	kW		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	# of Properties Treated by Month	Gas & Electric			# of Properties Treated by Month	Gas Only			# of Properties Treated by Month	Electric Only			# of Properties Treated by Month	Total		
		(Annual)				(Annual)				(Annual)				(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January									2		3,368	0.1	2		3,368	0.1
February									3		7,228	0.3	3		7,228	0.3
March									14		444,112	6.8	14		444,112	6.8
April									17		557,749	8.6	17		557,749	8.6
May									22		724,768	9.9	22		724,768	9.9
June									26		757,367	10.3	26		757,367	10.3
July									37		929,005	15.9	37		929,005	15.9
August									38		931,738	16.0	38		931,738	16.0
September									39		1,017,258	25.5	39		1,017,258	25.5
October									40		1,073,175	25.8	40		1,073,175	25.8
November									42		1,242,415	29.4	42		1,242,415	29.4
December									44		1,385,607	34.0	44		1,385,607	34.0
YTD	-	-	-	-	-	-	-	-	44		1,385,607	34.0	44		1,385,607	34.0

Table 5D, ESA Program - Pilot Plus and Pilot Deep [1]																
Month	# of Household Treated by	Gas & Electric			# of Household Treated by	Gas Only			# of Household Treated by	Electric Only			# of Household Treated by	Total		
		(Annual)				(Annual)				(Annual)				(Annual)		
		Therm	kWh	kW		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 December 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
<b>Pilots [7]</b>															
	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
<b>Total Pilots</b>	\$ -		\$ -			\$ -			\$ -			\$ -	0%		0%
<b>Studies</b>															
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study [3]	\$ 75,000		\$ 75,000	\$ 768		\$ 768	\$ 46,699		\$ 46,699	\$ 74,901		\$ 74,901	100%		100%
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%
<b>Total Studies</b>	<b>\$ 1,542,500</b>		<b>\$ 1,542,500</b>	<b>\$ 768</b>		<b>\$ 768</b>	<b>\$ 46,699</b>		<b>\$ 46,699</b>	<b>\$ 74,901</b>		<b>\$ 74,901</b>	<b>5%</b>		<b>5%</b>

[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.

[7] Please see ESA Table 1A-1 through 1A-3 and Summary tab for Pilot activities

**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 December 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
<b>Demographic</b>											
Housing Type											
SF	1,091,750	25,161	2.31%	10,389	242%		444.0	0.069			\$ 1,071
MH	119,960	2,191	1.84%	503	436%		435.2	0.060			\$ 1,008
MF In-Unit	442,786	8,274	1.87%	3,163	262%		340.8	0.049			\$ 502
Rent vs. Own											
Own	707,343	18,056	2.55%	7,081	255%		466.1	0.073			\$ 1,252
Rent	949,219	17,590	1.85%	6,974	252%		371.7	0.055			\$ 609
Previous		11,090		716	1549%		395.1	0.058			\$ 884
New Participant	27,051	24,556	90.78%	13,339	184%		430.6	0.060			\$ 957
Seniors	477,067	8,001	1.68%	3,008	266%		435.6	0.064			\$ 1,071
Veterans [5]	96,723		0.00%								
Hard-to-Reach [6]	1,352,338	31,638	2.34%	12,766	248%		421.7	0.064			\$ 957
Vulnerable [7]	603,866	17,208	2.85%	6,972	247%		389.6	0.058			\$ 782
<b>Location</b>											
DAC	577,425	20,877	3.62%	8,628	242%		389.6	0.059			\$ 732
Rural	254,023	6,209	2.44%	2,339	265%		527.5	0.081			\$ 1,907
Tribal [5]	8,832	528	5.98%	205	258%		473.2	0.066			\$ 1,351
PSPS Zone	635,632	441	0.07%	124	356%		508.4	0.079			\$ 898
Wildfire Zone	281,693	1,372	0.49%	125	1098%		534.1	0.083			\$ 1,101
Climate Zone 06	251,001	2,361	0.94%	988	239%		343.7	0.046			\$ 534
Climate Zone 08	391,005	9,139	2.34%	3,833	238%		327.2	0.047			\$ 449
Climate Zone 09	314,012	7,328	2.33%	2,966	247%		403.7	0.061			\$ 527
Climate Zone 10	353,775	9,684	2.74%	3,617	268%		446.8	0.073			\$ 701
Climate Zone 13	81,749	2,859	3.50%	1,162	246%		545.8	0.085			\$ 2,788
Climate Zone 14	170,693	2,515	1.47%	847	297%		577.8	0.083			\$ 2,691
Climate Zone 15	56,370	985	1.75%	310	318%		519.3	0.076			\$ 2,068
Climate Zone 16	37,635	775	2.05%	332	233%		442.9	0.069			\$ 681
CARB Communities [8]	186,716	6,215	3.33%	2,875	216%		361.0	0.054			\$ 490
<b>Financial</b>											
CARE	1,276,922	20,918	1.64%	8,237	254%		432.9	0.065			\$ 1,032
FERA	221,674	235	0.11%	102	230%		438.1	0.072			\$ 921
Disconnected [9]	-										
Arrearages	687,677	16,174	2.35%	6,870	235%		410.4	0.062			\$ 881
High Usage	69,406	354	0.51%	194	192%		513.6	0.085			\$ 1,076
High Energy Burden [10]	523,397	125	0.02%	44	284%		510.3	0.067			\$ 1,901
SEVI - Unknown [11]	N/A	278		100	278%		380.2	0.050			\$ 603
SEVI - HIGH (73.75+) [11]	657,481	11,799	1.79%	4,755	248%		393.0	0.058			\$ 841
SEVI - MEDIUM (57.21-73.75) [11]	752,969	11,773	1.56%	4,626	254%		414.3	0.061			\$ 930
SEVI - LOW (<=57.21) [11]	246,113	11,796	4.79%	4,574	258%		452.2	0.071			\$ 1,040
Affordability Ratio [12]	104,713	2,571	2.46%	1,004	256%		468.0	0.074			\$ 1,392
<b>Health Condition</b>											
Medical Baseline	26,355	1,021	3.87%	376	272%		495.9	0.078			\$ 1,427
Respiratory (Unknown) [13]	N/A	4		-			532.9	0.080			\$ 2,189
Respiratory - High (65.97+) [13]	585,015	11,868	2.03%	4,811	247%		422.0	0.063			\$ 1,045
Respiratory - Med (47.81-65.94) [13]	635,992	11,888	1.87%	4,693	253%		417.3	0.064			\$ 795
Respiratory - Low (<=47.79) [13]	435,556	11,886	2.73%	4,551	261%		419.3	0.064			\$ 964
Disabled	341,251	3,783	1.11%	1,481	255%		439.1	0.064			\$ 1,005

