

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

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

And Related Matters.

Application 19-11-003

Application 19-11-004

Application 19-11-005

Application 19-11-006

Application 19-11-007

**MONTHLY REPORT OF SOUTHERN CALIFORNIA EDISON COMPANY (U 338-E)
ON LOW INCOME ASSISTANCE PROGRAMS FOR MARCH 2023**

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Dated: April 21, 2023

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**MONTHLY REPORT OF SOUTHERN CALIFORNIA EDISON COMPANY (U 338-E)
ON LOW INCOME ASSISTANCE PROGRAMS FOR MARCH 2023**

Pursuant to Decision (D.) 21-06-015, Southern California Edison Company (SCE) hereby submits the attached monthly status report on its Energy Savings Assistance (ESA), California Alternate Rate for Energy (CARE), and Family Electric Rate Assistance (FERA) program efforts. This is the March monthly report for program year (PY) 2023. The purpose of this report is to consolidate activity for the ESA, CARE, and FERA programs and provide the California Public Utilities Commission's Energy Division with information to assist in analyzing these low-income programs.

This report presents year-to-date ESA, CARE, and FERA program results and expenditures through March 31, 2023.

Respectfully submitted,

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Attachment A

ESA, CARE, and FERA Program Report

March 2023



Southern California Edison Company's

March 2023 Monthly Report for

Energy Savings Assistance (ESA),

California Alternate Rates for Energy (CARE), and

Family Electric Rate Assistance (FERA) Programs

April 21, 2023

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**Southern California Edison Company's Monthly Report for
Energy Savings Assistance (ESA), California Alternate Rates for Energy (CARE), and
Family Electric Rate Assistance (FERA) Programs**

March 2023 Report

Southern California Edison Company (SCE) provides numerous opportunities for customers to reduce their energy bills, become more energy efficient, and find payment arrangements or assistance in tough times. Three of these programs—all focused on helping income-qualified residents—are covered in this monthly report: Energy Savings Assistance (ESA), California Alternate Rates for Energy (CARE), and Family Electric Rate Assistance (FERA).¹ Budgets and goals for these programs from July 1, 2021, through December 31, 2026, were authorized in Decision (D.) 21-06-015, which provides the foundational numbers for this report. All program accomplishments and expenditures herein relate to calendar year 2023 up to and including March 31, 2023.

1. ESA EXECUTIVE SUMMARY

1.1. ESA Program Overview

The objective of SCE's 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, 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, or 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.

The following program-wide changes are being implemented this year:

1. Tiered Offering – Basic and Basic Plus. Low energy users are eligible for a basic package of low and moderate cost measures with good energy savings, such as LED lighting, refrigerators, and smart communicating thermostats (Basic measures). High energy users, which have greater potential for deep

¹ SCE has provided monthly reports for CARE and LIEE (now ESA) since 2001. *See* Decision (D.) 01-95-033, Ordering Paragraph (OP) 17. SCE began including monthly FERA metrics beginning in 2022. *See* D.21-06-015 at 435.

savings, are also offered more expensive measures such as clothes washers, dishwashers, and various HVAC systems (Basic Plus measures).

2. Targeted Outreach by SCE based on energy usage vs. Contractors outreaching. SCE is taking the strategic approach of targeting specific customers based on households with the greatest potential to benefit from the measures offered. By controlling which households are targeted for the program, SCE can better focus resources, maximizing the cost effectiveness of each measure and the program as a whole.
3. Fuel Substitution measures also offered. SCE is offering highly efficient Heat Pump HVAC systems and Heat Pump Water Heaters to replace gas and propane fueled systems where feasible.

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

ESA Main (SF, MH, MF In-Unit) Program Summary Expenses for 2023			
	2023 Authorized / Planning Assumptions	Actual to Date	%
Budget	\$ 49,699,923	\$ 4,087,543	8%
Homes Treated	37,871	198	.5%
kWh Saved	22,416,302	326,693	1.5%
kW Demand Reduced	8,820	51.66	.6%
Therms Saved	N/A	N/A	
GHG Emissions	N/A	N/A	

In 2023, SCE's ESA Main program directly serves Single-Family (SF) and Mobile Home (MH) residential customers. To qualify for ESA Main, households must receive electricity service from SCE, meet the program's income guidelines, and meet feasibility requirements for measure installation. ESA Main applies both to homeowners and home renters. Renters must have the homeowner's written permission, however, before receiving certain program measures and services.

A New Focus

In 2023, ESA Main is shifting its emphasis away from the number of households served to a program that demonstrates greater emphasis on deep electric energy savings and coordination across multiple clean energy programs. Depending on energy usage, customers may be eligible for a different package of measures and services. The Basic package will target those households with low to moderate energy use and offer in-home energy education, smart power strips, Light-Emitting Diodes (LEDs), refrigerators, and smart communicating thermostats. On

the other hand, the Basic Plus package will be targeted to high users, defined as those whose energy use exceeds 300% of the baseline allowance at least once over a 12-month period. The Basic Plus package offers a more comprehensive suite of measures, including building electrification (BE) measures such as space heater and water heat pump appliances. The Basic Plus offerings also include clothes washers, dishwashers, evaporative coolers, freezers, pool pumps, portable air conditioners, room air conditioners, and weatherization services.

There are three stages in the ESA Main program. Each stage is delivered by an SCE-approved contractor. First, the enrollment and assessment stage occur when an ESA contractor confirms the customer's income eligibility and does a walk-through of the home to collect information to help SCE determine the potential for installation of one or more appliances or services. Second, the installation stage occurs when the appliances are delivered, replaced, and installed. In the third and final stage, an inspection may be performed in the home to verify that the contractor has completed the work to meet quality standards. If the work is not done properly, it will be redone at no cost to the customer.

Participation in the ESA Main program began January 1, 2023. The SCE team is continuing to work closely with the ESA contractors through some challenges faced during the transition and ramp up process including supply chain issues, ESA system technical issues, new program policies and new safety requirements affecting program operations. SCE is continuing to improve on contractor communications with one-on-one meetings, trainings, emails, briefings, etc. aimed at issue resolution and education.

Education and Training

SCE is focused on ensuring contractors are aware of and properly trained on the new policies and procedures being implemented in 2023. In March, SCE conducted two separate all contractor training webinars. The first webinar was to review the compliance requirements with SCE's Environmental Health and Safety Handbook as it pertains to contractors conducting work on behalf of the ESA program. Representatives from the SCE Contractor Safety Team were present to be able to answer any questions from contractors and provide guidance on the various safety requirements.

The second training was to review the new HVAC process for all HVAC installations for the 2023-2026 ESA Program. Some topics discussed in the training included:

- A review of the updated HVAC installation procedure for SCE's system,
- Changes and updates to SCE's system to accommodate Home Energy Rating System (HERS) inspections by the SCE Inspector, and
- Review installation and corrections expectations.

Continued Multifamily Support

SCE is also continuing to serve income-qualified customers living in multifamily properties until the Southern Multi-Family Whole Building (MFWB) Program is ready to launch in July 2023. SCE's authorized contractors are conducting Multifamily in-unit treatments in conjunction with the Multifamily Common Area Measures (MF CAM) program described in the section below.

ESA MF CAM Program Summary Expenses for 2023			
	2023 Authorized / Planning Assumptions	Actual to Date	%
Budget	\$ 1,458,479 ²	\$ 659,861	45%
Properties Treated	N/A	22	
kWh Saved	N/A	257,052	
kW Demand Reduced	N/A	10.88	
Therms Saved	N/A	N/A	N/A

The ESA MF CAM program provides energy efficient replacement measures for common areas throughout qualifying multifamily properties. The table above tracks the actual-to-date expenses for MF CAM compared to the annual budget assumption and the actual-to-date kWh saved.

Multifamily properties that qualify for MF CAM may receive energy efficient replacement measures in various common areas such as laundry rooms, recreation rooms, hallways, parking lots, and pool areas. A single parking lot lamp replacement can save as much as 282 kWh per year, making these measures highly beneficial to property owners. In 2023, SCE has completed 22 MF CAM projects, benefiting 1,805 tenant units, and is currently working on 4 projects. These projects include a property that is owned by the Los Angeles County Housing Authority as well as several senior communities throughout Los Angeles and Orange County. SCE is still accepting new projects and plans to continue running MF CAM until the Southern MFWB Program is open to participation in July 2023.

² Number represents the budget allocation for MF CAM from January through June 2023.

ESA Pilot Plus and Pilot Deep (ESA Whole Home) Summary Expenses for 2023			
	2023 Authorized / Planning Assumptions	Actual to Date	%
Budget	\$ 3,884,864	\$ 205,497	5.3%
Homes Treated	0	0	
kWh Saved	0	0	
kW Demand Reduced	0	0	
Therms Saved	N/A	N/A	N/A
GHG Emissions Reduced (Tons)	0		

On June 7, 2021, in issuing D.21-06-015, the Commission approved a redesign concept of the ESA program on a pilot basis based on recommendations from the Commission’s Energy Division (ED). This new redesigned pilot—ESA program Pilot Plus/Deep, also known as ESA Whole Home—is a joint Investor-Owned Utilities (IOU) pilot program between SCE and Southern California Gas Company (SoCalGas), where selected CARE High-Usage customers who have exceeded the allocated baseline allotments (300% and above for SCE, 200% and above for SoCalGas) and who reside within Los Angeles, Riverside, and San Bernardino Counties may opt in to participate.³ The guiding principles of the Pilot Plus/Deep include:

1. Deeper Energy Savings – As determined by a more robust home energy audit and assessment. Depending on the home inspection, participants can qualify for two different tiers of services:
 - Pilot Plus is designed to achieve between an estimated 5 percent and 15 percent savings through the Pilot Plus measure package; Plus, will use deemed savings for its reporting of savings.
 - Pilot Deep is designed to achieve between an estimated 15 percent and 50 percent savings through the Pilot Deep measure package; Deep will use Calculated Savings based on a Test-In, Test-Out Model for the reporting of savings.
2. Equity – While the focus of the program may be towards single-family, owner-occupied homes, the IOUs shall consider how to increase program participation opportunities to renters and whether landlord co-investment is reasonable, given the rent restrictions and landlord co-pays for the multifamily whole building programs.

³ Reference AL-4650-E.

3. **Quality** – Focus on capturing meaningful, deeper savings for low-income households. This means spending more on fewer households to dramatically increase the impact of the ESA Whole Home measures implemented.
4. **Customer-centric** – A seamless low-income delivery program for the recipient with as many services provided in as few visits as possible, and greater customer satisfaction.
5. **Optimization** – Reduction in program administration, duplicative costs, and burdens to ratepayers. ESA Whole Home Maximize total funding to go towards program measures that save energy and/or reduce ratepayer collection.

It is the Commission's expectation that the ESA Whole Home treatments will require a greater investment per customer household and will yield deeper energy savings.

SCE and SoCalGas completed a set of competitive solicitations to select a single third-party program implementer to deliver ESA Whole Home gas and electric program services, as well as a Program Evaluator to review and generate a report on the pilot. Both have been selected, have had a contract initiated and have begun their respective tasks. Customer contact began on December 20, 2022. Due to a small technical issue, the appointments for enrollment and assessments are now scheduled to commence in May 2023.

ESA Building Electrification Pilots Summary Expenses for 2023			
	2023 Authorized / Planning Assumptions	Actual to Date	%
Budget	\$ 8,027,056	\$ 20,165	0.3%
Homes Treated	0		
kWh Saved	0		
kW Demand Reduced	0		
Therms Saved	N/A	N/A	N/A
GHG Emissions Reduced (Tons)	0		

The ESA BE Pilot is an SCE-only pilot offered to income qualified customers who live in single family homes located in disadvantaged communities (DACs). The BE Pilot will focus primarily on replacing space and water heating of customers currently using natural gas or propane to support some of their energy needs, which will reduce customers' overall energy costs and greenhouse gas (GHG) emissions. Limited numbers of homes may receive additional electrification measures, such as induction cooking equipment and energy-efficient clothes dryers.

SCE will begin to report actual homes treated and energy savings once participating homes have successfully been completed and a final inspection has been performed by SCE. Additional information on the BE Pilot is included in Section 1.2.1.

ESA Clean Energy Homes			
	2023 Authorized / Planning Assumptions	Actual to Date	%
Budget	\$ 1,890,000	\$ 66,315	3.5%
Homes Treated	0		
kWh Saved	0		
kW Demand Reduced	0		
Therms Saved	N/A	N/A	N/A
GHG Emissions Reduced (Tons)	0		

As part of its ESA application, SCE proposed the ESA Clean Energy Homes (CEH) Pilot, which is an initiative that is unique to SCE that 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 finalized the contract with the Association for Energy Affordability the third party selected to implement the CEH Pilot and is expected to be open to participation in Q2 2023, slated for mid-May 2023. SCE is working with the implementor on marketing activities, website creation, and other implementation activities.

In September 2022, APEX Analytics was selected to conduct the evaluation of the CEH Pilot. The contract was negotiated and signed in November 2022 after which the consultant was on boarded. The evaluation contractor was brought on board at roughly the same time as the pilot implementer to facilitate an embedded evaluation. The evaluator and SCE met in February to discuss the proposed evaluation plan to ensure adequate and sufficient data are gathered for a thorough evaluation. SCE intends to review this plan with the evaluator in April 2023. In the upcoming months, it is anticipated that the research plan will be finalized, and the evaluator will begin to design data collection instruments to begin gathering data as the pilot rolls out.

1.1.2. Program Measure Changes

Decision 21-06-015 allows the utilities, in consultation with the statewide ESA Working Group, to update the measure mix through the ESA program monthly report.⁴ There was one measure change established in December 2022 which took effect January 1, 2023: a temporary hold on attic insulation in areas requiring permits because of the building code change described below.

New Attic Insulation Installation building code standards for both new construction and retrofits 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.

Existing ESA program requirements:

- Protection of heat producing devices using barriers (open blocking);
- Minimum R-value same as the T-24 prescriptive approach for new construction; and
- Sealing the attic floor prior to insulating is not required.

Overview of the new CEC insulation requirements:

- 2023 attic insulation requirements for permitted jobs in certain climate zones
 - Insulate to R-49
 - Seal attic floor before insulating
 - Replace can lights with IC fixture or install fire-proof cover
 - Insulate over can lights
- Publication of IS Manual delayed: need to publish before 1/23

ESA program impacts include:

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

The PP/IS 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

⁴ D.21-06-015 at 486, OP 69.

to modify the Installation Standard (IS) Manual language for Attic Insulation to read as follows:

- Beginning 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 shall:
 - 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.