Customer Segments:

Notes:

[1] Athens eligibility estimates at 250 FPL as of June 2022 applied to customer segment population.

[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 and CY2022. Customers could also have been contacted multiple times within a year. They could also be contacted by other means, such as by

[4] SCE does not currently offer HCS measures

[5] Data for the Veterans segment is currently not being captured. SCE database/forms will be updated to collect Veterans and Tribal data, effective 2023. However, we are currently using data on Tribal areas obtained fr

Low-Income Energy Affordability Data Tool Map (<https://lead.openet.org>) which identifies Tribal areas by census tract location.

[6] "Hard to Reach" is 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] Vulnerable is defined as Disadvantaged Vulnerable Communities (DVC) which consists of communities in the 25% highest scoring census tracts according to the most current versions of the CalEnviroScreen, as well as all California tribal lands, census tracts that score in the highest 5% of Pollution Burden within CalEnviroScreen, but do not receive an overall CalEnviroScreen score due to unreliable public health and socioeconomic data, and census tracts with median household incomes less than 60% of state median income.

[8] Utilized AB617 Communities identified by CARB's Community Air Protection Program (CAPP)

[9] 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

[10] Utilizing Low-Income Energy Affordability Data (LEAD) Tool to determine average energy burden as a % of income by census tract. HEB threshold of 6.3% and above is selected based on 2016 Low Income Needs Assessment (

[11] The Socioeconomic Vulnerability Index (SEVI) metric represents the relative socioeconomic standing of census tracts, referred to as communities, in terms of poverty, unemployment, educational attainment, linguistic isolation, and

[12] Utilizing AR20 data, census tracts with Electric AR20 above 15% is selected. Threshold based on CPUC 2019 Annual Affordability Report.

[13] Based on Asthma score in CalEnviroScreen 4.

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
<b>Demographic</b>											
Housing Type											
SF											
MH											
MF In-Unit											
Rent vs. Own											
Own											
Rent											
Previous											
New Participant											
Seniors											
Veterans											
Hard-to-Reach											
Vulnerable											
<b>Location</b>											
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											
<b>Financial</b>											
CARE											
FERA											
Disconnected											
Arrearages											
High Usage											
High Energy Burden											
SEVI											
Affordability Ratio											
<b>Health Condition</b>											
Medical Baseline											
Respiratory											
Disabled											

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

See above for footnotes

See above for footnotes

**Energy Savings Assistance Program Table - 8 Clean Energy Referral, Leveraging, and Coordination  
Southern California Edison  
Through December 2022**

Partner	Brief Description of Effort	# of Referral	# of Leveraging [3]	# of Coordination Efforts	# of Leads	# of Enrollments
SASH [1]	Provides qualified low-income homeowners fixed, up front, capacity-based incentives to help offset the upfront cost of a solar electric system	408	0	NA	368	2
MASH [1]	Provides solar incentives on qualifying affordable housing multifamily dwellings. MASH is the low-income, multifamily component within the California Solar Initiative program.	24	0	NA	0	0
Medical Baseline	Provides eligible enrolled customers with an additional 16.5 kilowatt-hours (kWh) of electricity per day. Provided at the lowest baseline rate, this program helps offset the cost of operating the necessary medical equipment.	NA	NA	NA	2,696	2,696
CARE High Usage	Customers whose usage was identified as exceeding 400% to 600% (or more) above the baseline.	NA	NA	NA	405	64
Demand Response - SDP [2]	Residential and non-residential customers participate by allowing SCE to shut down their A/C for up to 6 hours a day during "Energy Events" called during periods of high electricity demand, or emergencies. SCE will supply and install a load control device on your home or central-A/C unit to remotely shut it off during energy events.	57	NA	0	NA	NA
Demand Response - Smart Energy Program (SEP) [2]	Eligible residential customers who own a qualifying Wi-Fi enabled smart thermostat may enroll. During an "energy event," SCE will notify the smart thermostat provider to temporarily adjust the temperature setting on the thermostat up to four degrees to limit A/C usage. Participating customers may qualify for a one-time \$75 incentive for enrolling and earn up to \$40 annually for participating between June 1 through September 30.	138	NA	1	NA	NA

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] Fully subscribed for 2022. Leads are waitlisted until 2023.

[2] Data starts with 7/31/22 reporting.

[3] Sharing of lead list



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

OUTREACH STATUS	Quantity (Includes CARE, FERA, and ESA)	List of Participating Tribes
Tribes completed ESA Meet & Confer	8	Benton Paiute, Bishop Paiute, Timbisha Shoshone, Chemehuevi, CRIT, Morongo, Soboba, Pechanga
Tribes requested outreach materials or applications	0	
Tribes who have not accepted offer to Meet and Confer	5	Bridgeport Indian colony, Tule River, <b>Stated residents are over income:</b> San Manuel, 29 Palms, Agua Caliente
Non-Federally Recognized Tribes who participated in Meet & Confer	N/A	
Tribes and Housing Authority sites involved in Focused Project/ESA	0	
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 December 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	\$ 371,858	\$ -	\$ 371,858	\$ 3,228,078	\$ -	\$ 3,228,078	87%	0%	87%
Processing / Certification Re-certification	\$ 1,530,979	\$ -	\$ 1,530,979	\$ 289,561	\$ -	\$ 289,561	\$ 1,277,364	\$ -	\$ 1,277,364	83%	0%	83%
Post Enrollment Verification	\$ 483,467	\$ -	\$ 483,467	\$ 60,529	\$ -	\$ 60,529	\$ 661,415	\$ -	\$ 661,415	137%	0%	137%
IT Programming	\$ 570,000	\$ -	\$ 570,000	\$ 1,843	\$ -	\$ 1,843	\$ 29,873	\$ -	\$ 29,873	5%	0%	5%
Pilots	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
CHANGES Program	\$ 525,000	\$ -	\$ 525,000	\$ 38,187	\$ -	\$ 38,187	\$ 490,735	\$ -	\$ 490,735	93%	0%	93%
Studies	\$ 36,000	\$ -	\$ 36,000	\$ 2,521	\$ -	\$ 2,521	\$ 68,286	\$ -	\$ 68,286	190%	0%	190%
Regulatory Compliance	\$ 478,809	\$ -	\$ 478,809	\$ 10,226	\$ -	\$ 10,226	\$ 221,129	\$ -	\$ 221,129	46%	0%	46%
General Administration	\$ 1,337,746	\$ -	\$ 1,337,746	\$ 72,963	\$ -	\$ 72,963	\$ 1,194,025	\$ -	\$ 1,194,025	89%	0%	89%
CPUC Energy Division	\$ 135,625	\$ -	\$ 135,625	\$ 26,200	\$ -	\$ 26,200	\$ 118,816	\$ -	\$ 118,816	88%	0%	88%
<b>SUBTOTAL MANAGEMENT COSTS</b>	<b>\$ 8,822,256</b>	<b>\$ -</b>	<b>\$ 8,822,256</b>	<b>\$ 873,886</b>	<b>\$ -</b>	<b>\$ 873,886</b>	<b>\$ 7,289,721</b>	<b>\$ -</b>	<b>\$ 7,289,721</b>	<b>83%</b>	<b>0%</b>	<b>83%</b>
CARE Rate Discount	\$ 404,343,437	\$ -	\$ 404,343,437	\$ 51,033,909	\$ -	\$ 51,033,909	\$ 666,223,958	\$ -	\$ 666,223,958	165%	0%	165%
<b>TOTAL PROGRAM COSTS &amp; CUSTOMER DISCOUNTS</b>	<b>\$ 413,165,693</b>	<b>\$ -</b>	<b>\$ 413,165,693</b>	<b>\$ 51,907,796</b>	<b>\$ -</b>	<b>\$ 51,907,796</b>	<b>\$ 673,513,680</b>	<b>\$ -</b>	<b>\$ 673,513,680</b>	<b>163%</b>	<b>0%</b>	<b>163%</b>
Other CARE Rate Benefits												
- DWR Bond Charge Exemption				\$ 1,638,377		\$ 1,638,377	\$24,602,192		\$ 24,602,192			
- CARE Surcharge Exemption				\$ 2,618,388		\$ 2,618,388	\$39,772,966		\$ 39,772,966			
- California Solar Initiative Exemption				\$ -		\$ -	\$ -		\$ -			
- kWh Surcharge Exemption				\$ -		\$ -	\$ -		\$ -			
- Vehicle Grid Integration Exemption				\$ -		\$ -	\$ -		\$ -			
Total Other CARE Rate Benefits				<b>\$ 4,256,765</b>	<b>\$ -</b>	<b>\$ 4,256,765</b>	<b>\$ 64,375,158</b>	<b>\$ -</b>	<b>\$ 64,375,158</b>			
Indirect Costs				\$ 86,457	\$ -	\$ 86,457	\$ 1,138,869	\$ -	\$ 1,138,869			