1.2. ESA Program Customer Outreach and Enrollment Update

SCE’s outreach efforts, in conjunction with the outreach efforts of its ESA program contractors, include numerous channels and innovative approaches to inform and enroll customers. The following section describes some of the methods SCE implements 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.

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

SCE continues to partner with community-based organizations (CBOs) and private-sector service providers to assess homes for the delivery of ESA program services in local communities for the ESA Main program. ESA contractors are continuing to enroll customers through various ways including SCE-generated leads, SCE marketing initiatives, and other leveraging efforts.

In 2022, the ESA Main program moved to a waitlist approach for interested customers to control leads due to budget constraints and program ramp down activities associated with closing out the 2022 program year. The customers that were on the waitlist and not served in 2022 were provided as leads to the ESA contractors as they began their ramp up throughout March 2023 under the new tiered ESA Main program offerings. SCE has continued to focus on targeting customers that were enrolled in the FERA program as well as high-usage electricity customers to align with new program direction.

SCE continues to provide SCE-generated leads to contractors, including those customers that contact the customer service center as well as those that sign up on the ESA webpage on sce.com. Although slow to start, SCE is continuing to resolve all system and technical issues that are affecting the dissemination of leads to contractors.

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

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

SCE is currently accepting new projects and has several projects ongoing. Until the launch of the Southern MFWB Program in July 2023, SCE will continue treating in-dwelling units and completing CAM projects.

ESA Pilot Plus/Deep (ESA Whole Home)

Customer outreach activities commenced on December 20, 2022, with an initial list of customers who were deemed eligible for participation, at present, only 8% of those customers have expressed interest. The implementer, Maroma Energy Services, is refining its outreach and marketing efforts based on the initial sampling, which contained instances of bad phone numbers and/or no email address.

Marketing materials have been drafted and are being reviewed by both of the IOUs (SCE and SoCalGas) as well as the evaluations team (Illume Advising), once the marketing materials designs have been completed, they will be submitted to both SCE's and SoCalGas' respective corporate marketing departments for approval and authorized use of the corporate logos. Finalized materials are anticipated to become available by end of April 2023.

ESA Building Electrification Pilot

In March, the BE Pilot continued to outreach to the 1,500 customers previously identified as living in single-family homes, in disadvantaged communities, and on the CARE rate. The implementer performed outbound calls to identify customers interested in participating in the BE Pilot. The effort included educating customers on the benefits of electrification, available services at no cost, pre-screening for customer eligibility, and scheduling an enrollment site visit. Based on the low response rate (<1%), a different effort is being planned which may include an email and/or direct mail campaign. Marketing materials, such as a letter, postcard, and fact sheet will be developed in April 2023. In addition, a webpage for the BE Pilot is being considered.

ESA Clean Energy Homes (CEH)

SCE is currently putting together its CEH Pilot Outreach and Education Plan. The Plan's primary objectives are first, to increase awareness of the Pilot's tenant education incentives among developers and property owners; second, to drive developers and property owners to participate in the Pilot's tenant education offering; and third, to increase tenant understanding of benefits of living in an all-electric home. The Pilot will connect with affordable multifamily developers and property owners to drive participation in and access to tenant education incentives.

Language Line

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

Language	Number of Calls
Mandarin	1

Tribal Outreach

SCE conducted its first Tribal training on March 1, 2023. SCE coordinated a group of key experts to provide a complete training on CARE, FERA, ESA, Medical Baseline, Access and Functional needs programs and SCE Services. Training also included an overview of grant requirements, Tribal benefits, and an introduction to a new solar billing plan. The training was recorded for the Tribes that were unable to attend and for those who would like to review again. The SCE Tribal liaison team participated in the TANF Family Wellness Conference with Pechanga, Morongo, and Soboba TANF organizations on March 10, 2023, to promote SCE programs and encourage participants to enroll.

In March, SCE continued engaging Tribal leaders to offer mini grants. These mini grants provide training about SCE's income-qualified programs so that Tribal leaders can serve as liaisons to their communities about these programs to increase Tribal enrollments and installations. SCE secured one-on-one meetings with six Tribes and will continue to outreach to Tribal nations throughout SCE's service territory. The following five Tribes have signed mini-grant agreements: Benton Paiute, Bridgeport Indian Colony, Timbisha Shoshone, Tule River Indian Tribe, and Soboba Band of Luiseño Indians.

The following table shows a current list of the thirteen (13) Tribes identified in SCE's service territory and the status of SCE's efforts from previous years to date. Tribes that have participated in the ESA program are considered "treated."

Tribes “in progress” have been provided program materials. SCE will continue to outreach to these Tribes to facilitate program implementation. The Tribes marked as “refused” have either stated they are not interested in the ESA program or that their residents do not meet the income qualifications.

Tribal Nations in SCE’s Territory: ESA Status	Treated	Refused	In progress
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 and ESA Programs.

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

General Awareness Marketing

Online Advertising

In the month of March, no online advertising was conducted by the ESA program. SCE is working with a marketing agency on development of future online campaigns expected to launch in Summer 2023.

Social Media

In the month of March, no social media advertising was conducted by the ESA program. SCE is working with a marketing agency on development of future social media awareness campaigns expected to launch in Summer 2023.

Direct Marketing

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

- **Email** — The ESA program launched an email campaign in March targeting Basic Plus customers that were already enrolled in CARE or FERA. Approximately 40,000 emails were sent to customers defined as those whose energy use exceeds 300% of the baseline allowance at least once over a 12-month period. SCE is working with a marketing agency on development of future email campaigns targeting Basic customers with the first campaign for the Basic offerings expected to launch in April 2023. The email campaign's creative messaging for customer acquisition is shown in the illustration below.

LOADS OF FREE* APPLIANCES THAT COULD SAVE YOU MONEY

Receive Free* Energy-Efficient Appliances that Could Lower Your Bills —for Qualified Homeowners and Renters

The Energy Savings Assistance (ESA) program is designed to help you conserve energy and save money. It's a win-win. If you qualify, we'll cover the costs of new energy-efficient appliances—including installation.

The online application only takes a few minutes to complete, and your information will be kept confidential. Once you apply, we will determine your eligibility for the ESA program. If eligible, you will be referred to an authorized contractor in your area.

Apply Now for ESA >

Appliances and Services that Could Save You Money

The ESA program offers several appliance upgrades and energy-saving services you may be eligible for, grouped into Basic and Basic Plus categories.

Offerings include:

- Refrigerator Replacement
- Smart Thermostat
- Thermostatic Shower Valve/ Showerhead
- Lighting (LEDs)
- Smart Power Strip
- Clothes Washer Replacement
- Dishwasher Replacement
- Freezer Replacement
- Heat Pump Water Heater Replacement
- Pool Pump Replacement
- Cooling*
 - Evaporative Cooler Installation
 - Evaporative Cooler Maintenance
 - Window or Wall A/C Replacement
 - Central A/C or Central Heat Pump Replacement
 - Portable A/C Installation
- HVAC Filter
- Weatherization Services

*These services may not be available in all areas.

Learn More >

We're Here to Help

To learn more about the ESA program and view eligibility requirements, please visit sce.com/esap.

If you are interested in learning more about this and other money-saving programs, you can also call our SCE Energy Efficiency Department at **1-800-736-4772**, Monday through Friday, 8 a.m.-6 p.m.

*Terms and Conditions apply.

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- Direct Mail** — The ESA program did not conduct any direct mail campaigns in the month of March. SCE continued a co-marketing piece with the ESA, CARE, FERA and Arrearage Management Plan (AMP) programs. This mailer was sent out to approximately 70,000 CARE and over 50,000 FERA customers in March 2023. The letter

mentioned ESA and directed interested customers to call SCE's customer service center or apply on the ESA website. CARE and FERA programs will continue to cross promote ESA in the coming months. SCE is also working with a marketing agency on development of future direct mail campaigns targeting Basic and Basic Plus customers with the first campaign expected to launch in April 2023.

- **SCE.com Website** — The ESA program webpage was redesigned in preparation for program launch in January 2023. The revised site includes information on the Basic and Basic Plus package offerings as well as additional Frequently Asked Questions added specifically to aid renters in the enrollment process. The ESA program webpage (www.sce.com/esap) also 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 March, SCE received over 720 ESA-related internet leads.

An illustration of the redesigned ESA webpage is shown below.

Redesigned ESA Webpage


Energy Savings Assistance Program.


The Energy Savings Assistance (ESA) 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 at a minimal charge. If you qualify, we'll cover the costs of new energy-efficient appliances—including installation.

[Apply Now](#)

The online application only takes a few minutes to complete and your information will be kept confidential. Once you apply, we will determine your eligibility for the program. If eligible, you will be referred to an authorized contractor in your area.

Already applied?
[Check your enrollment status](#)



**How the Program Works**

There are three stages in the ESA program. Each stage is delivered by an SCE approved contractor. Where possible, contractors will provide remote outreach and assessment services.

Step 1: Qualification and Assessment <p>To be eligible, you must meet specific household income guidelines. After income qualification, a contractor will do a walk-through of your home to collect information to help SCE determine the potential for installation of one or more appliances or services.</p>	Step 2: Service Delivery <p>Installation of appliances and services, such as weatherization, are carried out by approved contractors.</p>	Step 3: Inspection <p>An inspection may be performed in your home to see if the contractor has completed the work to meet our quality standards. If the work is not done properly, it will be redone at no cost to you.</p>
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- **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 March, the ESA program referred approximately 7 of these customers to SCE contractors 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. In the month of March, SCE received over 1,600 ESA related calls from interested customers.

SCE continues to offer income-qualified Customer Emergency Protections for customers who contact 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 March, SCE received approximately 4 calls of this nature and referred the customer leads 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, 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 March.

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

CBO Activities

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

Multicultural Outreach

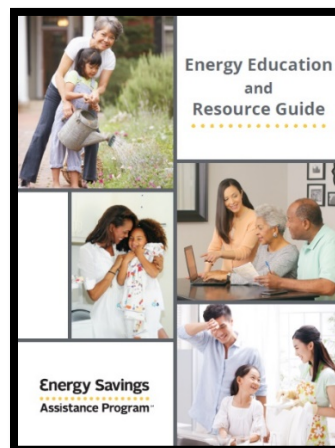
No activity this month.

Other Customer Engagement Efforts

No activity this month.

1.2.3. Managing Energy Use

SCE's contractors' Program Representatives continue to review the ESA program Customer Energy Education and Resource Guide with each program enrollee at the time of in-home or virtual enrollment. The Guide is available in seven languages in both printed and electronic (PDF) versions; additionally, a braille version is also available upon request. 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, SCE's customer self-service portal (SCE.com), which provides them with additional time- and money-saving tools and opportunities to participate in residential energy efficiency rebate and demand response programs.



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

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 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 the financial obstacles they may be facing. ESA contractors act as a communication channel to customers by informing them of the benefits and resources available through SCE, state agencies, and local programs.

1.3. Leveraging Success Evaluation, Including CSD

1.3.1. 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.

1.4. Workforce Education & Training (WE&T)

1.4.1. 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 continues to encourage ESA contractors to take advantage of its Workforce Education & Training (WE&T) resources. First, SCE's Energy Education Centers (EEC), located in Irwindale and Tulare, California, offer a wide range of low-cost and free resources for ESA contractors. In March 2023, EEC calendars continued to be shared with all ESA contractors and vendors; four individuals took advantage of eight course offerings and trainings that were made available.

Second, SCE will continue to utilize 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 subprogram to provide opportunities for incumbent workers in energy efficiency related jobs/careers. In conjunction with these efforts, SCE will engage with our partners at Pacific Gas and Electric (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.

Finally, SCE contracts with various local private contractors (LPCs), CBOs, and faith-based organizations (FBOs) to provide ESA program services. Many of these organizations are in low-income and disadvantaged communities. In March 2023 approximately 499 individuals from these organizations are working in support of SCE’s ESA program. As of March 31, 2023, SCE has approximately 65 active ESA program representatives who have been approved to conduct virtual (not in-person) enrollment and assessment activities.

1.5. Pilots and Studies

1.5.1. ESA Program Pilot

ESA Pilot Plus/Deep (ESA Whole Home)

Reference *Sections 1.1.1 and 1.2.1* for additional information pertaining to the ESA Whole Home Pilot and its respective activities.

Evaluation of ESA Pilot Plus/Deep

The Whole Home Joint Pilot Evaluation was initiated in October 2022 with the onboarding of Illume Advising as the study evaluator. Since then, Illume Advising has launched a kickoff meeting and completed evaluation plans based on the feedback provided by the joint IOUs. They have also initiated staff and implementer interviews as part of the process evaluation activities. Currently, all parties are coordinating the data collection process with Illume Advising, while finalizing the data required to complete random sampling and baseline assessment tasks. In the coming weeks, Illume Advising will be drafting a questionnaire for the customer surveys, completing random sampling, finalizing the program theory and logic model, and continuing with evaluability assessment and metrics review.

ESA Building Electrification (BE) Pilot

See *Sections 1.1.1 and 1.2.1* for additional information pertaining to the BE Pilot and its respective activities.

Evaluation of ESA BE Pilot

The BE Pilot Evaluation kicked off in December 2022. During February 2023 the evaluation consultant, Illume, focused on providing revisions to the study work plan and identifying an avenue to collect the non-electric energy billing data required for the billing analysis. In the upcoming months the research plan will be finalized, and the consultant will solidify data collection needs including a coordinated effort with the Implementer to gather initial participant property and household data to use as part of the evaluation.

ESA Clean Energy Homes (CEH) Pilot

See *Sections 1.1.1 and 1.2.1* for additional information pertaining to the CEH Pilot and its respective activities.

Evaluation of ESA CEH Pilot

The CEH Pilot evaluation kicked off in February. The consultant hired for the evaluation is APEX analytics. The proposed evaluation plan was reviewed by SCE staff and discussed as part of the kick-off meeting. As a result of this meeting, SCE developed the final draft evaluation plan, which includes SCE staff interviews.

1.5.2. ESA Program Studies

2025 Low Income Needs Assessment (LINA) Study

Given the legal mandate to conduct a Low Income Needs Assessment (LINA) every three years, upon completion of the 2022 LINA Study, planning activities for the 2025 LINA Study commenced. The study is jointly funded between CARE and ESA programs. During Q1, the ED and IOUs began generating initial ideas for the 2025 LINA work scope. During the upcoming months, the ED's proposed scope will be shared with the LIOB. The study team comprised of the IOUs and ED will develop a more refined detailed RFP to solicit bids from research firms interested in conducting the study. SoCalGas will contract manage the study on behalf of the IOUs and ED. The study must be completed by December 2025.