[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 December 2022

	New Enrollment										Recertification <sup>1</sup>				Attrition (Drop Offs)				Enrollment		Total CARE Participants	Estimated CARE Eligible	Enrollment <sup>2</sup> Rate % (WIX)	
	Automatic Enrollment			Self-Certification (Income or Categorical)				Total New Enrollment <sup>4</sup> (E+J)	Scheduled <sup>5</sup>	Non-Scheduled (Duplicates) <sup>5</sup>	Automatic	Total Recertification (L+M+N)	No Response <sup>6,7</sup>	Failed PEV	Failed Recertification <sup>8</sup>	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)					
	Inter-Utility <sup>3</sup>	Intra-Utility <sup>3</sup>	Leveraging <sup>3</sup>	Combined (B+C+D)	Online	Paper	Phone													Capitalization				Combined (F+G+H+I)
January	687	2	0	689	8,159	5,225	10,172	186	23,741	24,430	14,305	1,051	0	15,356	51	0	10	78,262	78,332	39,786	-53,002	1,348,032	1,276,922	100%
February	134	26	0	160	8,212	12,214	10,119	195	30,740	31,600	10,545	794	0	11,339	36	2	10	68,407	68,455	43,839	-36,055	1,311,125	1,276,922	103%
March	222	6	0	228	7,804	9,205	12,373	226	29,608	29,836	7,326	655	0	7,981	13	6	5	69,074	69,088	37,817	-39,862	1,271,287	1,276,922	100%
April	239	6	0	245	7,680	3,768	8,525	189	20,172	20,417	10,110	878	0	10,988	6	6	2	36,895	36,909	31,405	-16,492	1,254,809	1,276,922	98%
May	176	1	0	177	7,462	1,646	7,285	300	16,844	17,523	17,669	1,000	0	17,769	2	1		24,383	24,393	39,762	-7,976	1,247,448	1,276,922	98%
June	160	266	0	426	10,336	2,309	5,317	274	22,236	22,662	4,909	481	0	5,390	1	7	2	50,174	50,184	28,052	-27,522	1,219,937	1,276,922	96%
July	101	104	0	205	16,070	3,724	12,648	264	33,707	31,812	4,025	275	0	2,005	9	9	0	58,730	58,741	37,117	-26,829	1,393,117	1,276,922	93%
August	112	1	0	113	19,040	6,441	16,184	290	41,955	42,068	3,716	416	0	4,132	1	15	3	47,129	47,148	48,200	-5,080	1,188,056	1,276,922	93%
September	91	0	0	91	18,007	7,531	13,997	372	39,907	39,988	3,718	358	0	4,076	0	5	6	37,876	37,887	44,074	2,111	1,190,178	1,276,922	93%
October	72	4	0	76	17,013	13,666	10,188	311	41,268	41,324	3,836	318	0	4,159	1	10	6	38,627	38,644	45,481	2,680	1,192,875	1,276,922	93%
November	72	2	0	74	12,197	8,486	5,877	162	26,722	26,796	3,365	348	0	3,613	0	14	4	50,492	50,510	30,459	-23,714	1,169,179	1,276,922	92%
December	91	168	0	259	11,856	6,786	7,019	167	26,813	26,180	2,376	198	0	2,577	1	0	0	30,171	30,174	28,757	-3,964	1,165,186	1,276,922	91%
YTD Total	2,749	664	0	3,383	142,929	81,201	123,857	3,006	368,793	354,146	81,646	7,633	0	88,673	112	75	64	686,824	689,076	442,719	-236,929	1,165,186	1,276,922	91%

<sup>1</sup> Enrollments via data sharing between the IOUs.

<sup>2</sup> Enrollments via data sharing between departments and/or programs within the utility.

<sup>3</sup> Enrollments via data sharing with programs outside the IOU that serve low-income customers.

<sup>4</sup> Recertification results are tied to the month initiated. Therefore, recertification results may be pending due to the time permitted for a participant to respond.

<sup>5</sup> Recertification results include volumes for COVID-19 protections and reinstatements.