ESA/CARE Categorical Study

The statewide Categorical Study examines 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 is also looking at the potential to coordinate with other agencies to programs to facilitate automatic enrollment in the income qualified programs. The study is jointly funded between CARE and ESA programs. San Diego Gas & Electric Company (SDG&E) is the contract manager for the study. In late February, a draft memo which included the consultant's approach, rationale and assessments of the programs was circulated to the IOU study team, the ED and subsequently to the study working group. The consultant is reviewing input and working on a draft report based on the feedback received. The study team received a draft report to review in March 2023. Following reviews, the consultant will respond to feedback and prepare a semi-final draft report to share with the public for additional input prior to finalizing the report. The study is expected to be completed in Q2 2023.

2. CARE EXECUTIVE SUMMARY

2.1. CARE Program 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.⁶ Through CARE, customers can save 30%-35% a month on their electricity 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.

2.1.1. Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget	Expenses Year-to-Date	% of 2023 Budget Spent
Outreach	\$ 3,788,556	\$ (140,780) ⁷	-4%
Processing / Certification Recertification	\$ 1,571,943	\$ 489,067	31%
Post Enrollment Verification	\$ 496,403	\$ 67,096	14%
IT Programming	\$ 570,000	\$ 5,528	1%
Pilots	\$ -	\$ -	0%
CHANGES Program	\$ 525,000	\$100,916	19%
Studies	\$ 81,000	\$71,039	88%
Regulatory Compliance	\$ 582,694	\$26,621	5%
General Administration	\$ 1,377,006	\$332,787	24%
CPUC Energy Division	\$ 135,625	\$18,750	14%
Total Expenses	\$ 9,128,227	\$971,025	11%
Subsidies and Benefits	\$ 409,564,225	\$156,585,695	38%
Total Program Costs & Discounts	\$ 418,692,452	\$ 157,556,720	38%

⁶ Public Utilities Code §739.1(a).

⁷ Negative amount due to a credit of \$342,608 issued by the vendor. Vendor will be rebilling SCE in April for a revised amount.

2.1.2. Provide the CARE Program enrollment rate to date.

CARE Enrollment		
Participants Enrolled	Eligible Participants⁸	Enrollment Rate
1,158,047	1,315,495	88%

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, FBOs and CBOs 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 distinguishes CARE and FERA customers by tailoring the marketing to the specific demographics and target audience for each program. 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, CBOs, and banner ads in applications.

⁸ On April 13, 2023, PG&E, on behalf of the IOUs, filed the Annual Estimates of CARE and FERA Eligible Customers and Related Information. This number reflects estimates of SCE's CARE Eligible Participants for 2023.

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 March 2023, approximately 144,525 e-mails were sent out for CARE and approximately 69,322 direct mail pieces were sent to potential CARE applicants. See an illustration of a sample marketing piece below.

Sample CARE Marketing Piece



«Date»

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

**YOU COULD SAVE
UP TO 30% ON YOUR
MONTHLY ENERGY BILL**



Help for Individuals, Couples and Larger Households

At Southern California Edison (SCE), we understand household expenses can add up quickly. That's why we are pleased to offer you our California Alternate Rates for Energy (CARE) program. With CARE, you will save every month on your monthly electric bill. That's money-savings 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%.

Receive a discount of up to 30% on your electric bill each and every 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.

Maximum Household Income Effective June 1, 2022	
Persons in Household	Total Combined Annual Income†
1 – 2	Up to \$36,620
3	Up to \$46,060
4	Up to \$55,500
5	Up to \$64,940
6	Up to \$74,380
7	Up to \$83,820
8	Up to \$93,260
Each additional person	\$9,440

† 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.

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.

Free Home Appliances

With our Energy Savings Assistance (ESA) program, SCE will cover the cost to provide qualified customers with new energy-efficient appliance upgrades and other energy-saving services. Apply online at sce.com/esa or call 1-800-736-4777.

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.

Medical Baseline Program

If you or someone in your household requires the regular use of electrically-powered medical equipment or other qualifying medical devices, you may be eligible for our Medical Baseline Allowance program. Visit sce.com/mba.

Discounted Phone Services

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 or call 1-866-272-0349.

Free or Reduced Home Internet Service

The federally-funded Affordable Connectivity Program (ACP) provides eligible households with a \$30 monthly discount on home Internet plans. Use the ACP discount with low-cost Internet plans that cost less than \$30 per month and receive the Internet for free. Call 1-866-519-8655 or visit internetforallnow.org/getconnected to learn more.

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.

Call Center Outreach


SCE's CCC continues using various methods to directly enroll customers in the CARE program during incoming calls. CARE is offered on all new customer turn-on requests and/or when customers express a need for help with their bill or other 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 send a printed application to the customer if they prefer to sign up via standard mail. These enrollment options provide customers with choices and maximizes their opportunity to enroll in the CARE program.

SCE.com Website

SCE's website 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. SCE continually updates [Help Paying Your Bill | Your Home | Home - SCE](#) 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); 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/residential/assistance which directs customers to internetforallnow.org/applynow.

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

SCE.com Billing Assistance Programs Page



EDISON
Energy for What's Ahead®

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

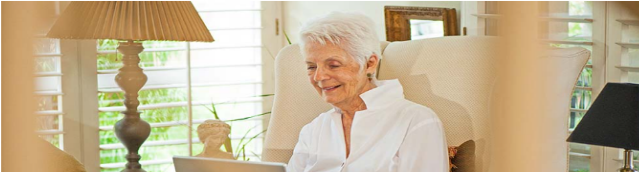
Outage Center

Safety

Wildfire Safety

Bill Assistance Programs

Home > Your Home > Help Paying Your Bill



Need Time to Pay Your Bill?
We're here to help with long-term and short-term assistance programs. Explore all your options here.

12-month Payment Arrangements Plan

Residential customers with a past due balance may qualify for a 12-month repayment plan. Log in to [MyAccount](#) to request a payment arrangement

Income Qualified Programs

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

Learn More >

Energy Assistance Fund

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 >

Energy Savings Assistance Program

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, the Administration for Children and Families, and the Office of Community Services.

Learn More >

Budget Billing Plan

To help you budget your monthly expenses, SCE offers our [Budget Billing Plan](#) > to help you split the cost of the energy you use into 11 equal payments throughout the year.

Learn More >

Arrearage Management Plan (AMP)

Customers enrolled in CARE or FERA with past-due bills at least 90 days old totaling \$500 or more, and who has been a customer of

Medical Baseline Allowance Program

Users of electrically powered medical equipment may qualify for an additional 16.5 kilowatt-hours per day at the lowest baseline rate

Budget Assistant

You can keep an eye on your energy usage with [Budget Assistant](#) >. This easy-to-use feature compares your account's projected next bill to your spending goals and sends

Feedback

25

Arrearage Management Plan (AMP)

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

[Learn More >](#)

Medical Baseline Allowance Program

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

[Learn More >](#)

Budget Assistant

You can keep an eye on your energy usage with [Budget Assistant >](#). This easy-to-use feature compares your account's projected next bill to your spending goals and sends you an alert to let you know how you're doing. You can choose whether you receive alerts via email, phone, or text, and how often you want to be notified. [Get Started >](#)

[Learn More >](#)

Summer Discount Plan

When you sign up, SCE will install a remote-controlled device on or near your air conditioner at no cost to you. This will allow us to turn off or cycle your A/C unit during energy events throughout the year based on your program preferences. You'll earn bill credits from June 1 to October 1 for participating.

[Learn More >](#)

Low-Cost Internet and Computers

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

Learn more at internetforallnow.org/applynow or call (866) 519-8655.

Feedback

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

Leveraging Current Partnerships

SCE continues to leverage its network of CBOs and FBOs to promote the CARE/FERA Programs. This network of agencies to promotes customer outreach by way of email and telephone. This outreach includes educating customers on the number of ways to enroll in the CARE/FERA programs, 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, religious groups, homeless prevention programs, family outreach and assistance, and food banks.

Capitation Fee Program

The Capitation Fee Program is intended to encourage CBOs to partner with SCE to assist with SCE's hardest-to-reach customer populations with enrollment in the CARE and FERA programs. The Program reimburses organizations helping

income-qualified customers gain assistance through the CARE or FERA programs.

The Capitation Fee Program team is continuing its efforts to engage existing Capitation Agencies (those CBOs participating in the Capitation Fee Program) 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. As part of SCE’s strategy to bolster FERA enrollments, SCE is endeavoring to recruit Capitation Agencies dedicated to recruiting FERA customers.

SCE currently has 60 Capitation Agencies. In March, capitation contractors and outbound calling efforts successfully enrolled 261 new customers in the CARE/FERA programs.⁹ 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.

CARE Capitation Agencies	
ESA Leads	NA
CARE Enrollments	259
CARE Recertification	NA

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. EAF is an income-qualified program that helps residential households pay their electric bills. EAF is funded through voluntary donations from SCE employees, shareholders, and customers. EAF partners with United Way of Greater Los Angeles and 80+ CBOs to process assistance requests and

⁹ 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.

applications. In March 2023, 252 customers who received EAF grants were enrolled in CARE.

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 programs available to qualifying customers.

Community Outreach & Engagement

SCE continued its collaboration with CBOs by sharing information about rates, wildfire and emergency preparedness, CARE/FERA/ESA, and Medical Baseline Allowance to be shared with each CBO’s respective constituents.

Tribal Outreach

See *Section 1.2.1* Tribal Outreach.

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.

During March 2023, SCE received three recertification complaints. All complaints were related to recertification removals. All complaints resulted in program reinstatement and one bill correction (to apply retroactive credit).

2.4. Miscellaneous

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 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
1/4/2023	Winter Storms	Multiple Counties
2/1/2023 - 3/31/2023	Winter Storms	Multiple Counties

Recertification Extensions

SCE identified that SCE's 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 Recertification Date	Batch Date (RECERT Date - 90 days) 2023	Current Count of Records	Extra/Less than optimum (4500)	RECERT date Move-to	Move Ahead Days	Remarks	Expected New Count
1/7/2023	10/9/2022	6784	-2284	1/10/2023	3	Move to 1/10/2023	4500
1/8/2023	10/10/2022	6475	-1975	1/11/2023	3	Move to 1/11/2023	4500
1/9/2023	10/11/2022	6162	-1662	1/17/2023	8	Move to 1/17/2023	4500
1/10/2023	10/12/2022	1464	3036	N/A	N/A	N/A	3748
1/11/2023	10/13/2022	518	3982	N/A	N/A	N/A	2493

2.5. Pilots and Studies

2.5.1. CARE Program Studies

2025 Low Income Needs Assessment (LINA) Study

Refer to ESA *Section 1.5.1 2025 Low Income Needs Assessment (LINA) Study*.

ESA/CARE Categorical Study

Refer to *Section 1.5.1* ESA/CARE Categorical Study.

CARE CHANGES Evaluation

The Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program is modeled after the CPUC's Telecommunications Education and Assistance in Multiple Languages (TEAM) program. In particular, CHANGES was developed to assist Limited English Proficient (LEP) customers with utility bill disputes and manage their natural gas and electricity services. PG&E is managing the contract on behalf of the IOUs and the CPUC.

The CPUC's Customer Affairs Division is leading the evaluation of CHANGES with assistance from ED staff. The current evaluation is being conducted by Opinion Dynamics. The consultant has completed the primary data collection and is analyzing data and drafting the report. The study team provided input and comments on the table of contents and overall plan for the report. An initial draft report was provided in March 2023. The study team and consultant are reviewing input. A semi-final draft report will be presented to the public for additional input in April after which the consultant will incorporate input and finalize the report. The study is expected to be completed in May 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, 2022. 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. The pilot will continue through the end of April 2023.

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.¹⁰ Income qualified customers include residential single-family households and customers in sub-metered residential facilities.

3.1.1. Please provide FERA Program summary costs.

The following table provides the FERA budget and expenses by category.¹¹

FERA Budget Categories	Authorized Budget	Expenses Year-to-Date	% of 2022 Budget Spent
Outreach	\$ 729,765	\$ 25,643 ¹²	4%
Processing / Certification Re-certification	\$ 392,986	\$ 26,157	7%
Post Enrollment Verification	\$ 124,101	\$ 2,330	2%
IT Programming	\$ 30,000	\$ 1,508	5%
Pilot(s)	\$ -	\$ -	0%
Studies	\$ 54,000	\$ -	0%
Regulatory Compliance	\$ 18,797	\$ -	0%
General Administration	\$ 44,420	\$ 2,805	6%
CPUC Energy Division	\$ 4,375	\$ -	0%
Total Expenses	\$ 1,398,444	\$ 58,443	4%
Subsidies and Benefits	\$ 37,353,692	\$ 2,383,302	6%

¹⁰ Public Utilities Code § 739.12.

¹¹ FERA budget reflects what was authorized in D.21-06-015 at 472, OP 1.

¹² Decrease in YTD expense due to \$6,992 credit issued by the vendor. Vendor will be rebilling SCE in April for a revised amount.

Total Program Costs & Discounts	\$ 38,752,136	\$ 2,441,744	6%
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3.1.2. Provide the FERA Program enrollment rate to date.

FERA Enrollment		
Participants Enrolled	Eligible Participants¹³	Enrollment Rate
26,226	223,982	12%

3.2. Outreach

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

FERA outreach efforts and communications mirror and often work in conjunction with SCE's CARE outreach efforts, including partnerships with internal stakeholders (SCE's Consumer Affairs, Corporate Communications) and external agencies (FBOs, CBOs). Like for the CARE program, all customers who contact SCE's CCC to request payment arrangements have the opportunity to sign up for FERA immediately if they qualify. SCE's in-language and underpenetrated areas continue to be a priority for FERA enrollment.

SCE is ramping up outreach activities specific to FERA customers to meet the 50% penetration goal by 2023.¹⁴ This campaign will help target FERA customers in different ways 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, CBOs, and banner ads in applications. SCE will increase its digital communication and email methodology for efficient and effective marketing to grow FERA participation.

Direct Marketing


SCE targets customers who may be eligible for and benefit from the FERA program. In March 2023, approximately 108,785 emails and approximately

¹³ On April 13, 2023, PG&E, on behalf of the IOUs, filed the Annual Estimates of CARE and FERA Eligible Customers and Related Information. This number reflects estimates of SCE's FERA Eligible Participants for 2023.

¹⁴ D.21-06-015, OP 24.


54,599 direct mail pieces were sent to potential FERA-eligible applicants. See an illustration of a marketing piece, below.

FERA Marketing Piece



«Date»

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



**YOU COULD SAVE 18%
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 we are pleased to offer you our **Family Electric Rate Assistance (FERA)** program. With FERA, you will save every month on your monthly electric bill. That's money-savings 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 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.