<sup>6</sup> Penetration Rate and Enrollment Rate are the same value.

**CARE Table 3A - Post-Enrollment Verification Results (Model)**  
**Southern California Edison**  
**Through December 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%	176	0	176	94.6%	0.0%
April	1,254,809	0	0.0%	0	0	0	0.0%	0.0%
May	1,247,449	5,712	0.5%	4,856	11	4,867	85.2%	0.4%
June	1,219,937	6,743	0.6%	5,760	15	5,775	85.6%	0.5%
July	1,193,117	7,490	0.6%	4,644	6	4,650	62.1%	0.4%
August	1,188,056	6,773	0.6%	5,310	8	5,318	78.5%	0.4%
September	1,190,178	3,599	0.3%	2,394	0	2,394	66.5%	0.2%
October	1,192,875	4,624	0.4%	623	2	625	13.5%	0.1%
November	1,169,179	8,328	0.7%	286	2	288	3.5%	0.0%
December	1,165,186	9,429	0.8%	119	0	119	1.3%	0.0%
<b>YTD Total</b>	<b>1,165,186</b>	<b>52,884</b>	<b>4.5%</b>	<b>24,168</b>	<b>44</b>	<b>24,212</b>	<b>45.8%</b>	<b>2.1%</b>

<sup>1</sup> Includes all customers who failed SCE's CARE eligibility probability model.

<sup>2</sup> Includes customers verified as over income or who requested to be de-enrolled.

<sup>3</sup> Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request.

<sup>4</sup> 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 December 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%	6,687	4	6,691	89.2%	0.5%
February	1,311,125	7,289	0.6%	6,614	10	6,624	90.9%	0.5%
March	1,271,287	1,527	0.1%	1,378	1	1,379	90.3%	0.1%
April	1,254,809	1,062	0.1%	914	0	914	86.1%	0.1%
May	1,247,449	2,405	0.2%	1,835	3	1,838	76.4%	0.1%
June	1,219,937	1,928	0.2%	1,510	3	1,513	78.5%	0.1%
July	1,193,117	780	0.1%	633	2	635	81.4%	0.1%
August	1,188,056	1,878	0.2%	1,558	3	1,561	83.1%	0.1%
September	1,190,178	3,323	0.3%	2,068	4	2,072	62.4%	0.2%
October	1,192,875	5,412	0.5%	4,499	1	4,500	83.1%	0.4%
November	1,169,179	1,796	0.2%	1,500	0	1,500	83.5%	0.1%
December	1,165,186	1,071	0.1%	16	0	16	1.5%	0.0%
<b>YTD Total</b>	<b>1,165,186</b>	<b>35,970</b>	<b>3.1%</b>	<b>29,212</b>	<b>31</b>	<b>29,243</b>	<b>81.3%</b>	<b>2.5%</b>

<sup>1</sup> Includes all participants who were selected for high usage verification process.

<sup>2</sup> Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

<sup>3</sup> 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.

<sup>4</sup> 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 December 2022**

County	Estimated Eligible Households <sup>1,4</sup>			Total Households Enrolled <sup>2</sup>			Enrollment Rate <sup>3</sup>		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Fresno	633	0	633	57	0	57	9%	0%	9%
Imperial	0	282	282	26	55	81	0%	20%	29%
Inyo	9	1,362	1,371	26	921	947	289%	68%	69%
Kern	13,428	17,886	31,314	9,310	13,037	22,347	69%	73%	71%
Kings	0	7,611	7,611	71	8,263	8,334	0%	109%	109%
Los Angeles	501,121	2,884	504,005	473,120	1,991	475,111	94%	69%	94%
Madera	2	0	2	0	0	0	0%	0%	0%
Mono	0	2,292	2,292	12	762	774	0%	33%	34%
Orange	200,645	0	200,645	157,071	0	157,071	78%	0%	78%
Riverside	83,702	79,988	163,690	86,436	90,981	177,417	103%	114%	108%
San Bernardino	193,062	43,828	236,890	175,704	35,769	211,473	91%	82%	89%
San Diego	0	1	1	0	1	1	0%	100%	100%
Santa Barbara	14,824	0	14,824	9,136	0	9,136	62%	0%	62%
Tulare	12,323	37,874	50,197	11,841	40,026	51,867	96%	106%	103%
Ventura	60,710	2,452	63,162	48,831	1,739	50,570	80%	71%	80%
<b>Total</b>	<b>1,080,459</b>	<b>196,460</b>	<b>1,276,919</b>	<b>971,641</b>	<b>193,545</b>	<b>1,165,186</b>	<b>90%</b>	<b>99%</b>	<b>91%</b>

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

<sup>2</sup> Total Households Enrolled includes submeter tenants.

<sup>3</sup> Penetration Rate and Enrollment Rate are the same value.