Maximum Household Income
Effective June 1, 2022

Persons in Household	Total Combined Annual Income ¹
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

¹Current 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.

Free Home Appliances

With our **Energy Savings Assistance (ESA)** program, SCE will cover the cost to provide qualified customers with new energy-efficient appliance upgrades and other energy-saving services. Apply online at sce.com/esa or call 1-800-736-4777.

Medical Baseline Program

If you or someone in your household requires the regular use of electrically-powered medical equipment or other qualifying medical devices, you may be eligible for our **Medical Baseline Allowance** program. Visit sce.com/mbi.

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.

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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Discounted Phone Services

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 or call 1-866-272-0349.

Free or Reduced Home Internet Service

The federally-funded **Affordable Connectivity Program (ACP)** provides eligible households with a \$30 monthly discount on home Internet plans. Use the ACP discount with low-cost Internet plans that cost less than \$30 per month and receive the Internet for free. Call 1-866-519-8655 or visit internetforallnow.org/getconnected to learn more.

Community Outreach & Engagement

See *Section 2.2.2* for joint Community Outreach and Engagement with CARE.

FERA Partners (Capitation Agencies)

Capitation Agencies	
ESA Leads	N/A
FERA Enrollments	2
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 CARE recertification efforts, with the nature of the complaints and resolution.

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

3.4. Pilots and Studies

3.4.1. FERA Program Studies

No activities to report.

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) Building Electrification, Clean Energy Homes, 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 (MF CAM)

ESA Program - Table 2B - Program Expenses & Energy Savings by Measures Installed (MFWB)

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

ESA Program - Table 2D - Program Expenses & Energy Savings by Measures Installed (Building Electrification Pilot)

ESA Program - Table 2E - Program Expenses & Energy Savings by Measures Installed (Clean Energy Homes)

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

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

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

ESA Program - Table 5A, 5B, 5C, 5D, 5E & 5F - 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 March 2023

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) [1] [4]	\$ 46,991,319	\$ -	\$ 46,991,319	\$ 1,444,058	\$ -	\$ 1,444,058	\$ 3,998,338	\$ -	\$ 3,998,338	9%	0%	9%
ESA Multifamily In-Unit [2]	\$ 2,708,604	\$ -	\$ 2,708,604	\$ 56,856	\$ -	\$ 56,856	\$ 89,205	\$ -	\$ 89,205	3%	0%	3%
ESA Multifamily Common Area Measures [2]	\$ 1,458,479	\$ -	\$ 1,458,479	\$ 587,757	\$ -	\$ 587,757	\$ 659,861	\$ -	\$ 659,861	45%	0%	45%
ESA Multifamily Whole Building [3]	\$ 4,167,086	\$ -	\$ 4,167,086	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
ESA Pilot Plus and Pilot Deep	\$ 3,884,864	\$ -	\$ 3,884,864	\$ 178,297	\$ -	\$ 178,297	\$ 205,497	\$ -	\$ 205,497	5.3%	0%	5.3%
Building Electrification Retrofit Pilot (SCE Only)	\$ 8,027,056	\$ -	\$ 8,027,056	\$ 28,444	\$ -	\$ 28,444	\$ 20,165	\$ -	\$ 20,165	0.3%	0%	0.3%
Clean Energy Homes New Construction Pilot (SCE Only) [4]	\$ 1,890,000	\$ -	\$ 1,890,000	\$ 9,336	\$ -	\$ 9,336	\$ 66,315	\$ -	\$ 66,315	3.5%	0%	3.5%
CSD Leveraging	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
SASH/MASH Unspent Funds [5]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
ESA Program TOTAL	\$ 69,127,408	\$ -	\$ 69,127,408	\$ 2,304,748	\$ -	\$ 2,304,748	\$ 5,039,380	\$ -	\$ 5,039,380	7%	0%	7%

[1] Starting in 2023, data shown is for SF and MH only and excludes MF in-unit, which is now shown separately.

[2] Data shown is for January through June 2023. The new MFWB program is scheduled to launch in July 2023.

[3] Data shown is for MFWB, scheduled to launch in July 2023. MFWB budget shown reflects a 10% reduction for IOU Admin.

[4] Reflects the revised budget approved in AL 4664-E, December 15, 2021. Separate AL will be submitted to transfer the difference of the CEH funds to ESA Main Program.

[5] OP 12 of D.15-01-027 states "The Program Administrators shall ensure that program expenditures in each utility's service territory do not exceed the total authorized budget amounts over the duration of the programs. The program incentive budgets will be available until all funds are exhausted or until December 31, 2021, whichever occurs first. Any money unspent and unencumbered on January 1, 2022, shall be used for "cost-effective energy efficiency measures in low-income residential housing that benefit ratepayers," as set forth in Public Utilities Code Section 2852(c)(3)." The electric IOUs plan to file a Joint Advice Letter for disposal of unspent funds from the SASH and MASH programs to the ESA Program. Joint IOUs plan to file Advice Letter in Quarter 1 of 2023. After the Advice Letter is filed, budget authorization will be pending per Energy Division disposition of

**Energy Savings Assistance Program Table 1 - Main (SF, MH, MF In-Unit) Expenses
Southern California Edison
Through March 2023**

Appliances	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:												
Energy Efficiency	\$ 38,991,059		\$ 38,991,059									
Appliances			\$ -	\$ 19,462	\$ -	\$ 19,462	\$ 236,072	\$ -	\$ 236,072			
Domestic Hot Water			\$ -	\$ 118	\$ -	\$ 118	\$ 118	\$ -	\$ 118			
Enclosure			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
HVAC			\$ -	\$ 551,764	\$ -	\$ 551,764	\$ 2,133,834	\$ -	\$ 2,133,834			
Maintenance			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Lighting			\$ -	\$ 1,424	\$ -	\$ 1,424	\$ 481	\$ -	\$ 481			
Miscellaneous			\$ -	\$ 1,273	\$ -	\$ 1,273	\$ 66,483	\$ -	\$ 66,483			
Customer Enrollment			\$ -	\$ 41,602	\$ -	\$ 41,602	\$ 56,237	\$ -	\$ 56,237			
In Home Education			\$ -	\$ 6,998	\$ -	\$ 6,998	\$ 11,073	\$ -	\$ 11,073			
Pilot			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Energy Efficiency TOTAL	\$ 38,991,059		\$ 38,991,059	\$ 622,641	\$ -	\$ 622,641	\$ 2,504,298	\$ -	\$ 2,504,298	6%		6%
Training Center	\$ 450,488		\$ 450,488	\$ -	\$ -	\$ -	\$ 699	\$ -	\$ 699	0%		0%
Workforce Education and Training	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%		0%
Inspections	\$ 968,374		\$ 968,374	\$ 49,251	\$ -	\$ 49,251	\$ 131,057	\$ -	\$ 131,057	14%		14%
Marketing and Outreach	\$ 1,988,580		\$ 1,988,580	\$ 21,757	\$ -	\$ 21,757	\$ 27,657	\$ -	\$ 27,657	1%		1%
Studies	\$ 342,500		\$ 342,500	\$ 142	\$ -	\$ 142	\$ (4,356)	\$ -	\$ (4,356)	-1%		-1%
Regulatory Compliance	\$ 791,921		\$ 791,921	\$ 23,584	\$ -	\$ 23,584	\$ 66,002	\$ -	\$ 66,002	8%		8%
General Administration [2]	\$ 6,115,422		\$ 6,115,422	\$ 782,782	\$ -	\$ 782,782	\$ 1,354,334	\$ -	\$ 1,354,334	22%		22%
CPUC Energy Division	\$ 51,579		\$ 51,579	\$ 757	\$ -	\$ 757	\$ 7,852	\$ -	\$ 7,852	15%		15%
SPOC	\$ 171,929		\$ 171,929	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%		0%
Administration Subtotal	\$ 10,708,864		\$ 10,708,864	\$ 878,273	\$ -	\$ 878,273	\$ 1,583,245	\$ -	\$ 1,583,245	15%		15%
TOTAL PROGRAM COSTS	\$ 49,699,923		\$ 49,699,923	\$ 1,500,914	\$ -	\$ 1,500,914	\$ 4,087,543	\$ -	\$ 4,087,543	8%		8%
Funded Outside of ESA Program Budget												
Indirect Costs				\$ 125,258	\$ -	\$ 125,258	\$ 314,866	\$ -	\$ 314,866			
NGAT Costs												

[1] Budget authorized in D.21-06-015, Attachment 1.

[2] General Administration budget includes 10% of MFWB budget for IOU expenses.

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 March 2023

ESA Program Multifamily Whole Building	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 Multifamily In-Unit [1]	\$ 2,708,604		\$ 2,708,604	\$ 56,856	\$ -	\$ 56,856	\$ 89,205	\$ -	\$ 89,205	3%		3%
ESA Multifamily Common Area Measures [2]	\$ 1,458,479		\$ 1,458,479	\$ 587,757	\$ -	\$ 587,757	\$ 659,861	\$ -	\$ 659,861	45%		45%
ESA Multifamily Whole Building [3]	\$ 4,167,086		\$ 4,167,086	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%		0%
TOTAL	\$ 8,334,169	\$ -	\$ 8,334,169	\$ 644,613	\$ -	\$ 644,613	\$ 749,066	\$ -	\$ 749,066	9%		9%

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

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

[3] Expenditures for MFWB by end use is shown on ESA Table 2B. MFWB Implementation scheduled to occur July, 2023. MFWB budget reflects a 10% reduction for IOU Admin.

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

ESA Pilot Plus and Pilot Deep 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 Pilot Plus and Pilot Deep Program	\$ 3,884,864		\$ 3,884,864	\$ 178,297	\$ -	\$ 178,297	\$ 205,497	\$ -	\$ 205,497	5.3%		5.3%
TOTAL	\$ 3,884,864	\$ -	\$ 3,884,864	\$ 178,297	\$ -	\$ 178,297	\$ 205,497	\$ -	\$ 205,497	5.3%		5.3%

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

Energy Savings Assistance Program Table 1A-2 - Building Electrification Expenses (SCE Only)

ESA Building Electrification 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 Building Electrification Program	\$ 8,027,056		\$ 8,027,056	\$ 28,444	\$ -	\$ 28,444	\$ 20,165	\$ -	\$ 20,165	0.3%		0.3%
TOTAL	\$ 8,027,056	\$ -	\$ 8,027,056	\$ 28,444	\$ -	\$ 28,444	\$ 20,165	\$ -	\$ 20,165	0.3%		0.3%

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

Energy Savings Assistance Program Table 1A-3 - Clean Energy Homes Expenses (SCE Only)

ESA Clean Energy Homes 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 Clean Energy Homes Program	\$ 1,890,000		\$ 1,890,000	\$ 9,336	\$ -	\$ 9,336	\$ 66,315	\$ -	\$ 66,315	3.5%		3.5%
TOTAL	\$ 1,890,000	\$ -	\$ 1,890,000	\$ 9,336	\$ -	\$ 9,336	\$ 66,315	\$ -	\$ 66,315	3.5%		3.5%

Expenditures for Clean Energy Homes by end use is shown on ESA Table 2E.

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

ESA Program Leveraging - CSD	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 Program Leveraging - CSD			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%		0%
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%		0%

Expenditures for CSD Leveraging by end use is shown on ESA Table 2F.

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

Energy Savings Assistance Main Program Table 2 (SF, MH, MF In-Unit)
Southern California Edison
Through March 2023

		ESA Main Program (Summary)Total						
		Year-To-Date Completed & Expensed Installation						
Measures	Plus	Units	Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances								
High Efficiency Clothes Washer	x	Home	-	-	-	-	-	0.0%
Refrigerator		Home	163	95,474	11.46	-	233,799	9.3%
New - Clothes Dryer	NA	Each	-	-	-	-	-	0.0%
New - Dishwasher	x	Each	-	-	-	-	-	0.0%
Freezers	x	Each	2	1,696	0.20	-	2,274	0.1%
Domestic Hot Water								
Faucet Aerator		Home	-	-	-	-	-	0.0%
Other Domestic Hot Water [5]		Home	-	-	-	-	-	0.0%
Water Heater Tank and Pipe Insulation	x	Home	-	-	-	-	-	0.0%
Water Heater Repair/Replacement	NA	Home	-	-	-	-	-	0.0%
Low-Flow Showerhead / Combined Showerhead/TSV [8]		Home	-	-	-	-	-	0.0%
Heat Pump Water Heater - Electric	x	Each	-	-	-	-	-	0.0%
Heat Pump Water Heater - Gas	x	Each	-	-	-	-	-	0.0%
Heat Pump Water Heater - Propane	x	Each	-	-	-	-	-	0.0%
Thermostatic Tub Spout/Diverter	NA	Each	-	-	-	-	-	0.0%
Thermostatic Shower Valve		Each	2	96	0.02	-	118	0.0%
Thermostatic Shower Valve Combined Showerhead		Each	-	-	-	-	-	0.0%
New - Solar Water Heating	NA	Each	-	-	-	-	-	0.0%
Enclosure								
Air Sealing [1]	x	Home	-	-	-	-	-	0.0%
Caulking	NA	Home	-	-	-	-	-	0.0%
New - Diagnostic Air Sealing	NA	Home	-	-	-	-	-	0.0%
Attic Insulation	x	Home	-	-	-	-	-	0.0%
New - Attic Insulation CAC NonElect Heat [6]	x	Home	-	-	-	-	-	0.0%
New - Floor Insulation	NA	Home	-	-	-	-	-	0.0%
HVAC								
Removed - FAU Standing Pilot Conversion	NA	Home	-	-	-	-	-	0.0%
Furnace Repair/Replacement	NA	Home	-	-	-	-	-	0.0%
Room A/C Replacement	x	Home	11	(1,700)	(0.26)	-	10,058	0.4%
Central A/C Replacement	x	Home	287	95,256	14.29	-	1,892,191	75.6%
Heat Pump Replacement	x	Home	10	12,445	5.60	-	69,086	2.8%
New - Heat Pump Replacement - CAC Gas	x	Each	-	-	-	-	-	0.0%
New - Heat Pump Replacement - CAC Propane	x	Each	-	-	-	-	-	0.0%
Evaporative Cooler (Replacement)	x	Home	-	-	-	-	-	0.0%
Evaporative Cooler (Installation)	x	Home	53	29,733	4.46	-	69,675	2.8%
Duct Test and Seal [7]	NA	Home	295	-	-	-	56,210	2.2%
Energy Efficient Fan Control	x	Home	-	-	-	-	-	0.0%
New - Prescriptive Duct Sealing	NA	Home	-	-	-	-	-	0.0%
High Efficiency Forced Air Unit (HE FAU)	NA	Home	-	-	-	-	-	0.0%
Removed - A/C Time Delay	NA	Home	-	-	-	-	-	0.0%
Smart Thermostat		Home	120	36,621	-	-	36,614	1.5%
New - Portable A/C	x	Each	-	-	-	-	-	0.0%
New - Wholehouse Fan	NA	Each	-	-	-	-	-	0.0%
Maintenance								
Furnace Clean and Tune	NA	Home	-	-	-	-	-	0.0%
Central A/C Tune up	x	Home	-	-	-	-	-	0.0%
New - Condenser Coil Cleaning	x	Each	-	-	-	-	-	0.0%
New - Fan Control Adjust	x	Each	-	-	-	-	-	0.0%
New - Refrigerant Charge Adjustment	x	Each	-	-	-	-	-	0.0%
New - Evaporator Coil	x	Each	-	-	-	-	-	0.0%
HVAC Air Filter Service	x	Home	-	-	-	-	-	0.0%
New - Evaporative Cooler - Maint Functioning	x	Each	-	-	-	-	-	0.0%
New - Evaporative Cooler - Maint Non-Functioning	x	Each	-	-	-	-	-	0.0%
Lighting								
Removed - Interior Hard wired LED fixtures	NA	Each	-	-	-	-	-	0.0%
Exterior Hard wired LED fixtures		Each	-	-	-	-	-	0.0%
Removed - LED Torchiers		Each	(12)	(899)	(0.10)	-	(798)	0.0%
Removed - Occupancy Sensor	NA	Each	-	-	-	-	-	0.0%
Removed - LED Night Light	NA	Each	-	-	-	-	-	0.0%
LED Reflector Bulbs		Each	18	409	0.05	-	102	0.0%
LED A-Lamps		Each	215	8,425	1.15	-	1,178	0.0%
Miscellaneous								
Pool Pumps	x	Home	44	43,544	13.50	-	65,458	2.6%
Power Strip	NA	Home	-	-	-	-	-	0.0%
Power Strip Tier II		Each	39	5,594	1.29	-	1,025	0.0%
NEW - Air Purifier	NA	Home	-	-	-	-	-	0.0%
Cold Storage	NA	Each	-	-	-	-	-	0.0%
New - Comprehensive Home Health and Safety Check-up	NA	Home	-	-	-	-	-	0.0%
New - CO and Smoke Alarm	NA	Each	-	-	-	-	-	0.0%
Pilots								
Customer Enrollment								
ESA Outreach & Assessment		Home	437	-	-	-	\$ 56,237	2.2%
ESA In-Home Energy Education		Home	403	-	-	-	\$ 11,073	0.4%
Total Savings/Expenditures				326,693	51.66	-	\$ 2,504,299	
Total Households Weatherized [2]			-					
Households Treated		Total						
- Single Family Households Treated		Home	172					
- Multi-family Households Treated (In-unit)		Home	9					
- Mobile Homes Treated		Home	17					
Total Number of Households Treated [3]			Home	198				
# Eligible Households to be Treated for PY			Home	37,871				
% of Households Treated			%	0.5%				
- Master-Meter Households Treated			Home	5				

ESA Program - Main	Year to Date Expenses			
	Electric	Gas	Total	
Administration [9]			\$ -	
Direct Implementation (Non-Incentive)			\$ -	
Direct Implementation	\$ 2,504,299		\$ 2,504,299	<<Includes measures costs
TOTAL ESA Main COSTS	\$ 2,504,299	\$ -	\$ 2,504,299	

[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 2023 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.

[5] Other Domestic Hot Water is Faucet Aerators and Low Flow Showerheads.

[6] Attic insulation for homes not heated by electricity or IOU-provided natural gas. Must have central AC.

[7] SCE performs Duct Test and Seal only as required by Title 24 as part of HVAC replacements. Costs and savings are embedded in the HVAC costs and savings.

[8] Low Flow Showerhead/ Combined Showerhead/TSV includes only low flow showerheads for SCE.

[9] Please see ESA Table 1A.

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 Common Area Measures Program Table 2A
Southern California Edison
Through March 2023

ESA Program - Multifamily Common Area Measures⁵								
Year-To-Date Completed & Expensed Installation								
	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTU/h and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
ESA CAM Measures[1]								
Appliances								
Domestic Hot Water								
Central Boiler**	Cap-kBTU/h	-	-	-	-	-	\$ -	0.0%
Faucet Aerator	Each	-	-	-	-	-	\$ -	0.0%
Pipe Insulation	Home	-	-	-	-	-	\$ -	0.0%
Envelope								
								0.0%
HVAC								
								0.0%
AC Tune-up**	Cap-Tons	-	-	-	-	-	\$ -	0.0%
Furnace Replacement**	Cap-kBTU/h	-	-	-	-	-	\$ -	0.0%
HEAT Pump Split System**	Cap-Tons	-	-	-	-	-	\$ -	0.0%
HEAT Pump Split System	Each	-	-	-	-	-	\$ -	0.0%
Programmable Thermostat	Each	3	-	463	-	-	\$ 675	0.1%
Inspection	Each	13	-	-	-	-	\$ 2,730	0.4%
Lighting								
Exterior Parking Lot	Each	10	-	2,829	-	-	\$ 2,698	0.4%
LED A-Lamp	Each	226	-	51,660	1.02	-	\$ 3,627	0.5%
LED Exit Sign	Each	61	-	21,981	3.56	-	\$ 4,196	0.6%
Exterior LED Fixture	Fixture	2,297	-	121,630	-	-	\$ 381,137	57.8%
Exterior LED Lighting	Fixture	-	-	-	-	-	\$ -	0.0%
Exterior LED Lighting - Pool	Lamp	-	-	-	-	-	\$ -	0.0%
Interior LED Exit Sign	Fixture	-	-	-	-	-	\$ -	0.0%
Interior LED Fixture	Fixture	2,351	-	53,719	6.24	-	\$ 254,620	38.6%
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	54	-	4,129	0.04	-	\$ 783	0.1%
LED Reflector Lamp	Each	70	-	641	0.01	-	\$ 2,700	0.4%
Miscellaneous								
Tier-2 Smart Power Strip	Each	-	-	-	-	-	\$ -	0.0%
Variable Speed Pool Pump	Each	-	-	-	-	-	\$ -	0.0%
Enrollment Fees								
Enrollment Fees	Home	13	-	-	-	-	\$ 6,695	1.0%
Ancillary Services								
Audit*		-	-	-	-	-	\$ -	0.0%
Total		5,098	-	257,052	10.88	-	\$ 659,861	

Multifamily Properties Treated (Common Area Measures and Whole Building)	Number
Total Number of Multifamily Properties Treated²	22
Subtotal of Master-metered Multifamily Properties Treated	0
Total Number of buildings w/in Properties Treated	22
Total Number of Multifamily Tenant Units w/in Properties Treated³	1,805

Multifamily Households Treated (In-Unit)	Number
Total Number of households individually treated (in-unit)	245

ESA Program - Multifamily Common Area	Year to Date Expenses		
	Electric	Gas	Total
Administration			\$ -
Direct Implementation (Non-Incentive)			\$ -
Direct Implementation	\$ 659,861		\$ 659,861
<<Includes measures costs			
TOTAL MF CAM COSTS	\$ 659,861	\$ -	\$ 659,861

[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] 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. This calculation has been amended to reflect the total number of units within the properties treated.

[4] Per D.16-11-022 at p.210, the CPUC imposes a cap of 10% on ESA CAM Initiative funds for administrative activities and a ceiling of 20% for direct implementation non-

[5] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.

* Note: Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are income eligible based

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

Note: Implementation of the MF CAM Initiative AL 3196-E-A_2654-G-A was approved effective 5/30/2018.

** Note: This represents the unit of measure such as Cap Tons and Cap kBTU/h. It is not a count of each measure installed or each home the measure was installed in.

Energy Savings Assistance Program - Multifamily Whole Building (MF CAM, MF In-Unit, WFWB) Table 2B
Southern California Edison
Through March 2023

ESA Program - MFWB								
Year-To-Date Completed & Expensed Installation								
ESA MFWB Measures[1]	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTU/h and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances								
Domestic Hot Water								
Central Boiler**	Cap-kBTU/h	-	-	-	-	-	\$ -	-
Faucet Aerator	Each	-	-	-	-	-	\$ -	-
Pipe Insulator	Home	-	-	-	-	-	\$ -	-
Envelope								
HVAC								
AC Tune-up**	Cap-Tons	-	-	-	-	-	\$ -	-
Furnace Replacement**	Cap-kBTU/h	-	-	-	-	-	\$ -	-
HEAT Pump Split System**	Cap-Tons	-	-	-	-	-	\$ -	-
HEAT Pump Split System	Each	-	-	-	-	-	\$ -	-
Programmable Thermostat	Each	-	-	-	-	-	\$ -	-
Lighting								
Exterior LED Lighting	Fixture	-	-	-	-	-	\$ -	-
Exterior LED Lighting - Pool	Lamp	-	-	-	-	-	\$ -	-
Interior LED Exit Sign	Fixture	-	-	-	-	-	\$ -	-
Interior LED Fixture	Fixture	-	-	-	-	-	\$ -	-
Interior LED Lighting	KiloLumen	-	-	-	-	-	\$ -	-
Interior LED Screw-in	Lamp	-	-	-	-	-	\$ -	-
Interior TLED Type A Lamps	Lamp	-	-	-	-	-	\$ -	-
Interior TLED Type C Lamps	Lamp	-	-	-	-	-	\$ -	-
Miscellaneous								
Tier-2 Smart Power Strip	Each	-	-	-	-	-	\$ -	-
Variable Speed Pool Pump	Each	-	-	-	-	-	\$ -	-
Ancillary Services								
Audit ^f		-	-	-	-	-	\$ -	-
Total			-	-	-	-	\$ -	-

Multifamily Properties Treated (Common Area Measures and Whole Building)	Number
Total Number of Multifamily Properties Treated	0
Subtotal of Master-metered Multifamily Properties Treated	0
Total Number of buildings w/in Properties Treated	0
Total Number of Multifamily Tenant Units w/in Properties Treated ^d	0

Multifamily Households Treated (In-Unit)	Number
Total Number of households individually treated (in-unit)	0

ESA Program - MFWB	Year to Date Expenses		
	Electric	Gas	Total
Administration			\$ -
Direct Implementation (Non-Incentive)			\$ -
Direct Implementation			\$ -
TOTAL MFWB COSTS	\$ -	\$ -	\$ -

<<Includes measures costs

** Note: This represents the unit of measure such as Cap Tons and Cap kBTU/h. It is not a count of each measure installed or each home the measure was installed in.

MFWB Implementation to occur no earlier than July 2023.

Energy Savings Assistance Program Table 2C Pilot Plus and Pilot Deep
Southern California Edison
Through March 2023

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%
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						

ESA Program - Pilot Plus and Pilot Deep	Year to Date Expenses			
	Electric	Gas	Total	
Administration			\$ -	
Direct Implementation (Non-Incentive)			\$ -	
Direct Implementation			\$ -	<<Includes measures costs
TOTAL Pilot Plus and Pilot Deep COSTS	\$ -	\$ -	\$ -	

[1] As of March 2023, Pilot Plus/Pilot Deep has not commenced installation activities.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.
Note: IOUs - If there are new measures that are approved through the ESA Working Group, mark in column A as such to indicate that it is a new measure.

Energy Savings Assistance Program Table 2D
Southern California Edison
Through March 2023

Measures	Units	ESA Program - Building Electrification Retrofit Pilot [1][4]					
		Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances							
Electric Dryer	Each	-	-	-	-	\$ -	0.0%
Heat Pump Dryer	Each	-	-	-	-	\$ -	0.0%
Induction Cooktop	Each	-	-	-	-	\$ -	0.0%
Induction Range	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water							
Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%
Enclosure							
Attic Insulation	Home	-	-	-	-	\$ -	0.0%
HVAC							
Heat Pump HVAC	Each	-	-	-	-	\$ -	0.0%
Duct Seal	Each	-	-	-	-	\$ -	0.0%
Smart Thermostat	Each	-	-	-	-	\$ -	0.0%
Miscellaneous [2]							
Minor Home Repair	Home	-	-	-	-	\$ -	0.0%
Carbon Monoxide/Smoke Alarm	Each	-	-	-	-	\$ -	0.0%
Electric Panel	Each	-	-	-	-	\$ -	0.0%
Electric Sub-Panel	Each	-	-	-	-	\$ -	0.0%
Electrical Circuit Run	Each	-	-	-	-	\$ -	0.0%
Induction Cookware	Home	-	-	-	-	\$ -	0.0%
Customer Enrollment							
Energy Assessment	Home	-	-	-	-	\$ -	0.0%
Total Savings/Expenditures			-	-	-	\$ -	0.0%
Households Treated	Total						
Single Family Households Treated	Home						
Estimated Avg. Annual Bill Savings Treated [3]	Home						

ESA Program - Building Electrification	Year to Date Expenses		
	Electric	Gas	Total
Administration			\$ -
Direct Implementation (Non-Incentive)			\$ -
Direct Implementation			\$ -
			<<Includes measures costs
TOTAL Building Electrification COSTS	\$ -	\$ -	\$ -

- [1] The costs for the following measures are included in the overall expenditures of the BE Pilot: additional line set for ductless mini-splits and building permits.
[2] These measures do not have any savings associated and may be required to complete the installation to electrify the residential end-uses of participating households.
[3] Estimated average annual bill savings will be calculated prior to participation and must not increase total energy costs.
[4] No activity as of March 2023.