<sup>4</sup> 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 December 2022**

Month	Total CARE Households	Households Requested to Recertify <sup>1,6</sup>	% of Households Total (C/B)	Households Recertified <sup>2,5,6,7</sup>	Households De-enrolled <sup>3,6,7</sup>	Recertification Rate % <sup>4</sup> (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	10,697	0.9%	10,041	37	93.9%	0.0%
May	1,247,449	13,607	1.1%	12,692	75	93.3%	0.0%
June	1,219,937	6,991	0.6%	7,130	29	102.0%	0.0%
July	1,193,117	4,905	0.4%	9,093	39	185.4%	0.0%
August	1,188,056	4,179	0.4%	9,990	51	239.1%	0.0%
September	1,190,178	4,191	0.4%	9,410	42	224.5%	0.0%
October	1,192,875	4,271	0.4%	12,336	51	288.8%	0.0%
November	1,169,179	3,775	0.3%	6,186	14	163.9%	0.0%
December	1,165,186	2,566	0.2%	2,379	1	92.7%	0.0%
<b>YTD</b>	<b>1,165,186</b>	<b>90,714</b>	<b>7.8%</b>	<b>113,346</b>	<b>473</b>	<b>124.9%</b>	<b>0.04%</b>

<sup>1</sup> Excludes count of customers recertified through the probability model.

<sup>2</sup> 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.

<sup>3</sup> Includes customers who did not respond or who requested to be de-enrolled.

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

<sup>5</sup> Recertification results include volumes for COVID-19 protections and reinstatements.

<sup>6</sup> 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.

<sup>7</sup> 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 Contractors<sup>1</sup>**  
**Southern California Edison**  
**Through December 2022**

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date <sup>2</sup>
2-1-1 ORANGE COUNTY		x			3	111
ALPHA ENTERPRISES		x			-	-
APAC SERVICE CENTER	x				1	68
ARMENIAN RELIEF SOCIETY	x				-	-
ASIAN AMERICAN DRUG ABUSE PROG	x				-	-
ASIAN AMERICAN RESOURCE CENTER	x		x		2	10
ASIAN YOUTH CENTER	x				-	-
BEST PARTNERS	x				128	2,512
BETHEL BAPTIST CHURCH	x				-	-
DELHI CENTER	x				-	-
BETHEL BAPTIST CHURCH	x				-	-
BISHOP PAIUTE TRIBE	x				1	4
C.O.R. COMM DEVELOPMENT CORP	x				1	1
CAREGIVERS VOLUNTEERS ELDERLY		x			-	1
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		4	32
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		-	18
HELP OF OJAI, INC.	x				-	-
HOUSING AUTHORITY OF KINGS CO	x		x		-	-
INLAND SOUTHERN CALIFORNIA 211+	x	x			14	152
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				-	4
MENIFEE VALLEY CHAMBER OF COMMERCE		x			-	-
MEXICAN AMERICAN OPPORTUNITY		x	x		-	-
MTN COMM FAM RESOURCE CNTR	x				-	2
NEW GREATER CIR. MISSION, INC	x				-	-
NEW HOPE VILLAGE, INC	x				-	1
NEW HORIZONS CAREGIVERS GROUP		x			-	5
OCCC	x				-	-
OPERATION GRACE	x				-	-
OUR COMMUNITY WORKS	x				13	79
PACIFIC ISLANDER HLTH (PIHP)	x				-	-
PACIFIC PRIDE FOUNDATION	x				-	-
PRM CONSULTING INC.	x	x	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			-	6
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			-	-
<b>Total Enrollments</b>					<b>167</b>	<b>3,006</b>

<sup>1</sup> All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoice

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

<sup>3</sup> Missing data data will be provided in an amendment when the data is ready.

**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 December 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
<b>Pilots</b>												
CARE Outbound Calling Pilot	\$ 80,000	\$ -	\$ 80,000	\$ 20,461		\$ 20,461	\$ 31,355	\$ -	\$ 31,355	\$ 31,355	\$ -	\$ 31,355
<b>Studies</b>												
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study [2]	\$ 75,000	\$ -	\$ 75,000	\$ 768	\$ -	\$ 768	\$ 46,699	\$ -	\$ 46,699	\$ 74,901	\$ -	\$ 74,901
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Studies</b>	<b>\$ 367,500</b>	<b>\$ -</b>	<b>\$ 367,500</b>	<b>\$ 768</b>	<b>\$ -</b>	<b>\$ 768</b>	<b>\$ 46,699</b>	<b>\$ -</b>	<b>\$ 46,699</b>	<b>\$ 74,901</b>	<b>\$ -</b>	<b>\$ 74,901</b>

[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 December 2022**

<b>Total CARE Households Enrolled</b>				
<b>Month</b>	<b>CARE Enrollment Rate for Zip Codes that have 10% or more disconnections [1]</b>	<b>CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG) [2]</b>	<b>CARE Enrollment Rate for Zip Codes in High Poverty (with 70% or Less CARE Penetration) [3]</b>	<b>CARE Enrollment Rate for DAC (Zip/Census Tract) Codes in High Poverty (with 70% or Less CARE Enrollment Rate)</b>
January				
February				
March				
April				
May				
June				
July	NA	81%	46%	57%
August	NA	81%	46%	56%
September	NA	81%	46%	56%
October	NA	81%	46%	57%
November	NA	81%	46%	56%
December	NA	80%	46%	56%
<b>YTD</b>				

**Note:**

Penetration Rate and Enrollment Rate are the same value.