Energy Savings Assistance Program Table 2E
Southern California Edison
Through March 2023

Measures	Units	ESA Program - Clean Energy Homes New Construction Pilot [1]			
		Year-To-Date Completed & Expensed Installation			
		Quantity	Avoided (CO ₂ e) emissions	Incentives Paid (\$)	% of Expenditure
Education and Outreach					
Direct Outreach (Developers and Owners)	Each	-	N/A	\$ -	0.0%
Educational Webinars	Each	-	N/A	\$ -	0.0%
Technical Design Assistance (Reserved)					
Single-Family Homes	Each	-	-	\$ -	0.0%
Multifamily Properties	Each	-	-	\$ -	0.0%
• Buildings	Each				
• No. of Dwelling Units	Each	-	-	\$ -	0.0%
Technical Design Assistance (In Process)					
Single-Family Homes	Home	-	-	\$ -	0.0%
Multifamily Properties	Each	-	-	\$ -	0.0%
• Buildings	Each	-	-	\$ -	0.0%
• No. of Dwelling Units	Each	-	-	\$ -	0.0%
Technical Design Assistance (Completed)					
Single-Family Homes	Each				
Multifamily Properties	Each	-	-	\$ -	0.0%
• Buildings	Each	-	-	\$ -	0.0%
• No. of Dwelling Units					
	Home	-		\$ -	0.0%
	Home	-		\$ -	0.0%
Total Savings/Expenditures			-	\$ -	0.0%
Households Treated		Total			
- Single Family Households Treated	Home				
- Multifamily Dwelling Units Treated	Home				
Total Number of Households Treated	Home				

ESA Program - Clean Energy Homes	Year to Date Expenses		
	Electric	Gas	Total
Administration			\$ -
Direct Implementation (Non-Incentive)			\$ -
Direct Implementation			\$ -
TOTAL Clean Energy Homes COSTS	\$ -	\$ -	\$ -

<<Includes measures costs

[1] No activity due to CEH program launch date of mid April.

Energy Savings Assistance Program Table 2F
Southern California Edison
Through March 2023

Measures	Plus	Units	ESA Program - CSD Leveraging					
			Year-To-Date Completed & Expensed Installation					
			Quantity Installed	kWh [3] (Annual)	kW [3] (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances								
High Efficiency Clothes Washer	x	Home						
Refrigerator		Home						
New - Clothes Dryer	NA	Each						
New - Dishwasher	X	Each						
Freezers	X	Each						
Domestic Hot Water								
Faucet Aerator		Home						
Other Domestic Hot Water		Home						
Water Heater Tank and Pipe Insulation [4]	x	Home						
Water Heater Repair/Replacement	NA	Home						
Low-Flow Showerhead / Combined Showerhead/TSV [7]	NA	Home						
Heat Pump Water Heater - Electric	x	Each						
Heat Pump Water Heater - Gas	x	Each						
Heat Pump Water Heater - Propane	x	Each						
Thermostatic Tub Spout/Diverter	NA	Each						
Thermostatic Shower Valve		Each						
Thermostatic Shower Valve Combined Showerhead		Each						
New - Solar Water Heating	NA							
Enclosure								
Air Sealing [1]	x	Home						
Caulking	NA	Home						
New - Diagnostic Air Sealing	NA	Home						
Attic Insulation	x	Home						
Attic Insulation CAC NonElect Heat [5]	x	Home						
New - Floor Insulation	NA	Home						
HVAC								
Removed - FAU Standing Pilot Conversion	NA	Home						
Furnace Repair/Replacement	NA	Home						
Room A/C Replacement	x	Home						
Central A/C Replacement	x	Home						
Heat Pump Replacement	x	Home						
New - Heat Pump Replacement - CAC Gas	x	Each						
New -Heat Pump Replacement - CAC Propane	x	Each						
Evaporative Cooler (Replacement)	x	Home						
Evaporative Cooler (Installation)	x	Home						
Duct Test and Seal [6]	NA	Home						
Energy Efficient Fan Control	x	Home						
New - Prescriptive Duct Sealing	NA	Home						
High Efficiency Forced Air Unit (HE FAU)	NA	Home						
Removed - A/C Time Delay	NA	Home						
Smart Thermostat		Home						
New - Portable A/C	x	Each						
New - Wholehouse Fan	NA	Each						
Maintenance								
Furnace Clean and Tune	NA	Home						
Central A/C Tune up	x	Home						
New - Condenser Coil Cleaning	x	Each						
New - Fan Control Adjust	x	Each						
New - Refrigerant Charge Adjustment	x	Each						
New - Evaporator Coil	x	Each						
HVAC Air Filter Service	x	Home						
New - Evaporative Cooler - Maint Functioning	x	Each						
New - Evaporative Cooler - Maint Non-Functioning	x	Each						
Lighting								
Removed - Interior Hard wired LED fixtures	NA	Each						
Exterior Hard wired LED fixtures		Each						
Removed - LED Torchiere		Each						
Removed - Occupancy Sensor	NA	Each						
Removed - LED Night Light	NA	Each						
LED Reflector Bulbs		Each						
LED A-Lamps		Each						
Miscellaneous								
Pool Pumps	x	Home						
Power Strip	NA	Home						
Power Strip Tier II		Each						
NEW - Air Purifier	NA	Home						
Cold Storage	NA	Each						
New - Comprehensive Home Health and Safety Check-up	NA	Home						
New - CO and Smoke Alarm	NA	Each						
Pilots								
Customer Enrollment								
ESA Outreach & Assessment		Home						
ESA In-Home Energy Education		Home						
Total Savings/Expenditures								
Total Households Weatherized [2]								
CSD MF Tenant Units Treated								
				Total				
				-				

ESA Program - CSD Leveraging	Year to Date Expenses		
	Electric	Gas	Total
Administration			\$ -
Direct Implementation (Non-Incentive)			\$ -
Direct Implementation			\$ -
TOTAL CSD Leveraging COSTS			
	\$ -	\$ -	\$ -

<<Includes measures costs

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 Tables 3A-H - Energy Savings and Average Bill Savings per Treated Home/Common Area
Southern California Edison
Through March 2023

Table 3A, ESA Program (SF, MH, MF In-Unit)	
Annual kWh Savings	326,693
Annual Therm Savings	
Lifecycle kWh Savings	3,786,519
Lifecycle Therm Savings	
Current kWh Rate	\$ 0.14
Current Therm Rate	
Average 1st Year Bill Savings / Treated Households	\$ 229
Average Lifecycle Bill Savings / Treated Households	\$ 2,658

Table 3B, ESA Program - Multifamily Common Area	
Annual kWh Savings	257,052
Annual Therm Savings	
Lifecycle kWh Savings	2,656,288
Lifecycle Therm Savings	
Current kWh Rate	\$ 0.14
Current Therm Rate	
Average 1st Year Bill Savings / Treated Property	\$ 1,624
Average Lifecycle Bill Savings / Treated Property	\$ 16,783

Table 3C, ESA Program –Multifamily Whole Building (MF In-Unit, MF CAM, MFWB)	
Annual kWh Savings	-
Annual Therm Savings	-
Lifecycle kWh Savings	-
Lifecycle Therm Savings	-
Current kWh Rate	\$ -
Current Therm Rate	\$ -
Average 1st Year Bill Savings / Treated Property	\$ -
Average Lifecycle Bill Savings / Treated Property	\$ -

MFWB program is scheduled to launch in July 2023.

**Energy Savings Assistance Program Table 4 - Homes/Buildings Treated
Southern California Edison
Through March 2023**

Table 4A, ESA Program (SF, MH, MF In-Unit)						
County	Eligible Households			Households Treated YTD		
	Rural [1]	Urban	Total	Rural	Urban	Total
Fresno	0	752	752	0	0	0
Imperial	242	0	242	0	1	1
Inyo	2,021	10	2,031	0	0	0
Kern	21,560	16,243	37,803	3	0	3
Kings	11,402	0	11,402	27	0	27
Los Angeles	3,427	677,107	680,534	1	6	7
Madera	0	2	2	0	0	0
Mono	3,262	0	3,262	0	0	0
Orange	1	258,925	258,926	0	3	3
Riverside	119,852	120,935	240,787	7	48	55
San Bernardino	45,526	232,198	277,724	15	27	42
San Diego	1	0	1	0	0	0
Santa Barbara	0	21,536	21,536	0	0	0
Tulare	54,192	15,965	70,157	38	22	60
Tuolumne	1	0	1			
Ventura	3,128	81,935	85,063	0	0	0
Total	264,615	1,425,608	1,690,223	91	107	198

Table 4B, ESA Program - Multifamily Common Area						
County	Eligible Properties [2]			Properties Treated YTD		
				Rural	Urban	Total
Fresno				0	0	0
Imperial				0	0	0
Inyo				0	0	0
Kern				0	0	0
Kings				0	0	0
Los Angeles				0	8	8
Madera				0	0	0
Mono				0	0	0
Orange				0	7	7
Riverside				0	1	1
San Bernardino				2	3	5
San Diego				0	0	0
Santa Barbara				0	0	0
Tulare				1	0	1
Ventura				0	0	0
Total				3	19	22

Table 4C, ESA Program - Multifamily Whole Building (MF CAM, MF In-Unit, MFWB) [3]						
County	Eligible Properties [2]			Properties Treated YTD		
				Rural	Urban	Total
	-	-	-	-	-	0
	-	-	-	-	-	0
Total				0	0	0

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

Table 4E, ESA Program - CSD Leveraging						
County	Eligible Households			Households Treated YTD		
	Rural [1]	Urban	Total	Rural	Urban	Total
	0	0	0	0	0	0
	0	0	0	0	0	0
Total	0	0	0	0	0	0

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

[2] There are currently no eligible properties for ESA MF CAM.

[3] MFWB Implementation to occur no earlier than July 2023.

[4] Pilot Plus/Pilot Deep has not commenced installation activities.

Energy Savings Assistance Program Table 5 - Energy Savings Assistance Program Customer Summary
Southern California Edison
Through March 2023

Table 5A, ESA Program (SF, MH, MF In-Unit)																
Month	Gas & Electric					Gas Only			Electric Only			Total				
	# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January									99	158,582	24	99	158,582	24		
February									165	266,019	42	165	266,019	42		
March									198	326,693	52	198	326,693	52		
April												-	-	-		
May												-	-	-		
June												-	-	-		
July												-	-	-		
August												-	-	-		
September												-	-	-		
October												-	-	-		
November												-	-	-		
December												-	-	-		
YTD									198	326,693	52	198	326,693	52		

Table 5B, ESA Program - MF CAM																
Month	Gas & Electric				Gas Only			Electric Only			Total					
	# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January								8		16,616	2	8		16,616	2	
February								8		16,616	2	8		16,616	2	
March								22		257,052	11	22	-	257,052	11	
April												-	-	-	-	
May												-	-	-	-	
June												-	-	-	-	
July												-	-	-	-	
August												-	-	-	-	
September												-	-	-	-	
October												-	-	-	-	
November												-	-	-	-	
December												-	-	-	-	
YTD								22		257,052	11	22		257,052	11	

Table 5C, ESA Program - Multifamily Whole Building (MF CAM, MF In-Unit, MFWB)																
Month	Gas & Electric				Gas Only				Electric Only				Total			
	# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(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																

Note: MFWB Implementation to occur no earlier than July 2023.

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

Note: No activity as of March 2023.

Table 5E, ESA Program - Building Electrification																
Month	Gas & Electric				Gas Only				Electric Only				Total			
	# of Household Treated by	(Annual)			# of Household Treated by	(Annual)			# of Household Treated by	(Annual)			# of Household Treated by	(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																

Note: No activity as of March 2023.

Energy Savings Assistance Program Table 6 - Expenditures for Pilots and Studies
Southern California Edison
Through March 2023

	Authorized 2021-26 Funding [1]			Current Month Expenses			Year to Date Expenses			Cycle to Date Expenses [2]			% of Budget Expended		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots															
ESA Pilot Plus/Deep Program Pilot	\$ 19,424,318	\$ -	\$ 19,424,318	\$ 178,297	\$ -	\$ 178,297	\$ 205,497	\$ -	\$ 205,497	\$ 499,870	\$ -	\$ 499,870	3%		3%
Building Electrification Retrofit Pilot	\$ 40,832,693	\$ -	\$ 40,832,693	\$ 28,444	\$ -	\$ 28,444	\$ 20,165	\$ -	\$ 20,165	\$ 173,432	\$ -	\$ 173,432	0%		0%
Clean Energy Homes New Construction Pilot	\$ 8,859,000	\$ -	\$ 8,859,000	\$ 9,336	\$ -	\$ 9,336	\$ 66,315	\$ -	\$ 66,315	\$ 103,613	\$ -	\$ 103,613	1%		1%
Total Pilots	\$ 69,116,010	\$ -	\$ 69,116,010	\$ 216,077	\$ -	\$ 216,077	\$ 291,976	\$ -	\$ 291,976	\$ 776,914	\$ -	\$ 776,914	1%		1%
Studies															
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study [3]	\$ 75,000	\$ -	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 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]	\$ 22,495	\$ -	\$ 22,495	\$ -	\$ -	\$ -	\$ 9,627	\$ -	\$ 9,627	\$ 9,627	\$ -	\$ 9,627	43%		43%
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	\$ 51,454	\$ -	\$ 51,454	\$ 51,454	\$ -	\$ 51,454	\$ 79,967	\$ -	\$ 79,967	52%		52%
Joint IOU - Multifamily CAM Process Evaluation [6]	\$ 90,000	\$ -	\$ 90,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%		0%
Joint IOU - Process Evaluation Studies (1-4 Studies)	\$ 150,000	\$ -	\$ 150,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%		0%
Discretionary [5]	\$ 300,000	\$ -	\$ 300,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%		0%
Total Studies	\$ 1,542,495	\$ -	\$ 1,542,495	\$ 51,454	\$ -	\$ 51,454	\$ 61,081	\$ -	\$ 61,081	\$ 164,495	\$ -	\$ 164,495	11%		11%

[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

**Southern California Edison
Through March 2023**

Customer Segments:	Notes:
	<ul style="list-style-type: none"> [1] Athens eligibility estimates at 250 FPL 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 contractors or another utility, which is not reflected in this value. SCE only tracks its direct mail and email campaign efforts. [4] "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/inmate, or is Rural.
Hard to Reach	<ul style="list-style-type: none"> [5] 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 California tribal land, 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.
Vulnerable CARB Communities Disconnected	<ul style="list-style-type: none"> [6] Utilized AB617 Communities identified by CARB's Community Air Protection Program (CAPP)
	<ul style="list-style-type: none"> [7] Based on calendar year 2022. [8] 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. [9] 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.
High Energy Burden SEVI	<ul style="list-style-type: none"> [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 (LINA).
Affordability Ratio	<ul style="list-style-type: none"> [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, and other socioeconomic factors.
Respiratory	<ul style="list-style-type: none"> [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 4.0

Note: The MF In-unit will be tracked with ESA main program until MFWB program launches in July of 2023. Upon MFWB program launch, the data for MF In-Unit and MF CAM will be captured in the MFWB section in the following two tables below.