[1] Disconnections are based on calendar year 2021.

[2] Includes zip codes with >25% of customers with incomes less than 100% FPG.

[3] 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

## CARE Table 8A

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

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes that have 10% or more Disconnections [1]
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) [2]
92403	0%
92617	10%
92341	13%
93208	18%
93554	23%
93260	29%
92266	29%
93207	32%
93265	39%
93285	50%

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in DAC [3]
93554	23%
93260	29%
93207	32%
93265	39%
93285	50%
92225	53%
93519	57%
92347	57%
93528	59%
93243	60%

**Note:**

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

[1] Disconnections are based on calendar year 2021. SCE did not have any disconnections in 2021.

[2] Includes zip codes with >25% of customers with incomes less than 100% FPG.

[3] 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 December 2022**

	Authorized Budget	Current Month Expenses	Year to Date Expenses	% of Budget Spent YTD
<b>FERA Program:</b>	<b>Electric</b>	<b>Electric</b>	<b>Electric</b>	<b>Electric</b>
Outreach	\$ 665,695	\$ 66,426	\$ 807,225	121%
Processing / Certification Re-certification	\$ 382,745	\$ 7,181	\$ 30,463	8%
Post Enrollment Verification	\$ 120,867	\$ 1,101	\$ 13,849	11%
IT Programming	\$ 30,000	\$ 503	\$ 7,036	23%
Pilot(s)	\$ -	\$ -	\$ -	0%
Studies	\$ 24,000	\$ -	\$ -	0%
Regulatory Compliance	\$ 15,445	\$ -	\$ -	0%
General Administration	\$ 43,153	\$ 393	\$ 18,254	42%
CPUC Energy Division	\$ 4,375	\$ -	\$ -	0%
<b>SUBTOTAL MANAGEMENT COSTS</b>	<b>\$ 1,286,280</b>	<b>\$ 75,604</b>	<b>\$ 876,827</b>	<b>68%</b>
FERA Rate Discount	\$28,746,536	\$ 859,113	\$ 11,482,677	40%
<b>TOTAL PROGRAM COSTS &amp; CUSTOMER DISCOUNTS</b>	<b>\$ 30,032,816</b>	<b>\$ 934,717</b>	<b>\$ 12,359,504</b>	<b>41%</b>
Indirect Costs		\$ 1,354	\$ 19,378	

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 December 2022

	New Enrollment									Recertification				Attrition (Drop Offs)				Enrollment		Total FERA Participants	Estimated FERA Eligible	Enrollment <sup>5</sup> Rate % (WX)		
	Automatic Enrollment			Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response <sup>6</sup>	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)				Net Adjusted (K-T)	
	Inter-Utility <sup>2</sup>	Intra-Utility <sup>2</sup>	Leveraging <sup>3</sup>	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	136	14	0	152	0	0	0	988	988	597	-1,143	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	23,358	221,674	11%
July	2	0	0	2	760	52	210	1	1,025	1,025	71	0	0	71	0	1	0	1,592	1,593	1,096	-568	24,791	221,674	11%
August	1	0	0	1	1,066	98	330	1	1,495	1,496	40	6	0	46	0	0	0	1,442	1,442	1,542	54	24,845	221,674	11%
September	0	0	0	0	1,065	87	293	0	1,445	1,445	34	1	0	35	0	0	0	939	939	1,480	506	25,351	221,674	11%
October	0	0	0	0	998	215	223	1	1,437	1,437	43	7	0	50	0	0	0	960	960	1,467	477	25,828	221,674	12%
November	0	0	0	0	701	130	122	0	953	953	25	3	0	28	0	1	0	812	813	981	140	25,969	221,674	12%
December	0	0	0	0	589	83	132	0	814	814	22	0	0	22	0	0	0	671	671	836	143	26,112	221,674	12%
YTD Total	3	0	0	3	7,128	1,273	2,275	9	10,685	10,688	884	82	0	966	4	2	0	13,669	13,875	11,654	-3,187	26,112	221,674	12%

<sup>1</sup> Enrollments via data sharing between the IOUs.

<sup>2</sup> Enrollments via data sharing between departments and/or programs within the utility.

<sup>3</sup> Enrollments via data sharing with programs outside the IOU that serve low-income customers.

<sup>4</sup> No response includes no response to both Recertification and Verification.

<sup>5</sup> Penetration Rate and Enrollment Rate are the same value.

<sup>6</sup> 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.