Note: MFWB Implementation to occur no earlier than July 2023

[illegible]

Energy Savings Assistance Program Table - 7 Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions
Southern California Edison
Through March 2023

New										
Previous										
Seniors										
Veterans										
Hard-to-Reach										
Vulnerable										
Location										
DAC										
Rural										
Tribal										
PSPS Zone										
Wildfire Zone										
Climate Zone 06										
Climate Zone 08										
Climate Zone 09										
Climate Zone 10										
Climate Zone 13										
Climate Zone 14										
Climate Zone 15										
Climate Zone 16										
CARB Communities										
Financial										
CARE										
FERA										
Disconnected										
Arrearages										
High Usage										
High Energy Burden										
SEVI										
H										
M										
L										
Affordability Ratio										
Health Condition										
Medical Baseline										
Respiratory (Asthma)										
H										
M										
L										
Disabled										

Note: The MF In-unit will be tracked with ESA main program until MFWB program launches in July of 2023. Upon MFWB program launch, the data for MF In-Unit and MF CAM will be captured in the MFWB section in

Pilot Plus and Pilot Deep

Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households	Avg. Energy Savings (kW) Per Treated Households		Avg. Energy Savings (Therms) Per Treated Households	Avg. Cost Per Treated Households
Demographic										
Housing Type										
SF			0%		0%					
MH			0%		0%					
MF In-Unit			0%		0%					
Rent vs. Own										
Own			0%		0%					
Rent			0%		0%					
Previous vs. New										
Previous			0%		0%					
New Participant			0%		0%					
Seniors			0%		0%					
Veterans			0%		0%					
Hard-to-Reach			0%		0%					
Vulnerable			0%		0%					
Location										
DAC			0%		0%					
Rural			0%		0%					
Tribal			0%		0%					
PSPS Zone			0%		0%					
Climate Zone 06			0%		0%					
Climate Zone 08			0%		0%					
Climate Zone 09			0%		0%					
Climate Zone 10			0%		0%					
Climate Zone 13			0%		0%					
Climate Zone 14										
Climate Zone 15			0%		0%					
Climate Zone 16			0%		0%					
CARB Communities			0%		0%					
Financial										
CARE			0%		0%					
FERA			0%		0%					
Disconnected			0%		0%					
Arrearages			0%		0%					
High Usage			0%		0%					
High Energy Burden			0%		0%					
SEVI										
Low			0%		0%					
Medium			0%		0%					
High			0%		0%					
Affordability Ratio			0%		0%					
Health Condition										
Medical Baseline			0%		0%					
Respiratory										
Low			0%		0%					
Medium			0%		0%					
High			0%		0%					
Disabled			0%		0%					

No activity as of March 2023.

Building Electrification (SCE Only)

Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households	Avg. Energy Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households	Avg. Cost Per Treated Households
Demographic									
Housing Type									
SF			0%		0%				
MH			0%		0%				
MF In-Unit			0%		0%				
Rent vs. Own									
Own			0%		0%				
Rent			0%		0%				
Previous vs. New									
Previous			0%		0%				
New Participant			0%		0%				
Seniors			0%		0%				
Veterans			0%		0%				
Hard-to-Reach			0%		0%				
Vulnerable			0%		0%				
Location									
DAC			0%		0%				
Rural			0%		0%				
Tribal			0%		0%				
PSPS Zone			0%		0%				
Wildfire Zone			0%		0%				
Climate Zone 06			0%		0%				
Climate Zone 08			0%		0%				
Climate Zone 09			0%		0%				
Climate Zone 10			0%		0%				
Climate Zone 13			0%		0%				
Climate Zone 14			0%		0%				
Climate Zone 15			0%		0%				
Climate Zone 16			0%		0%				

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

Through March 2023								
CARB Communities			0%		0%			
Financial								
CARE			0%		0%			
FERA			0%		0%			
Disconnected			0%		0%			
Arrearages			0%		0%			
High Usage			0%		0%			
High Energy Burden			0%		0%			
SEVI								
Low			0%		0%			
Medium			0%		0%			
High			0%		0%			
Affordability Ratio			0%		0%			
Health Condition								
Medical Baseline			0%		0%			
Respiratory								
Low			0%		0%			
Medium			0%		0%			
High			0%		0%			
Disabled			0%		0%			

No activity as of March 2023.

**Energy Savings Assistance Program Table - 8 Clean Energy Referral, Leveraging, and Coordination
Southern California Edison
Through March 2023**

Partner	Brief Description of Effort	# of Referral	# of Leveraging [1]	# of Coordination Efforts	# of Leads	# of Enrollments
SASH	Provides qualified low-income homeowners fixed, up front, capacity-based incentives to help offset the upfront cost of a solar electric system	139	0	NA	128	0
MASH	Provides solar incentives on qualifying affordable housing multifamily dwellings. MASH is the low-income, multifamily component within the California Solar Initiative program.	29	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	6	6
CARE High Usage	Customers whose usage was identified as exceeding 400% to 600% (or more) above the baseline.	NA	NA	NA	101	2
Demand Response - SDP	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.	50	NA	NA	NA	NA
Demand Response - Smart Energy Program (SEP)	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.	62	NA	NA	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] Sharing of lead list.

Energy Savings Assistance Program Table - 9 Tribal Outreach
Southern California Edison
Through March 2023

OUTREACH STATUS	Quantity (Includes CARE, FERA, and ESA)	List of Participating Tribes
Tribes completed ESA Meet & Confer	10	Benton Paiute, Bishop Paiute, Timbisha Shoshone, Chemehuevi, CRIT, Morongo, Soboba, Pechanga, Bridgeport Indian colony
Tribes requested outreach materials or applications	0	
Tribes who have not accepted offer to Meet and Confer	3	Tule River, Stated residents are over income: San Manuel, 29 Palms, Agua Caliente
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	

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

CARE Table 1 - CARE Program Expenses
Southern California Edison
Through March 2023

CARE Program:	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
Outreach	\$ 3,788,556	\$ -	\$ 3,788,556	\$ (314,862)	\$ -	\$ (314,862)	\$ (140,780)	\$ -	\$ (140,780)	-4%	0%	-4%
Processing / Certification Re-certification	\$ 1,571,943	\$ -	\$ 1,571,943	\$ 166,661	\$ -	\$ 166,661	\$ 489,067	\$ -	\$ 489,067	31%	0%	31%
Post Enrollment Verification	\$ 496,403	\$ -	\$ 496,403	\$ 23,449	\$ -	\$ 23,449	\$ 67,096	\$ -	\$ 67,096	14%	0%	14%
IT Programming	\$ 570,000	\$ -	\$ 570,000	\$ 3,685	\$ -	\$ 3,685	\$ 5,528	\$ -	\$ 5,528	1%	0%	1%
Pilots	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
CHANGES Program	\$ 525,000	\$ -	\$ 525,000	\$ 33,774	\$ -	\$ 33,774	\$ 100,916	\$ -	\$ 100,916	19%	0%	19%
Studies	\$ 81,000	\$ -	\$ 81,000	\$ 61,362	\$ -	\$ 61,362	\$ 71,039	\$ -	\$ 71,039	88%	0%	88%
Regulatory Compliance	\$ 582,694	\$ -	\$ 582,694	\$ 11,753	\$ -	\$ 11,753	\$ 26,621	\$ -	\$ 26,621	5%	0%	5%
General Administration	\$ 1,377,006	\$ -	\$ 1,377,006	\$ 136,889	\$ -	\$ 136,889	\$ 332,787	\$ -	\$ 332,787	24%	0%	24%
CPUC Energy Division	\$ 135,625	\$ -	\$ 135,625	\$ 2,196	\$ -	\$ 2,196	\$ 18,750	\$ -	\$ 18,750	14%	0%	14%
SUBTOTAL MANAGEMENT COSTS	\$ 9,128,227	\$ -	\$ 9,128,227	\$ 124,908	\$ -	\$ 124,908	\$ 971,025	\$ -	\$ 971,025	11%	0%	11%
CARE Rate Discount	\$ 409,564,225	\$ -	\$ 409,564,225	\$ 54,787,894	\$ -	\$ 54,787,894	\$ 156,585,695	\$ -	\$ 156,585,695	38%	0%	38%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 418,692,452	\$ -	\$ 418,692,452	\$ 54,912,802	\$ -	\$ 54,912,802	\$ 157,556,720	\$ -	\$ 157,556,720	38%	0%	38%
Other CARE Rate Benefits												
- DWR Bond Charge Exemption				\$ 1,192,554		\$ 1,192,554	\$ 3,472,268		\$ 3,472,268			
- CARE Surcharge Exemption				\$ 1,975,590		\$ 1,975,590	\$ 5,777,980		\$ 5,777,980			
- California Solar Initiative Exemption				\$ -		\$ -	\$ -		\$ -			
- kWh Surcharge Exemption				\$ -		\$ -	\$ -		\$ -			
- Vehicle Grid Integration Exemption				\$ -		\$ -	\$ -		\$ -			
Total Other CARE Rate Benefits				\$ 3,168,144	\$ -	\$ 3,168,144	\$ 9,250,248	\$ -	\$ 9,250,248			
Indirect Costs				\$ 111,229	\$ -	\$ 111,229	\$ 285,455	\$ -	\$ 285,455			

[1] Budget approved in D.21-06-015, Attachment 1

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 March 2023

	New Enrollment										Recertification				Attrition (Drop Offs)				Enrollment		Total CARE Participants	Estimated CARE Eligible	Enrollment ⁴ Rate % (W/X)	
	Automatic Enrollment			Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non- Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)				
	Inter- Utility ¹	Intra- Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation																Combined (F+G+H+I)
January	72	0	0	72	17,383	1,725	9,337	184	28,629	28,701	22,040	1,928	3,785	27,753	3,424	21	50	35,966	39,461	56,454	-10,760	1,157,921	1,315,495	88%
February	76	2	0	78	12,948	4,270	7,348	219	24,785	24,863	21,092	3,214	3,066	27,372	7,515	5	54	25,824	33,398	52,235	-8,535	1,156,960	1,315,495	88%
March	58	1	0	59	11,588	3,637	7,802	259	23,286	23,345	16,068	9,953	6,646	32,667	3,351	16	57	22,258	25,682	56,012	-2,337	1,158,047	1,315,495	88%
April																								
May																								
June																								
July																								
August																								
September																								
October																								
November																								
December																								
YTD Total	206	3	0	209	41,919	9,632	24,487	662	76,700	76,909	59,200	15,095	13,497	87,792	14,290	42	161	84,048	98,541	164,701	-21,632	1,158,047	1,315,495	88%

¹ Enrollments via data sharing between the IOUs.

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

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

⁴ No response includes no response to both Recertification and Verification.

⁵ Based on the Annual Estimates of CARE and FERA Eligible Customers and Related Information filed on April 13, 2023.

⁶ Penetration Rate and Enrollment Rate are the same value.

CARE Table 3A - Post-Enrollment Verification Results (Model)
Southern California Edison
Through March 2023

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	1,157,921	6,837	0.6%	4,783	9	4,792	70.1%	0.4%
February	1,156,960	7,897	0.7%	0	0	0	0.0%	0.0%
March	1,158,047	7,012	0.6%	0	0	0	0.0%	0.0%
April								
May								
June								
July								
August								
September								
October								
November								
December								
YTD Total	1,158,047	21,746	1.9%	4,783	9	4,792	22.0%	0.4%

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 March 2023

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	1,157,921	1,671	0.1%	1,465	0	1,465	87.7%	0.1%
February	1,156,960	1,957	0.2%	1,609	0	1,609	82.2%	0.1%
March	1,158,047	287	0.0%	0	0	0	0.0%	0.0%
April								
May								
June								
July								
August								
September								
October								
November								
December								
YTD Total	1,158,047	3,915	0.3%	3,074	0	3,074	78.5%	0.3%

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

CARE Table 4 - Enrollment by County
Southern California Edison
Through March 2023

County	Estimated Eligible Households ¹			Total Households Enrolled ²			Enrollment Rate ³		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Fresno	536	0	536	51	0	51	10%	0%	10%
Imperial	0	221	221	28	56	84	0%	25%	38%
Inyo	9	1,548	1,557	26	914	940	289%	59%	60%
Kern	12,901	17,894	30,795	9,255	12,924	22,179	72%	72%	72%
Kings	0	8,652	8,652	75	8,096	8,171	0%	94%	94%
Los Angeles	530,295	2,586	532,881	469,871	1,990	471,861	89%	77%	89%
Madera	2	0	2	0	0	0	0%	0%	0%
Mono	0	2,107	2,107	13	767	780	0%	36%	37%
Orange	203,276	1	203,277	156,873	0	156,873	77%	0%	77%
Riverside	93,754	89,392	183,146	85,588	89,951	175,539	91%	101%	96%
San Bernardino	179,443	34,108	213,551	175,330	35,726	211,056	98%	105%	99%
San Diego	0	1	1	0	1	1	0%	100%	100%
Santa Barbara	16,711	0	16,711	9,051	0	9,051	54%	0%	54%
Tulare	12,330	44,032	56,362	11,658	39,547	51,205	95%	90%	91%
Ventura	63,251	2,445	65,696	48,504	1,752	50,256	77%	72%	76%
Total	1,112,508	202,987	1,315,495	966,323	191,724	1,158,047	87%	94%	88%

¹ Based on the Annual Estimates of CARE and FERA Eligible Customers and Related Information filed on April 13, 2023.

² Total Households Enrolled includes submeter tenants.

³ Penetration Rate and Enrollment Rate are the same value.

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 March 2023**

Month	Total CARE Households	Households Requested to Recertify ¹	% of Households Total (C/B)	Households Recertified ²	Households De-enrolled ³	Recertification Rate % ⁴ (E/C)	% of Total Households De-enrolled (F/B)
January	1,157,921	15,542	1.3%	2,067	13,475	13.3%	1.2%
February	1,156,960	9,316	0.8%	1,987	7,329	21.3%	0.6%
March	1,158,047	2,414	0.2%	1,479	935	61.3%	0.1%
April							
May							
June							
July							
August							
September							
October							
November							
December							
YTD	1,158,047	27,272	2.4%	5,533	21,739	20.3%	1.88%

¹ Excludes count of customers recertified through the probability model.