**FERA Table 3A - Post-Enrollment Verification Results (Model)**  
**Southern California Edison**  
**Through December 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%	3	0	3	100.0%	0.0%
April	26,187	0	0.0%	0	0	0	0.0%	0.0%
May	26,044	133	0.5%	122	0	122	91.7%	0.5%
June	25,358	164	0.6%	149	1	150	91.5%	0.6%
July	24,791	759	3.1%	262	0	262	34.5%	1.1%
August	24,845	195	0.8%	175	1	176	90.3%	0.7%
September	25,351	85	0.3%	72	0	72	84.7%	0.3%
October	25,828	493	1.9%	34	0	34	6.9%	0.1%
November	25,969	230	0.9%	3	0	3	1.3%	0.0%
December	26,112	345	1.3%	2	0	2	0.6%	0.0%
YTD Total	26,112	2,407	9.2%	822	2	824	34.2%	3.2%

<sup>1</sup> Includes all customers who failed SCE's CARE eligibility probability model.

<sup>2</sup> Includes customers verified as over income or who requested to be de-enrolled.

<sup>3</sup> Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request.

<sup>4</sup> 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 December 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	0.0%	6	0	6	42.9%	0.0%
February	27,681	10	0.0%	5	0	5	50.0%	0.0%
March	26,441	56	0.2%	51	0	51	91.1%	0.2%
April	26,187	3	0.0%	1	0	1	33.3%	0.0%
May	26,044	11	0.0%	9	0	9	81.8%	0.0%
June	25,358	21	0.1%	19	0	19	90.5%	0.1%
July	24,791	3	0.0%	3	0	3	100.0%	0.0%
August	24,845	16	0.1%	13	0	13	81.3%	0.1%
September	25,351	23	0.1%	17	0	17	73.9%	0.1%
October	25,828	34	0.1%	32	0	32	94.1%	0.1%
November	25,969	10	0.0%	10	0	10	100.0%	0.0%
December	26,112	8	0.0%	0	0	0	0.0%	0.0%
YTD Total	26,112	209	0.8%	166	0	166	79.4%	0.6%

<sup>1</sup> Includes all participants who were selected for high usage verification process.

<sup>2</sup> Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

<sup>3</sup> 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

<sup>4</sup> 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

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

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

County	Estimated Eligible Households <sup>1,4</sup>			Total Households Enrolled <sup>2</sup>			Enrollment Rate <sup>3</sup>		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Fresno	54	0	54	3	0	3	6%	0%	<b>6%</b>
Imperial	0	2	2	0	0	0	0%	0%	<b>0%</b>
Inyo	1	155	156	0	24	24	0%	15%	<b>15%</b>
Kern	1,665	2,217	3,882	186	197	383	11%	9%	<b>10%</b>
Kings	0	1,690	1,690	0	172	172	0%	10%	<b>10%</b>
Los Angeles	87,868	506	88,374	9,496	102	9,598	11%	20%	<b>11%</b>
Madera	0	0	0	0	0	0	0%	0%	<b>0%</b>
Mono	0	456	456	1	20	21	0%	4%	<b>5%</b>
Orange	30,801	0	30,801	4,129	0	4,129	13%	0%	<b>13%</b>
Riverside	16,418	15,689	32,107	1,970	2,487	4,457	12%	16%	<b>14%</b>

**FERA Table 5 - Recertification Results**  
**Southern California Edison**  
**Through December 2022**

Month	Total FERA Households	Households Requested to Recertify <sup>1,6</sup>	% of Households Total (C/B)	Households Recertified <sup>2,5,6,7</sup>	Households De-enrolled <sup>3,6,7</sup>	Recertification Rate % <sup>4</sup> (E/C)	% of Total Households De-enrolled (F/B)
January	28,380	127	0.4%	134	1	105.5%	0.0%
February	27,681	122	0.4%	112	3	91.8%	0.0%
March	26,441	104	0.4%	110		105.8%	0.0%
April	26,187	139	0.5%	136		97.8%	0.0%
May	26,044	143	0.5%	134		93.7%	0.0%
June	25,358	80	0.3%	76	1	95.0%	0.0%
July	24,791	86	0.3%	138	1	160.5%	0.0%
August	24,845	58	0.2%	101	4	174.1%	0.0%
September	25,351	40	0.2%	91		227.5%	0.0%
October	25,828	63	0.2%	108	2	171.4%	0.0%
November	25,969	37	0.1%	51		137.8%	0.0%
December	26,112	24	0.1%	22		91.7%	0.0%
<b>YTD</b>	<b>26,112</b>	<b>1,023</b>	<b>3.9%</b>	<b>1,213</b>	<b>12</b>	<b>118.6%</b>	<b>0.05%</b>

<sup>1</sup> Excludes count of customers recertified through the probability model.

<sup>2</sup> 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.

<sup>3</sup> Includes customers who did not respond or who requested to be de-enrolled.

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

<sup>5</sup> Recertification results include volumes for COVID-19 protections and reinstatements.

**FERA Table 6 - Capitation Contractors<sup>1</sup>**  
**Southern California Edison**  
**Through December 2022**

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date <sup>2</sup>
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				-	-