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

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

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

CARE Table 6 - Capitation Contractors¹
Southern California Edison
Through March 2023

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
2-1-1 ORANGE COUNTY		x			2	7
ALPHA ENTERPRISES		x			-	-
APAC SERVICE CENTER	x				14	39
ARMENIAN RELIEF SOCIETY	x				-	-
ASIAN AMERICAN DRUG ABUSE PROG	x				-	1
ASIAN AMERICAN RESOURCE CENTER	x		x		-	6
ASIAN YOUTH CENTER	x				-	-
BEST PARTNERS	x				186	477
BETHEL BAPTIST CHURCH	x				-	1
BISHOP PAIUTE TRIBE	x				-	2
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			-	-
DELHI CENTER	x				-	-
DESERT COMMUNITY ENERGY		x			-	-
DESERT MANNA MINISTRIES INC	x				-	-
DISABLED RESOURCES CTR, INC		x	x		10	18
EL CONCILIO DEL CONDADO DE	x		x		-	14
FAMILY SVC ASSOC OF REDLANDS	x				-	-
FOOD SHARE	x				-	-
GO THE CALENDAR		x			-	-
GRID ALTERNATIVES INLAND EMPIRE INC			x		10	10
HELP OF OJAI, INC.	x				-	-
HOUSING AUTHORITY OF KINGS CO	x		x		-	-
INLAND SOCIAL 211+	x	x			34	52
KERNVILLE UNION SCHOOL DISTRICT	x				-	26
KINGS COMMUNITY ACTION ORG	x				-	-
KINGS CTY COMMISSION ON AGING	x				-	-
LA COUNTY HOUSING AUTHORITY		x			-	-
LEAGUE OF CALIF HOMEOWNERS	x				-	-
LIFT TO RISE	x				-	-
LTSC COMM. DEVEL. CORP	x				-	-
MENIFEE VALLEY CHAMBER OF COMMERCE		x			-	-
MEXICAN AMERICAN OPPORTUNITY		x	x		-	-
MTN COMM FAM RESOURCE CNTR	x				-	-
NEW GREATER CIR. MISSION, INC	x				-	-
NEW HOPE VILLAGE, INC	x				-	-
NEW HORIZONS CAREGIVERS GROUP		x			-	-
OCCC	x				1	2
OPERATION GRACE	x				-	-
OUR COMMUNITY WORKS	x				2	2
PACIFIC ISLANDER HLTH (PIHP)	x				-	5
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			-	-
SMILES FOR SENIORS FOUND.	x				-	-
SOUTHEAST CITIES SERVICE CTR.		x			-	-
SOUTHEAST COMMUNITY DEVELOPMEN	x				-	-
ST VINCENT DE PAUL		x			-	-
THE CAMBODIAN FAMILY	x				-	-
UNITED CAMBODIAN COMMUNITY INC		x			-	-
VICTOR VALLEY COMM SVC COUNCIL	x				-	-
VIETNAMESE COMMUNITY OF OC INC	x				-	-
VOLUTNEERS OF EAST LOS ANGELES	x		x		-	-
XFINITI SOLUTIONS, LLC		x			-	-
Total Enrollments					259	662

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

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

CARE Program Table 7 - Expenditures for Pilots and Studies
Southern California Edison
Through March 2023

	Authorized 2021-2026 Budget [1]			Current Month Expenses			Year to Date Expenses			Cycle to Date Expenses [2]		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots												
CARE Outbound Calling Pilot	\$ 80,000	\$ -	\$ 80,000	\$ 12,331	\$ -	\$ 12,331	\$ 33,619	\$ -	\$ 33,619	\$ 64,974	\$ -	\$ 64,974
Studies												
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study [3]	\$ 75,000	\$ -	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 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 [4]	\$ 22,495	\$ -	\$ 22,495	\$ -	\$ -	\$ -	\$ 9,627	\$ -	\$ 9,627	\$ 9,627	\$ -	\$ 9,627
Joint IOU - CHANGES Evaluation [5]	\$ 73,503	\$ -	\$ 73,503	\$ -	\$ -	\$ -	\$ 61,045	\$ -	\$ 61,045	\$ 61,045	\$ -	\$ 61,045
Total	\$ 320,998	\$ -	\$ 320,998	\$ -	\$ -	\$ -	\$ 70,672	\$ -	\$ 70,672	\$ 145,573	\$ -	\$ 145,573

[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.

**CARE Table 8 - CARE and Disadvantage Communities Enrollment Rate for Zip Codes
Southern California Edison
Through March 2023**

Total CARE Households Enrolled				
Month	CARE Enrollment Rate for Zip Codes that have 10% or more disconnections [1]	CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG) [2]	CARE Enrollment Rate for Zip Codes in High Poverty (with 70% or Less CARE Penetration) [3]	CARE Enrollment Rate for DAC (Zip/Census Tract) Codes in High Poverty (with 70% or Less CARE Enrollment Rate)
January	NA	80%	45%	55%
February	NA	80%	46%	55%
March	NA	80%	46%	55%
April				
May				
June				
July				
August				
September				
October				
November				
December				
YTD				

Note:

Penetration Rate and Enrollment Rate are the same value.

[1] Disconnections are based on calendar year 2022.

[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; Any required corrections/adjustments are reported herein and supersede results reported in prior months and may

**CARE Table 8A - CARE Top 10 Lowest Enrollment Rates in High Disconnection, High Poverty, and DAC
Communities by Zip Code
Southern California Edison
Through March 2023**

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes that have 10% or more Disconnections [1]
ZIP00001	N/A
ZIP00002	N/A
ZIP00003	N/A
ZIP00004	N/A
ZIP00005	N/A
ZIP00006	N/A
ZIP00007	N/A
ZIP00008	N/A
ZIP00009	N/A
ZIP00010	N/A

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG) [2]
92403	0.00%
92617	11.22%
92341	12.57%
93208	16.40%
93554	19.14%
93260	28.11%
92266	29.75%
93207	31.33%
93265	39.81%
93285	49.80%

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in DAC [3]
93554	19.14%
93260	28.11%
93207	31.33%
93265	39.81%
93285	49.80%
93519	50.24%
92225	51.73%
92347	54.97%
92356	64.29%
92401	64.42%

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 2022.

[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

FERA Table 1 - FERA Program Expenses
Southern California Edison
Through March 2023

	Authorized [1] Budget	Current Month Expenses	Year to Date Expenses	% of Budget Spent YTD
FERA Program:	Electric	Electric	Electric	Electric
Outreach	\$ 729,765	\$ (7,847)	\$ 25,643	4%
Processing / Certification Re-certification	\$ 392,986	\$ 10,879	\$ 26,157	7%
Post Enrollment Verification	\$ 124,101	\$ 775	\$ 2,330	2%
IT Programming	\$ 30,000	\$ 1,005	\$ 1,508	5%
Pilot(s)	\$ -	\$ -	\$ -	0%
Studies	\$ 54,000	\$ -	\$ -	0%
Regulatory Compliance	\$ 18,797	\$ -	\$ -	0%
General Administration	\$ 44,420	\$ 1,167	\$ 2,805	6%
CPUC Energy Division	\$ 4,375	\$ -	\$ -	0%
SUBTOTAL MANAGEMENT COSTS	\$ 1,398,444	\$ 5,980	\$ 58,443	4%
FERA Rate Discount	\$ 37,353,692	\$ 897,399	\$ 2,383,302	6%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 38,752,136	\$ 903,379	\$ 2,441,744	6%
Indirect Costs		\$ 4,503	\$ 10,405	

[1] Budget approved in D.21-06-015, Attachment 1

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

FERA Table 2 - Enrollment, Recertification, Attrition, & Penetration
Southern California Edison
Through March 2023

	New Enrollment									Recertification				Attrition (Drop Offs)				Enrollment			Total FERA Participants	Estimated FERA Eligible ⁵	Enrollment ⁶ Rate % (W/X)	
	Automatic Enrollment			Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicate)	Automatic	Total Recertification (L+M+N)	No Response ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)				
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation																Combined (F+G+H+I)
January	0	0	0	0	874	32	171	0	1,077	1,077	644	8	0	652	920	0	5	1,166	2,091	1,729	-1,014	26,023	223,982	12%
February	0	0	0	0	573	48	122	0	743	743	585	126	67	778	731	0	1	645	1,377	1,521	-634	26,121	223,982	12%
March	0	0	0	0	606	54	132	2	793	793	416	374	190	980	518	0	0	688	1,206	1,773	-413	26,226	223,982	12%
April																								
May																								
June																								
July																								
August																								
September																								
October																								
November																								
December																								
YTD Total	0	0	0	0	2,052	134	425	2	2,613	2,613	1,645	508	257	2,410	2,169	0	6	2,499	4,674	5,023	-2,061	26,226	223,982	12%

¹ Enrollments via data sharing between the IOUs.
² Enrollments via data sharing between departments and/or programs within the utility.
³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.
⁴ No response includes no response to both Recertification and Verification.
⁵ Based on the Annual Estimates of CARE and FERA Eligible Customers and Related Information filed on April 13, 2023.
⁶ Penetration Rate and Enrollment Rate are the same value.

FERA Table 3A - Post-Enrollment Verification Results (Model)
Southern California Edison
Through March 2023

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	26,023	234	0.9%	170	0	170	72.6%	0.7%
February	26,121	209	0.8%	0	0	0	0.0%	0.0%
March	26,226	232	0.9%	0	0	0	0.0%	0.0%
April								
May								
June								
July								
August								
September								
October								
November								
December								
YTD Total	26,226	675	2.6%	170	0	170	25.2%	0.6%

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 March 2023

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	26,023	12	0.0%	12	0	12	100.0%	0.0%
February	26,121	8	0.0%	5	0	5	62.5%	0.0%
March	26,226	0	0.0%	0	0	0	0.0%	0.0%
April								
May								
June								
July								
August								
September								
October								
November								
December								
YTD Total	26,226	20	0.1%	17	0	17	85.0%	0.1%

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

FERA Table 4 - Enrollment by County
Southern California Edison
Through March 2023

County	Estimated Eligible Households ¹			Total Households Enrolled ²			Enrollment Rate ³		
	Urban	Rural	Total	Urban	Rural ³	Total	Urban	Rural	Total
Fresno	110	0	110	3	0	3	3%	0%	3%
Imperial	0	19	19	0	0	0	0%	0%	0%
Inyo	1	145	146	0	29	29	0%	20%	20%
Kern	1,577	1,709	3,286	194	197	391	12%	12%	12%
Kings	0	1,932	1,932	0	165	165	0%	9%	9%
Los Angeles	88,184	1,101	89,285	9,521	96	9,617	11%	9%	11%
Madera	0	0	0	0	0	0	0%	0%	0%
Mono	0	703	703	1	24	25	0%	3%	4%
Orange	32,405	0	32,405	4,110	0	4,110	13%	0%	13%
Riverside	15,812	15,581	31,393	1,992	2,519	4,511	13%	16%	14%
San Bernardino	36,838	6,070	42,908	4,161	809	4,970	11%	13%	12%
San Diego	0	0	0	0	0	0	0%	0%	0%
Santa Barbara	2,540	0	2,540	185	0	185	7%	0%	7%
Tulare	1,993	6,546	8,539	214	677	891	11%	10%	10%
Ventura	10,178	536	10,714	1,281	48	1,329	13%	9%	12%
Total	189,638	34,342	223,980	21,662	4,564	26,226	11%	13%	12%

¹ Based on the Annual Estimates of CARE and FERA Eligible Customers and Related Information filed on April 13, 2023.

² Total Households Enrolled includes submeter tenants.

³ Penetration Rate and Enrollment Rate are the same value.

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

**FERA Table 5 - Recertification Results
Southern California Edison
Through March 2023**

Month	Total FERA Households	Households Requested to Recertify ¹	% of Households Total (C/B)	Households Recertified ²	Households De-enrolled ³	Recertification Rate % ⁴ (E/C)	% of Total Households De-enrolled (F/B)
January	26,023	425	1.6%	23	402	5.4%	1.54%
February	26,121	214	0.8%	21	193	9.8%	0.74%
March	26,226	35	0.1%	14	21	40.0%	0.08%
April							
May							
June							
July							
August							
September							
October							
November							
December							
YTD	26,226	674	2.6%	58	616	8.6%	2.35%

¹ Excludes count of customers recertified through the probability model.

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

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

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

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

FERA Table 6 - Capitation Contractors¹
Southern California Edison
Through March 2023

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
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				-	-
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			-	-
DELHI CENTER	x				-	-
DESERT COMMUNITY ENERGY		x			-	-
DESERT MANNA MINISTRIES INC	x				-	-
DISABLED RESOURCES CTR, INC		x	x		-	-
EL CONCILIO DEL CONDADO DE	x		x		-	-
FAMILY SVC ASSOC OF REDLANDS	x				-	-
FOOD SHARE	x				-	-
GO THE CALENDAR		x			-	-
GRID ALTERNATIVES INLAND EMPIRE INC			x		1	1
HELP OF OJAI, INC.	x				-	-
HOUSING AUTHORITY OF KINGS CO	x		x		-	-
INLAND SOCAL 211+	x	x			-	-
KERNVILLE UNION SCHOOL DISTRIC	x				-	-
KINGS COMMUNITY ACTION ORG	x				-	-
KINGS CTY COMMISSION ON AGING	x				-	-
LA COUNTY HOUSING AUTHORITY		x			-	-
LEAGUE OF CALIF HOMEOWNERS	x				-	-
LIFT TO RISE	x				-	-
LTSC COMM. DEVEL. CORP	x				-	-
MENIFEE VALLEY CHAMBER OF COMMERCE		x			-	-
MEXICAN AMERICAN OPPORTUNITY		x	x		-	-
MTN COMM FAM RESOURCE CNTR	x				-	-
NEW GREATER CIR. MISSION, INC	x				-	-
NEW HOPE VILLAGE, INC	x				-	-
NEW HORIZONS CAREGIVERS GROUP		x			-	-
OCCC	x				-	-
OPERATION GRACE	x				-	-
OUR COMMUNITY WORKS	x				-	-
PACIFIC ISLANDER HLTH (PIHP)	x				-	-
PACIFIC PRIDE FOUNDATION	x				-	-
PRM CONSULTING, Inc.	x	x	x		1	1
RIVERSIDE DEPT COMM ACTION		x	x	x	-	-
SALVATION ARMY SANTA FE SPGS	x				-	-
SALVATION ARMY VISALIA CORPS	x				-	-
SANTA ANITA FAMILY SERVICE	x				-	-
SENIOR ADVOCATES OF THE DESERT	x				-	-
SHARE OUR SELVES	x				-	-
SHIELDS FOR FAMILIES	x	x			-	-
SMILES FOR SENIORS FOUND.	x				-	-
SOUTHEAST CITIES SERVICE CTR.		x			-	-
SOUTHEAST COMMUNITY DEVELOPMEN	x				-	-
ST VINCENT DE PAUL		x			-	-
THE CAMBODIAN FAMILY	x				-	-
UNITED CAMBODIAN COMMUNITY INC		x			-	-
VICTOR VALLEY COMM SVC COUNCIL	x				-	-
VIETNAMESE COMMUNITY OF OC INC	x				-	-
VOLUTNEERS OF EAST LOS ANGELES	x		x		-	-
XFINITI SOLUTIONS, LLC		x			-	-
Total Enrollments					2	2

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

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